



# The CPQ RFP Template for Modern Manufacturing

Ask the right questions. Uncover true capabilities.  
Choose the best partnership.

## Who this template is for:

Manufacturing CPQ owners evaluating solutions who want to go beyond checklists and ensure the selected platform supports scale, speed, and customer-centric growth.

## Why this template:

Developed by CPQ experts and designed for manufacturers, this template helps you evaluate solutions based on what truly matters:

- Cross-functional impact
- Ability to handle product and channel complexity
- Long-term scalability and integration
- Strategic alignment with your goals

## Provided by Tacton:

Tacton helps global manufacturers sell complex solutions with speed, accuracy, and scale through the most complete CPQ buyer engagement platform for manufacturing.



# How to Use This Template:

Use this CPQ RFP template as a tool to lead a smart evaluation process, align internal teams, and uncover which CPQ platform truly supports your goals.

## Use it in 3 Key Ways:

### 1. Before You Send the RFP: Align Internally

- ✓ Use the template to lead a discovery workshop with stakeholders (sales, engineering, IT, ops).
- ✓ Customize the template sections based on your priorities—margin protection, dealer enablement, omnichannel, AI readiness, etc.
- ✓ Define evaluation criteria: strategic fit, ease of implementation, ROI, and cross-functional impact—not just feature lists.

### 2. During Vendor Conversations & Demos

- ✓ Use the RFP questions to drive deeper discovery with vendors beyond simple checkbox answers.
- ✓ Ask for real-world use cases and customer examples that map to your environment.
- ✓ Push vendors to show how they support your business model, channels, and growth plans.

### 3. To Compare Vendors Strategically

- ✓ Use the response framework to evaluate not only what vendors can do, but how they do it with flexibility, scalability, future roadmap, and support.
- ✓ Analyze trade-offs between short-term delivery and long-term value.
- ✓ Prioritize vendors that align with your IT landscape.

# Request for Proposal:

## Section 1: Company and Project Background

### 1.1 Company Overview

Provide a brief overview of your company, including your industry, product lines, regions, and unique sales or engineering challenges.

### 1.2 Project Goals and Drivers

- Strategic Goals:
- Pain Points:
- Desired Business Outcomes:

### 1.3 Current Configuration/Quoting Environment

- CRM:
- ERP:
- CAD/PLM:
- Spreadsheets/Manual Processes:

### 1.4 Project Scope

- Which teams, geographies, and sales channels are in scope?
- Are self-service, visualization, or aftermarket sales included?

### 1.5 Submission Instructions

- Response Deadline:
- Questions Due By:
- Submission Format (Word, Excel, PPT):
- Primary Contact [name, title, email]:

## Section 2: Functional Requirements

### 2.1 Product Configuration

- How does your CPQ system manage complex, constraint-based configurations?
- How do you ensure only valid configurations can be quoted?
- What is the average response time when applying configuration changes during quoting?
- Can configurations be reused across sales, engineering, and manufacturing?
- Do you support lifecycle configuration (e.g., upgrades, add-ons)?

### 2.2 Guided Selling

- How is needs-based selling or guided selection supported?
- Can the interface be tailored per market, product line, or region?
- Is logic built via rules or scripting? Explain how it is maintained.

### 2.3 3D Visualization

- Do you offer integrated real-time 3D visuals linked to configuration logic?
- Is it plugin-free and fully web-based?
- Can users interact with visuals to drive configuration?
- Please share industrial examples.

## 2.4 CAD and Design Automation

- Can your platform automatically generate CAD drawings/models?
- What CAD systems are natively supported?
- How is parametric modeling handled?
- Can CPQ rules drive CAD automation?

## 2.5 Pricing and Discounting

- How are pricing logic, discount approvals, and tiered rules managed?
- Is partner-specific pricing supported?
- Can margin protection rules integrate with ERP cost data?

## 2.6 Quoting and Proposal Generation

- Are branded templates auto-generated per region/customer?
- Do quote documents include sales, engineering, and manufacturing BOMs?

## 2.7 Omnichannel and Self-Service

- Describe support for direct, partner, ecommerce, and mobile channels.
- Is configuration logic shared across channels?

## 2.8 Integration and APIs

- Standard integrations with Salesforce, Dynamics, SAP, Oracle?
- Do you offer open REST APIs for configuration, quoting, BOMs, and CAD?
- How are APIs versioned and documented?

## 2.9 Performance and Scalability

- Can you support 500+ users?
- What's your SLA for uptime?
- Average quote response time with 100+ line items?

## 2.10 Analytics and Reporting

- Are BI connectors/APIs included?
- Can quote and configuration data be exported or visualized in tools like Power BI?

# Section 3: Non-Functional Requirements

## 3.1 Security and Compliance

- Certifications: ISO/IEC 27001, SOC 2, GDPR?
- How is customer data segregated?
- Are all interactions encrypted at rest/in transit?

## 3.2 Localization

- How many languages are supported?
- Can product models and pricing be regionally localized?

## 3.3 Support and SLA

- What support tiers and escalation SLAs are offered?
- Are named support contacts or TAM services included?

## Section 4: Implementation Services

*Please describe:*

- Typical onboarding timeline by complexity
- Roles provided (PM, trainer, solution architect)
- Change management and training options
- Risk mitigation strategies
- Typical timeline for direct sales product line?
- Typical timeline for multi-channel/multi-region deployment?

## Section 5: Technical Requirements Table

Please complete the table at the end of the proposal covering technical requirements:

## Section 6: Pricing and Commercial Model

- What pricing models are available (user-based, transaction, enterprise)?
- Provide pricing per user for configuration and quoting roles
- Are tools like 3D and CAD automation bundled or separate?
- Optional modules/add-ons?
- List minimum contract values if any
- Are packages bundled or à la carte?

## Section 7: Vendor Experience

Include 2–3 relevant case studies in complex manufacturing. Describe what makes your approach unique.

Additional documentation:

- List minimum contract values if any
- Are packages bundled or à la carte?

Thank you for your response. We look forward to reviewing your proposal.

Requirement ID	Category	Subcategory	Requirement Description	Vendor Response (Yes/No)	Notes or Clarifications	Demo Required (Yes/No)
Req-001	Integration & Compatibility	ERP Integration				
Req-002	Integration & Compatibility	CRM Integration				
Req-003	Integration & Compatibility	API Architecture				
Req-004	Integration & Compatibility	Data Synchronization				
Req-005	Usability & UX	User Interface Design				
Req-006	Usability & UX	Ease of Use				
Req-007	Usability & UX	Mobile Accessibility				
Req-008	Scalability & Performance	Performance at Scale				
Req-009	Scalability & Performance	Globalization Support				
Req-010	Security & Compliance	Compliance Standards				
Req-011	Security & Compliance	Data Security				
Req-012	Security & Compliance	Disaster Recovery				
Req-013	Total Cost of Ownership (TCO)	Licensing Model				
Req-014	Innovation & Roadmap	Ongoing Maintenance				
Req-015	Innovation & Roadmap	Product Roadmap				
Req-016	Innovation & Roadmap	Customer Feedback Loop				
Req-017	Deployment & Architecture	Cloud/On-Prem Options				
Req-018	Reporting & Analytics	BI/Analytics Exports				
Req-019	Workflow & Automation	Approvals & Triggers				
Req-020	Product Modeling	Rule Logic Flexibility				