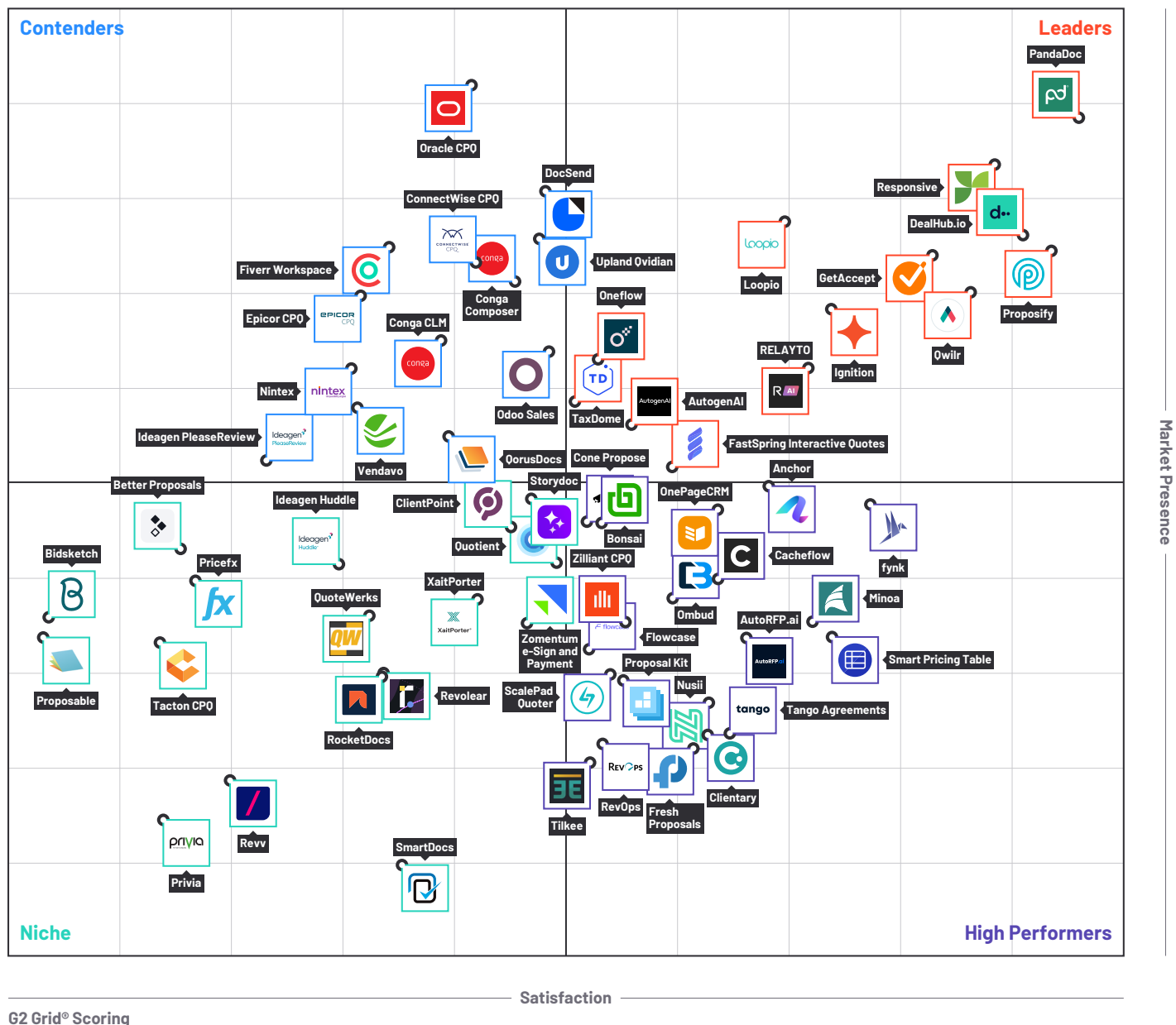


# Grid® Report for Proposal Summer 2025



## Proposal Software



G2 Grid® Scoring

(Proposal Software continues on next page)

# Proposal Software (continued)

## Proposal Software Definition

Proposal software is designed to streamline and automate the proposal and [request for proposal](#) (RFP) process for sales operations. Sales professionals benefit from proposal software features like the ability to quickly generate documents in multiple file formats, share documents through multiple channels, and track the impact of RFP and proposal documents on the sales success. Proposals can be the first important step in a business relationship, which means that salespeople need to include valuable and consistent content that is personalized to customer profiles and needs. Proposal tools are usually used to help sales or partnerships, so common integrations include [CRM software](#), [CPQ software](#), [e-signature software](#), and [accounting software](#).

To qualify for inclusion in the Proposal category, a product must:

- ▶ Provide a repository of documents and templates which can be used to quickly generate proposals
- ▶ Integrate with solutions like CRM and CPQ to pull product and customer data
- ▶ Offer functionality to quickly and efficiently create and send proposals
- ▶ Allow edits and feedback during the proposal process, and track changes made
- ▶ Include analytics to evaluate the efficiency of the proposal process

## Proposal Grid® Scoring Description

Products shown on the Grid® for Proposal have received a minimum of 10 reviews/ratings in data gathered by May 27, 2025. Products are ranked by customer satisfaction (based on user reviews) and market presence (based on market share, seller size, and social impact) and placed into four categories on the Grid®:

- ▶ Products in the Leader quadrant are rated highly by G2 users and have substantial Market Presence scores. Leaders include: [PandaDoc](#), [Responsive](#), formerly RFPIO, [Proposify](#), [DealHub.io](#), [GetAccept](#), [Qwilr](#), [Loopio](#), [Ignition](#), [RELAYTO](#), [Oneflow](#), [AutogenAI](#), [FastSpring Interactive Quotes](#), and [TaxDome](#)
- ▶ High Performing products have high customer Satisfaction scores and low Market Presence compared to the rest of the category. High Performers include: [fynk](#), [Anchor](#), [OnePageCRM](#), [Smart Pricing Table](#), [Minoa](#), [Cacheflow](#), [AutoRFP.ai](#), [Bonsai](#), [Cone Propose](#), [Ombud](#), [Zilliant CPQ](#), [Nusii](#), [Tango Agreements](#), [Clientary](#), [Flowcase](#), [Proposal Kit](#), [ScalePad Quoter](#), [Fresh Proposals](#), [RevOps](#), and [Tilkee](#)
- ▶ Contender products have relatively low customer Satisfaction scores and high Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. Contenders include: [Oracle CPQ](#), [DocSend](#), [Upland Qvidian](#), [Conga Composer](#), [ConnectWise CPQ](#), [Odoo Sales](#), [Fiverr Workspace](#), [Conga CLM](#), [Epicor CPQ](#), [QorusDocs](#), [Nintex](#), [Vendavo](#), and [Ideagen PleaseReview](#)
- ▶ Niche products have relatively low Satisfaction scores and low Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. Niche products include: [Storydoc](#), [Quotient](#), [ClientPoint](#), [Zomentum e-Sign and Payment](#), [XaitPorter](#), [Ideagen Huddle](#), [QuoteWerks](#), [Revolear](#), [RocketDocs](#), [Better Proposals](#), [Pricefx](#), [Tacton CPQ](#), [SmartDocs](#), [Bidsketch](#), [Revv](#), [Proposable](#), and [Privia](#)



# Grid® Scores for Proposal Software

The table below shows the Satisfaction and Market Presence scores that determine product placement on the Grid®. To learn more about each of the products, please see the profile section.

## Leaders

|                               | # of Reviews | Satisfaction | Market Presence | G2 Score |
|-------------------------------|--------------|--------------|-----------------|----------|
| PandaDoc                      | 1317         | 99           | 93              | 96       |
| Responsive, formerly RFPIO    | 705          | 91           | 87              | 89       |
| Proposify                     | 1068         | 96           | 77              | 87       |
| DealHub.io                    | 567          | 94           | 79              | 86       |
| GetAccept                     | 495          | 85           | 77              | 81       |
| Qwilr                         | 739          | 89           | 72              | 80       |
| Loopio                        | 400          | 71           | 80              | 76       |
| Ignition                      | 91           | 75           | 70              | 73       |
| RELAYTO                       | 250          | 73           | 63              | 68       |
| Oneflow                       | 139          | 53           | 64              | 59       |
| AutogenAI                     | 38           | 56           | 57              | 57       |
| FastSpring Interactive Quotes | 13           | 60           | 52              | 56       |
| TaxDome                       | 36           | 51           | 59              | 55       |

(Grid® Scores for Proposal Software continues on next page)

\* Products are ordered by G2 Score. Satisfaction score is used as a tiebreaker if two products have the same G2 Score.



# Grid® Scores for Proposal Software (continued)

The table below shows the Satisfaction and Market Presence scores that determine product placement on the Grid®. To learn more about each of the products, please see the profile section.

## High Performers

|                                     | # of Reviews | Satisfaction | Market Presence | G2 Score |
|-------------------------------------|--------------|--------------|-----------------|----------|
| <a href="#">fynk</a>                | 24           | 79           | 47              | 63       |
| <a href="#">Anchor</a>              | 45           | 69           | 50              | 60       |
| <a href="#">OnePageCRM</a>          | 28           | 64           | 47              | 56       |
| <a href="#">Smart Pricing Table</a> | 44           | 75           | 32              | 54       |
| <a href="#">Minoa</a>               | 18           | 74           | 34              | 54       |
| <a href="#">Cacheflow</a>           | 51           | 65           | 39              | 52       |
| <a href="#">AutoRFP.ai</a>          | 21           | 67           | 32              | 50       |
| <a href="#">Bonsai</a>              | 34           | 53           | 45              | 49       |
| <a href="#">Cone Propose</a>        | 16           | 52           | 45              | 49       |
| <a href="#">Ombud</a>               | 21           | 60           | 36              | 48       |
| <a href="#">Zilliant CPQ</a>        | 16           | 56           | 34              | 45       |
| <a href="#">Nusii</a>               | 24           | 64           | 24              | 44       |
| <a href="#">Tango Agreements</a>    | 10           | 66           | 21              | 43       |
| <a href="#">Clientary</a>           | 32           | 64           | 20              | 42       |
| <a href="#">Flowcase</a>            | 23           | 52           | 30              | 41       |
| <a href="#">Proposal Kit</a>        | 18           | 55           | 27              | 41       |
| <a href="#">ScalePad Quoter</a>     | 20           | 54           | 27              | 41       |
| <a href="#">Fresh Proposals</a>     | 15           | 62           | 19              | 40       |
| <a href="#">RevOps</a>              | 23           | 54           | 19              | 36       |
| <a href="#">Tilkee</a>              | 11           | 52           | 17              | 35       |

(Grid® Scores for Proposal Software continues on next page)

\* Products are ordered by G2 Score. Satisfaction score is used as a tiebreaker if two products have the same G2 Score.



# Grid® Scores for Proposal Software (continued)

The table below shows the Satisfaction and Market Presence scores that determine product placement on the Grid®. To learn more about each of the products, please see the profile section.

## Contenders

|                      | # of Reviews | Satisfaction | Market Presence | G2 Score |
|----------------------|--------------|--------------|-----------------|----------|
| Oracle CPQ           | 77           | 41           | 97              | 69       |
| DocSend              | 293          | 48           | 84              | 66       |
| Upland Qvidian       | 99           | 47           | 78              | 63       |
| Conga Composer       | 291          | 45           | 73              | 59       |
| ConnectWise CPQ      | 105          | 41           | 76              | 59       |
| Odoo Sales           | 13           | 48           | 65              | 57       |
| Fiverr Workspace     | 17           | 33           | 78              | 55       |
| Conga CLM            | 231          | 38           | 67              | 52       |
| Epicor CPQ           | 45           | 30           | 72              | 51       |
| QorusDocs            | 137          | 39           | 55              | 47       |
| Nintex               | 237          | 30           | 63              | 46       |
| Vendavo              | 33           | 30           | 59              | 44       |
| Ideagen PleaseReview | 23           | 21           | 53              | 37       |

(Grid® Scores for Proposal Software continues on next page)

\* Products are ordered by G2 Score. Satisfaction score is used as a tiebreaker if two products have the same G2 Score.



# Grid® Scores for Proposal Software (continued)

The table below shows the Satisfaction and Market Presence scores that determine product placement on the Grid®. To learn more about each of the products, please see the profile section.

## Niche

|                             | # of Reviews | Satisfaction | Market Presence | G2 Score |
|-----------------------------|--------------|--------------|-----------------|----------|
| Storydoc                    | 18           | 47           | 48              | 47       |
| Quotient                    | 21           | 49           | 41              | 45       |
| ClientPoint                 | 197          | 45           | 45              | 45       |
| Zomentum e-Sign and Payment | 30           | 46           | 33              | 40       |
| XaitPorter                  | 47           | 42           | 36              | 39       |
| Ideagen Huddle              | 63           | 28           | 40              | 34       |
| QuoteWerks                  | 134          | 31           | 34              | 33       |
| Revolear                    | 10           | 33           | 27              | 30       |
| RocketDocs                  | 79           | 33           | 27              | 30       |
| Better Proposals            | 48           | 13           | 42              | 28       |
| Pricefx                     | 18           | 15           | 38              | 27       |
| Tacton CPQ                  | 39           | 11           | 31              | 21       |
| SmartDocs                   | 15           | 34           | 5               | 20       |
| Bidsketch                   | 11           | 1            | 34              | 17       |
| Revv                        | 21           | 18           | 15              | 16       |
| Proposable                  | 74           | 0            | 32              | 16       |
| Privia                      | 17           | 12           | 10              | 11       |

\* Products are ordered by G2 Score. Satisfaction score is used as a tiebreaker if two products have the same G2 Score.



# Grid® Methodology

## Grid® Rating Methodology

The Grid® represents the democratic voice of real software users, rather than the subjective opinion of one analyst. G2 rates products from the Proposal category algorithmically based on data sourced from product reviews shared by G2 users and data sourced from third parties.

Technology buyers can use the Grid® to help them quickly select the best products for their businesses and to find peers with similar experiences. For sellers, media, investors, and analysts, the Grid® provides benchmarks for product comparison and market trend analysis.

## Grid® Scoring Methodology

The Grid® Report for Proposal | Summer 2025 is based on reviews collected through May 27, 2025. We apply unique algorithms to this data to calculate Satisfaction (v4.0) and Market Presence (v7.0) scores for the Summer 2025 report quarter. To view the Proposal Grid® with the most recent data, please visit the [Proposal](#) page. For more details on Grid® Scoring, please view the [G2 Scoring Methodology here](#).

## Grid® Categorization Methodology

Making G2 research relevant and easy for people to use as they evaluate and select business software products is one of our most important goals. In support of that goal, organizing products and software companies in a well-defined structure that makes capturing, evaluating, and displaying reviews and other research in an orderly manner is a critical part of the research process.

To manage the process of categorizing the software products and the related reviews in the G2 community, G2 follows a publicly available [categorization methodology](#). All products appearing on the Grid® have passed through G2's categorization methodology and meet G2's category standards.

Many terms that appear regularly across G2 and are used to aid in product categorization warrant a definition to facilitate buyer understanding. These terms may be included within reviews from the G2 community or in executive summaries for products included on the Grid®. A [list of standard definitions](#) is available to G2 users to eliminate confusion and ease the buying process.

## Rating Changes and Dynamics

The ratings in this report are based on a snapshot of the user reviews and third-party data collected by G2 up through May 27, 2025. The ratings may change as the products are further developed, the sellers grow, and as additional opinions are shared by users. G2 updates the ratings on its website in real time as additional data is received, and this report will be updated as significant data is received. By improving their products and support and/or by having more satisfied customer voices heard, Contenders may become Leaders and Niche sellers may become High Performers.

## Trust

Keeping our ratings unbiased is our top priority. G2 follows defined community guidelines to ensure privacy, and authenticity for users and reviews. For more details, please view the [G2 Community Guidelines here](#).

*(Grid® Methodology continues on next page)*

\*\* Net Promoter, Net Promoter System, Net Promoter Score, NPS and the NPS-related emoticons are registered trademarks of Bain & Company, Inc., Fred Reichheld and Satmetrix Systems, Inc.



# Grid® Methodology (continued)

## Grid® Inclusion Criteria

All products in a G2 category that have at least 10 reviews from real users of the product are included on the Grid®. Inviting other users, such as colleagues and peers, to join G2 and share authentic product reviews will accelerate this process.

If a product is not yet listed on G2 and it fits the market definition above, then users are encouraged to [suggest its addition](#) to our [Proposal category](#).

## Product Profiles

Product profiles and detailed charts are included for products with 10 or more reviews.



# PandaDoc

4.7



(2,858)



PandaDoc has been named a Leader based on receiving a high customer Satisfaction score and having a large Market Presence. PandaDoc received the highest Satisfaction score among products in Proposal. 97% of users rated it 4 or 5 stars, 92% of users believe it is headed in the right direction, and users said they would be likely to recommend PandaDoc at a rate of 93%. PandaDoc is also in the Online Form Builder, E-Notary, Document Generation, E-Signature, Salesforce AppExchange Apps, CPQ, and Contract Management categories.

## Satisfaction Ratings

### Quality of Support



### Ease of Use



### Meets Requirements



### Ease of Admin



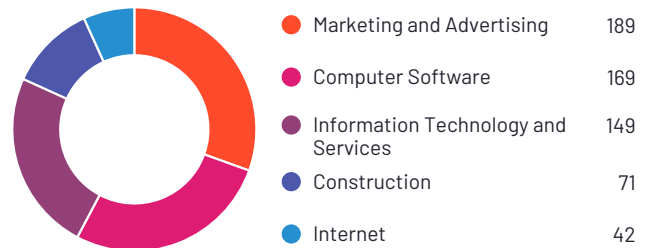
### Ease of Doing Business With



### Ease of Setup



## Top Industries Represented



## Highest-Rated Features

### E-Signature Integration



### PDF Creation



### Engagement Tracking



## Lowest-Rated Features

### AI Text Generation



### CRM Integration



### Rich Media



**Ownership**  
PandaDoc



**HQ Location**  
San Francisco, CA



**Year Founded**  
2011



**Employees (Listed  
On LinkedIn)**  
796



**Company Website**  
[pandadoc.com](https://pandadoc.com)



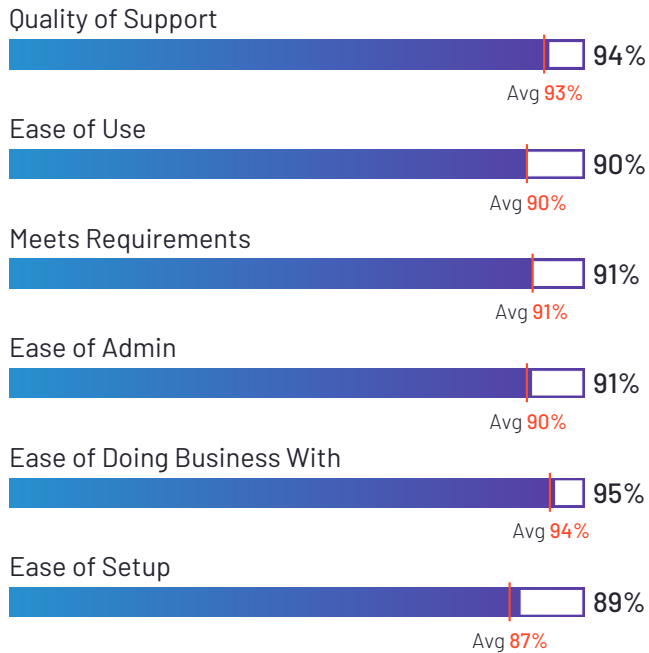
# Responsive, formerly RFPIO

4.5 ★★★★★ (1,148)

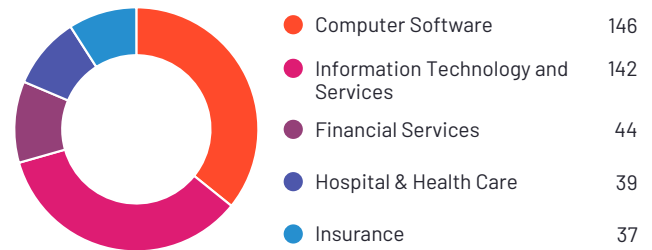


Responsive, formerly RFPIO has been named a Leader based on receiving a high customer Satisfaction score and having a large Market Presence. 98% of users rated it 4 or 5 stars, 92% of users believe it is headed in the right direction, and users said they would be likely to recommend Responsive, formerly RFPIO at a rate of 92%. Responsive, formerly RFPIO is also in the Vendor Security and Privacy Assessment, RFP, Document Generation, Salesforce AppExchange Apps, and Strategic Sourcing categories.

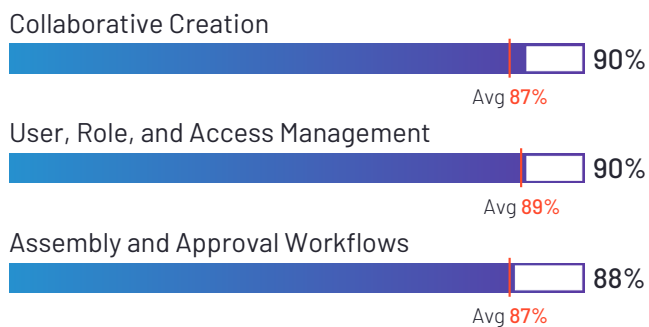
## Satisfaction Ratings



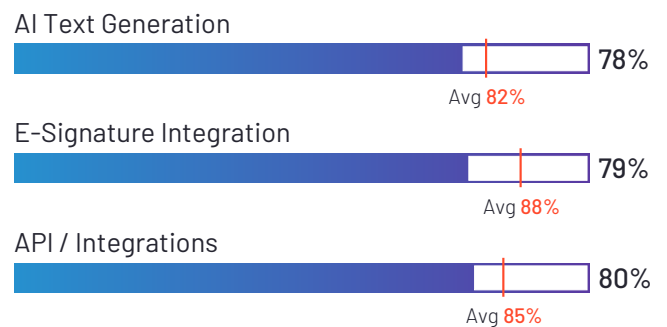
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
Responsive



**HQ Location**  
Frisco, Texas



**Year Founded**  
2016



**Employees (Listed On LinkedIn)**  
633



**Company Website**  
[responsive.io](https://responsive.io)



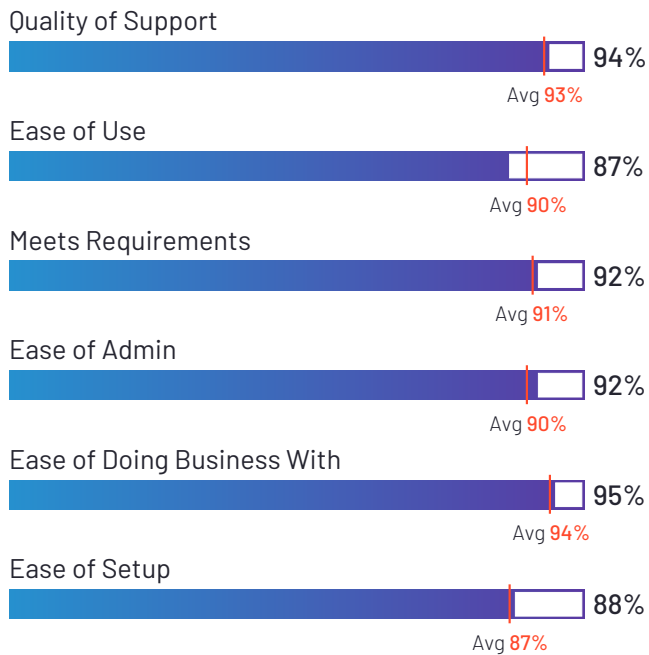
# Proposify

4.6 ★★★★★ (1,119)



Proposify has been named a Leader based on receiving a high customer Satisfaction score and having a large Market Presence. 96% of users rated it 4 or 5 stars, 93% of users believe it is headed in the right direction, and users said they would be likely to recommend Proposify at a rate of 93%. Proposify is also in the Document Generation, CPQ, Contract Management, and E-Signature categories.

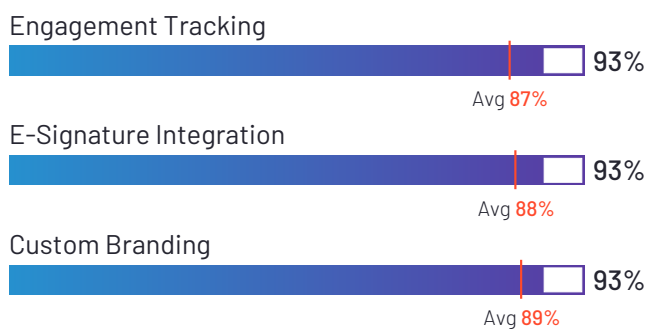
## Satisfaction Ratings



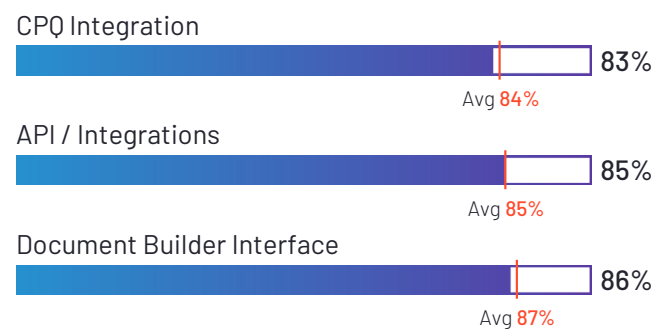
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
Proposify



**HQ Location**  
Halifax



**Year Founded**  
2012



**Employees (Listed On LinkedIn)**  
70



**Company Website**  
[proposify.com](https://proposify.com)



# DealHub.io

4.7 ★★★★★ (729)



DealHub.io has been named a Leader based on receiving a high customer Satisfaction score and having a large Market Presence. 99% of users rated it 4 or 5 stars, 95% of users believe it is headed in the right direction, and users said they would be likely to recommend DealHub.io at a rate of 95%. DealHub.io is also in the Digital Sales Room, Contract Lifecycle Management (CLM), Sales Engagement, Document Generation, Salesforce CRM Document Generation, Sales Enablement, CPQ, Contract Management, and Subscription Billing categories.

## Satisfaction Ratings

### Quality of Support



### Ease of Use



### Meets Requirements



### Ease of Admin



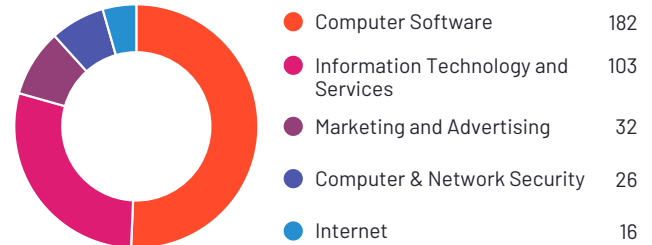
### Ease of Doing Business With



### Ease of Setup



## Top Industries Represented



## Highest-Rated Features

### E-Signature Integration



### CPQ Integration



### Customizability: Variables and Fields



## Lowest-Rated Features

### AI Text Generation



### Reporting and Dashboards



### Proposal Effectiveness Reporting



**Ownership**  
DealHub.io



**HQ Location**  
Austin, Texas



**Year Founded**  
2014



**Employees (Listed  
On LinkedIn)**  
244



**Company Website**  
[dealhub.io](https://dealhub.io)



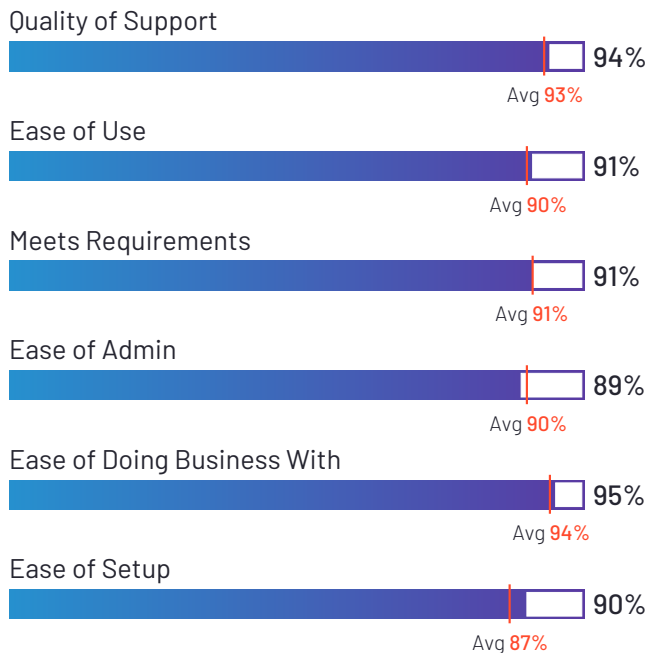
# GetAccept

4.6 ★★★★★ (961)

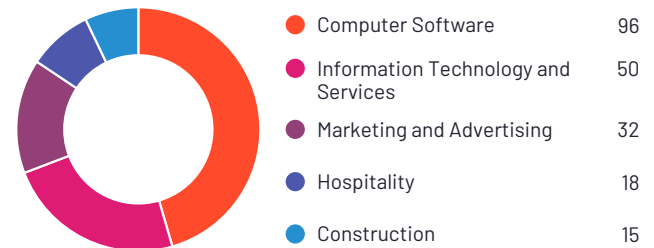


GetAccept has been named a Leader based on receiving a high customer Satisfaction score and having a large Market Presence. 98% of users rated it 4 or 5 stars, 93% of users believe it is headed in the right direction, and users said they would be likely to recommend GetAccept at a rate of 93%. GetAccept is also in the E-Signature APIs, Digital Sales Room, Sales Engagement, Sales Enablement, E-Signature, Salesforce AppExchange Apps, Contract Management, Document Generation, and Salesforce CRM Document Generation categories.

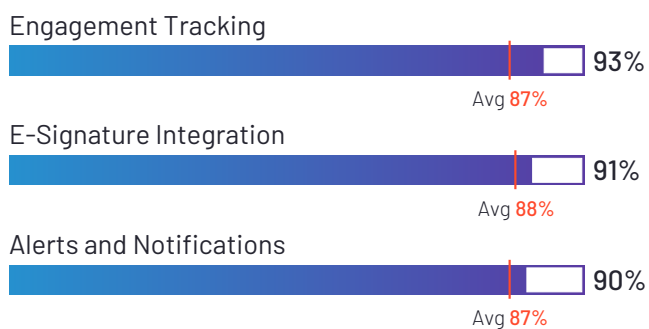
## Satisfaction Ratings



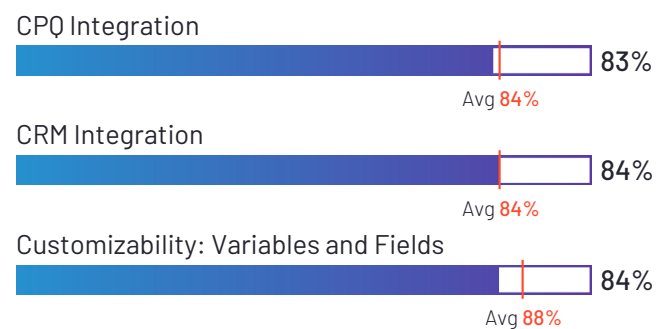
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
GetAccept Inc.



**HQ Location**  
Palo Alto, CA



**Year Founded**  
2015



**Employees (Listed On LinkedIn)**  
169



**Company Website**  
[getaccept.com](https://getaccept.com)



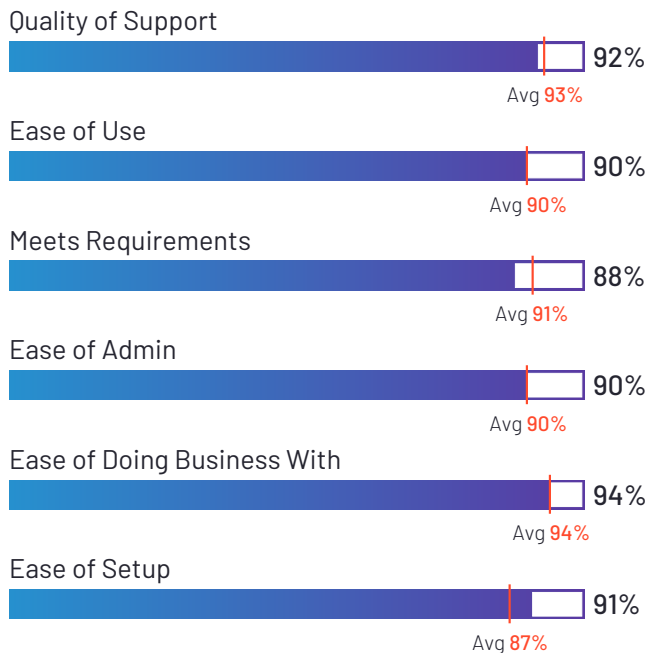
Qwilr

4.6 ★★★★★ (796)

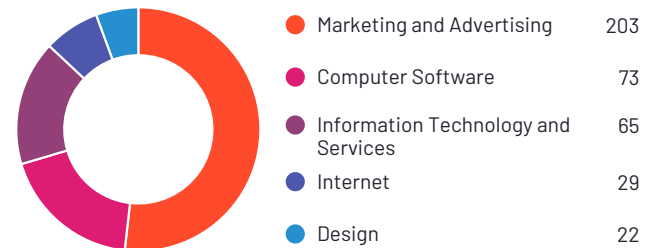


Qwilr has been named a Leader based on receiving a high customer Satisfaction score and having a large Market Presence. 96% of users rated it 4 or 5 stars, 93% of users believe it is headed in the right direction, and users said they would be likely to recommend Qwilr at a rate of 91%. Qwilr is also in the Document Generation, E-Signature, CPQ, Contract Management, Sales Enablement, and Digital Sales Room categories.

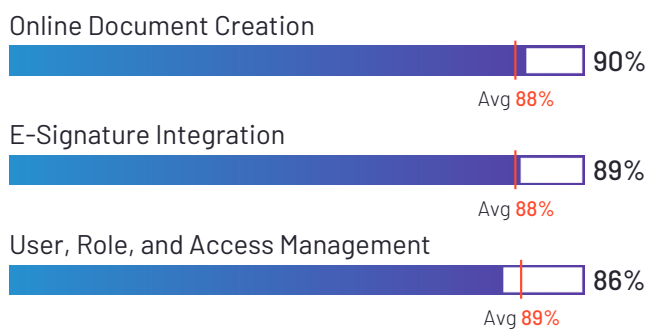
## Satisfaction Ratings



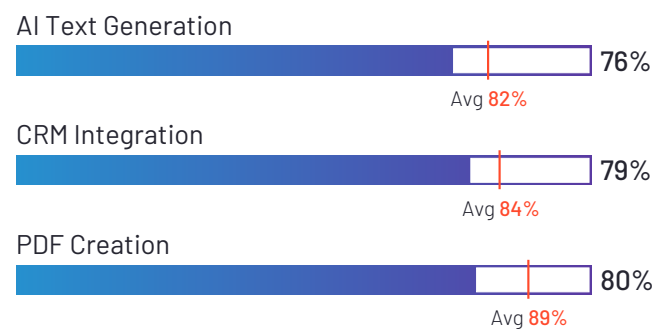
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
Qwilr



**HQ Location**  
Redfern, New South  
Wales



**Year Founded**  
2014



**Employees (Listed  
On LinkedIn)**  
94



**Company Website**  
[qwilr.com](https://qwilr.com)



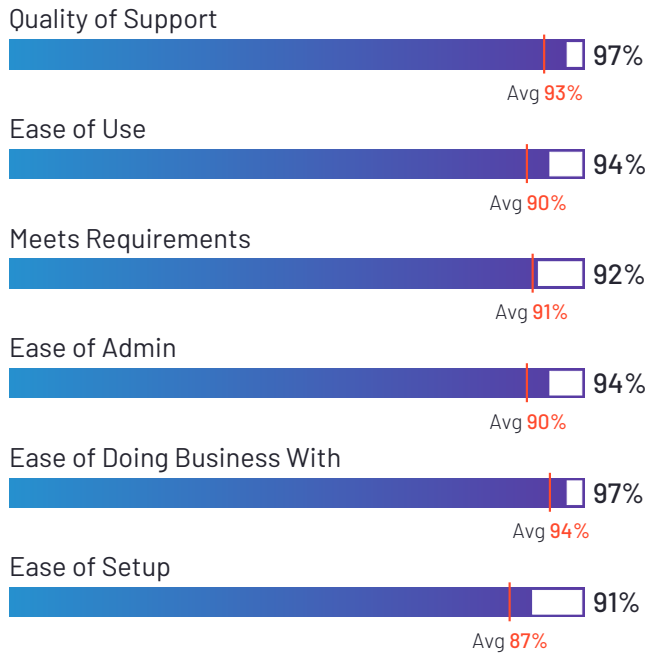
# Loopio

4.7 ★★★★★ (656)



Loopio has been named a Leader based on receiving a high customer Satisfaction score and having a large Market Presence. 99% of users rated it 4 or 5 stars, 97% of users believe it is headed in the right direction, and users said they would be likely to recommend Loopio at a rate of 95%. Loopio is also in the RFP, Salesforce AppExchange Apps, and Vendor Security and Privacy Assessment categories.

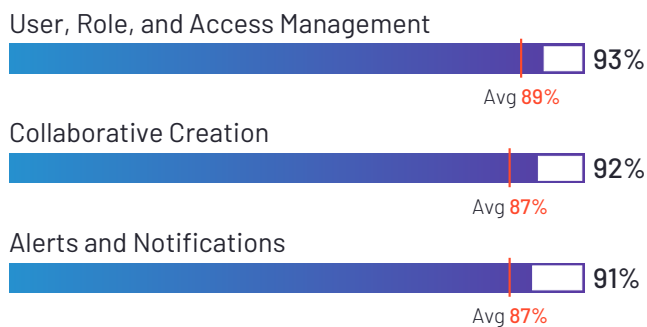
## Satisfaction Ratings



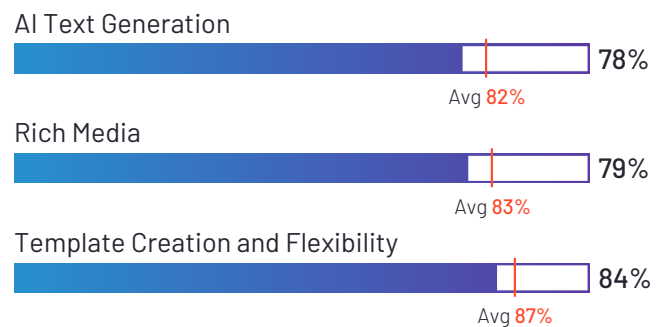
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
Loopio Inc.



**HQ Location**  
Toronto



**Year Founded**  
2014



**Employees (Listed On LinkedIn)**  
294



**Company Website**  
[www.loopio.com](http://www.loopio.com)



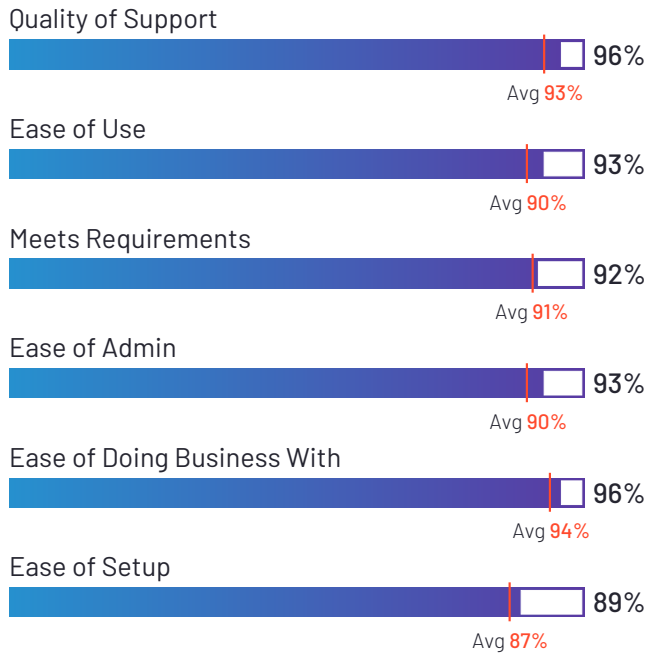
# Ignition

4.7 ★★★★★ (96)



Ignition has been named a Leader based on receiving a high customer Satisfaction score and having a large Market Presence. 97% of users rated it 4 or 5 stars, 100% of users believe it is headed in the right direction, and users said they would be likely to recommend Ignition at a rate of 95%. Ignition is also in the E-Signature, Contract Management, and Payment Processing categories.

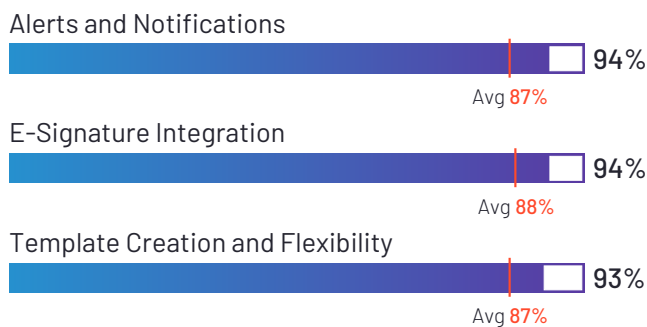
## Satisfaction Ratings



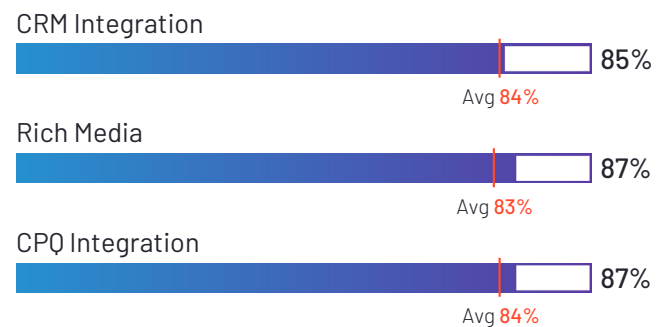
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
Ignition



**HQ Location**  
Chippendale, Australia



**Year Founded**  
2011



**Employees (Listed On LinkedIn)**  
274



**Company Website**  
[ignitionapp.com](https://ignitionapp.com)



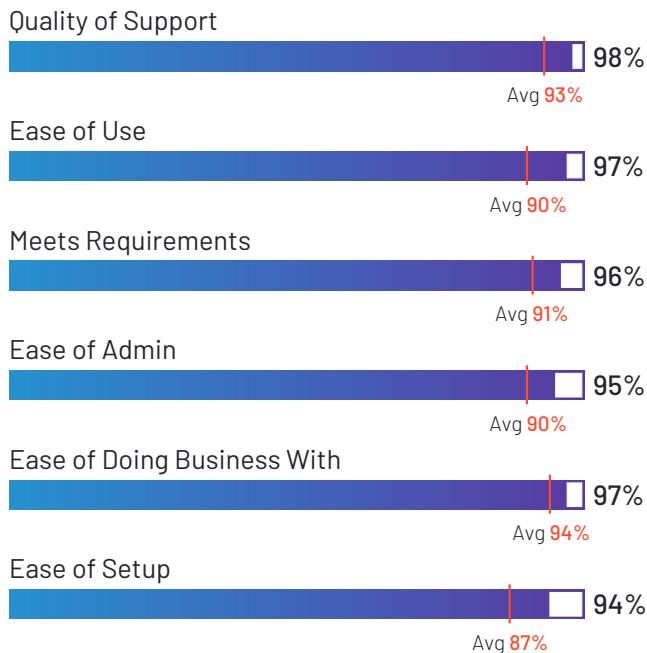
## RELAYTO

4.7 ★★★★★ (453)

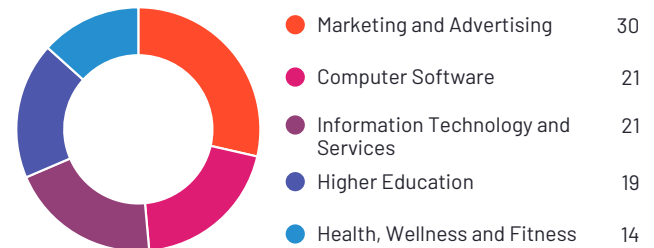


RELAYTO has been named a Leader based on receiving a high customer Satisfaction score and having a large Market Presence. 100% of users rated it 4 or 5 stars, 98% of users believe it is headed in the right direction, and users said they would be likely to recommend RELAYTO at a rate of 97%. RELAYTO is also in the Demo Automation, Digital Sales Room, Content Curation, Account-Based Web and Content Experiences, Flipbook, Content Distribution, Content Experience Platforms, Content Creation, Sales Enablement, Content Analytics, CMS Tools, Presentation, and AI Content Creation Platforms categories.

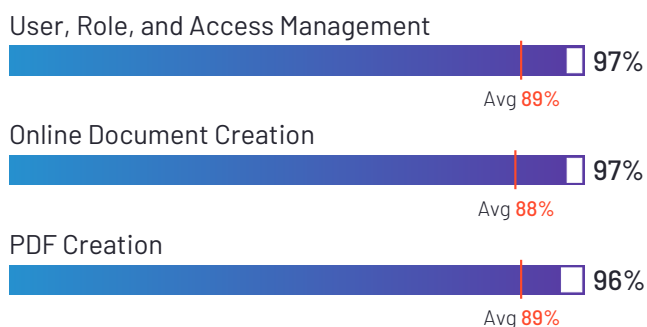
## Satisfaction Ratings



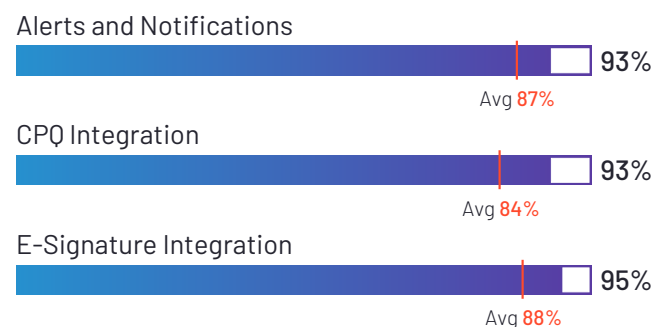
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
Relayto



**HQ Location**  
San Francisco ,  
California



**Year Founded**  
2023



**Employees (Listed  
On LinkedIn)**  
49



**Company Website**  
[relayto.com](https://relayto.com)



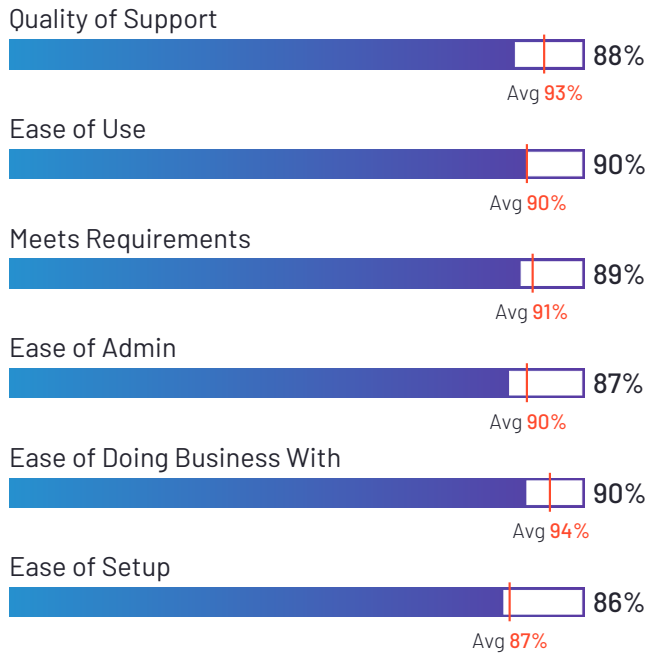
# Oneflow

4.4 ★★★★★ (369)

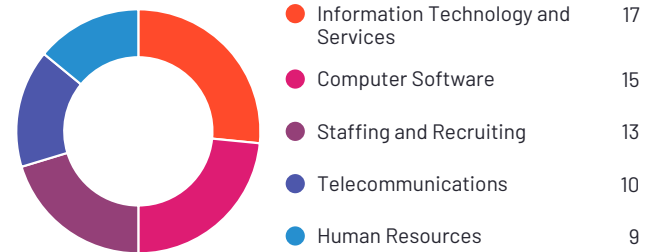


Oneflow has been named a Leader based on receiving a high customer Satisfaction score and having a large Market Presence. 96% of users rated it 4 or 5 stars, 87% of users believe it is headed in the right direction, and users said they would be likely to recommend Oneflow at a rate of 89%. Oneflow is also in the Contract Lifecycle Management (CLM), E-Signature, Salesforce AppExchange Apps, Contract Management, and Contract Analytics categories.

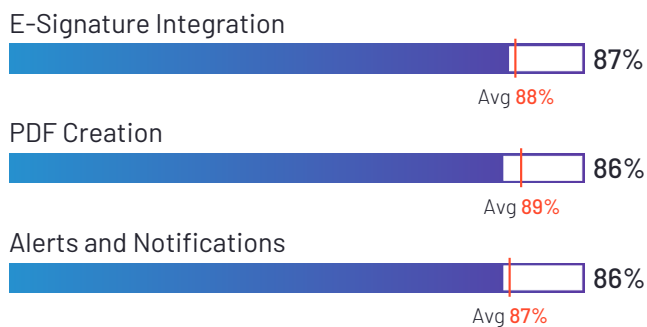
## Satisfaction Ratings



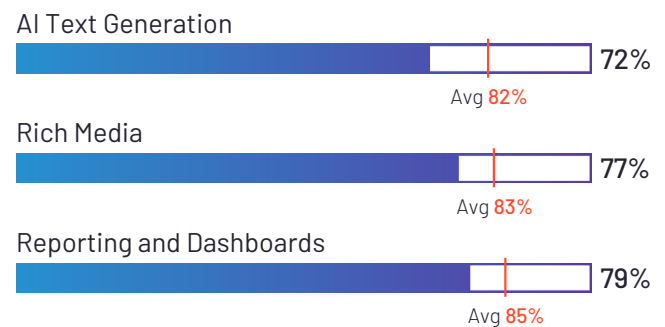
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
Oneflow



**HQ Location**  
Stockholm,  
Stockholm County



**Year Founded**  
2012



**Employees (Listed  
On LinkedIn)**  
182



**Company Website**  
[oneflow.com](https://oneflow.com)

AutogenAI

# AutogenAI

4.5 ★★★★★ (57)



AutogenAI has been named a Leader based on receiving a high customer Satisfaction score and having a large Market Presence. 100% of users rated it 4 or 5 stars, 100% of users believe it is headed in the right direction, and users said they would be likely to recommend AutogenAI at a rate of 90%. AutogenAI is also in the Bid Management, RFP, and AI Writing Assistant categories.

## Satisfaction Ratings

### Quality of Support



### Ease of Use



### Meets Requirements



### Ease of Admin



### Ease of Doing Business With



### Ease of Setup



## Top Industries Represented



## Highest-Rated Features

### AI Text Generation



### Collaborative Creation



### Document Builder Interface



## Lowest-Rated Features

### Rich Media



### E-Signature Integration



### CRM Integration



**Ownership**  
AutogenAI



**HQ Location**  
New York, NY



**Year Founded**  
2022



**Employees (Listed On LinkedIn)**  
200



**Company Website**  
[autogenai.com](https://autogenai.com)



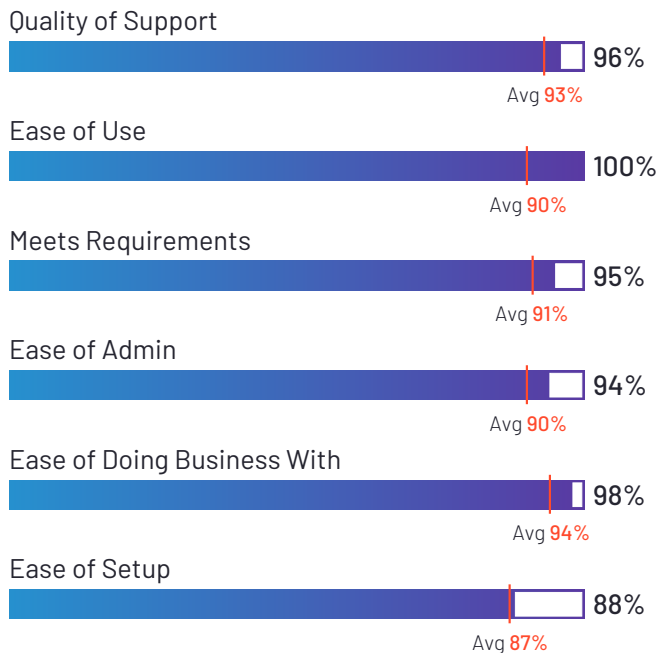
# FastSpring Interactive Quotes

4.7 ★★★★★ (17)



FastSpring Interactive Quotes has been named a Leader based on receiving a high customer Satisfaction score and having a large Market Presence. 100% of users rated it 4 or 5 stars, 91% of users believe it is headed in the right direction, and users said they would be likely to recommend FastSpring Interactive Quotes at a rate of 94%. FastSpring Interactive Quotes is also in the CPQ category.

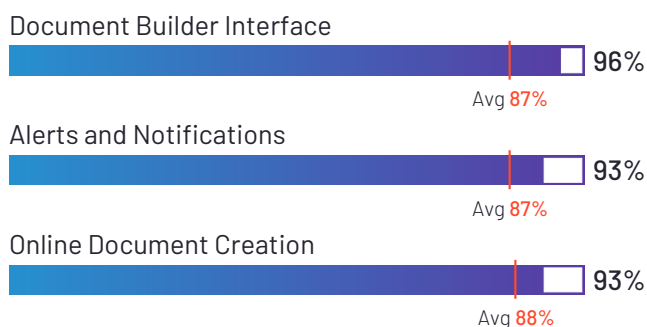
## Satisfaction Ratings



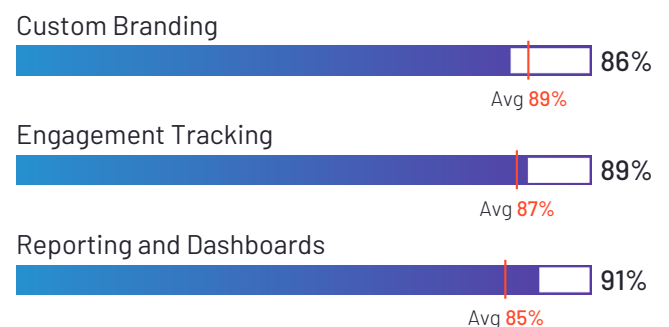
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
FastSpring



**HQ Location**  
Santa Barbara, CA



**Year Founded**  
2005



**Employees (Listed On LinkedIn)**  
157



**Company Website**  
[fastspring.com](https://fastspring.com)



# TaxDome

4.7 ★★★★★ (630)



TaxDome has been named a Leader based on receiving a high customer Satisfaction score and having a large Market Presence. 100% of users rated it 4 or 5 stars, 97% of users believe it is headed in the right direction, and users said they would be likely to recommend TaxDome at a rate of 94%. TaxDome is also in the Tax Practice Management, Accounting Practice Management, Workflow Management, and Client Portal categories.

## Satisfaction Ratings

### Quality of Support



### Ease of Use



### Meets Requirements



### Ease of Admin



### Ease of Doing Business With



### Ease of Setup



## Top Industries Represented



## Highest-Rated Features

### Assembly and Approval Workflows



### Alerts and Notifications



### User, Role, and Access Management



## Lowest-Rated Features

### AI Text Generation



### Reporting and Dashboards



### Online Document Creation



**Ownership**  
TaxDome



**HQ Location**  
New York, US



**Year Founded**  
2017



**Employees (Listed  
On LinkedIn)**  
252



**Company Website**  
[taxdome.com](https://taxdome.com)



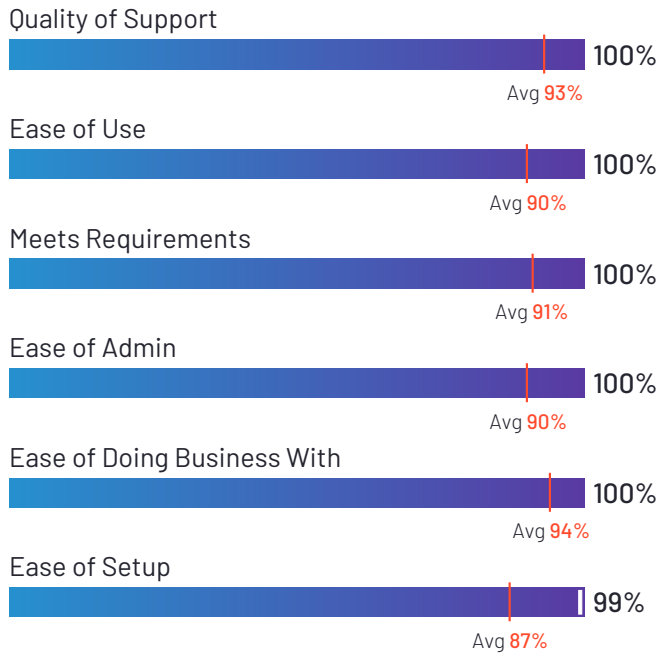
fynk

4.9 ★★★★★ (35)

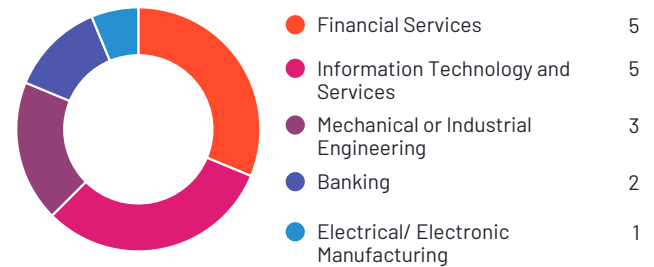


fynk has been named a High Performer product based on having high customer Satisfaction scores and a low Market Presence compared to the rest of the category. 100% of users rated it 4 or 5 stars, 100% of users believe it is headed in the right direction, and users said they would be likely to recommend fynk at a rate of 99%. fynk is also in the Online Form Builder, Document Generation, E-Signature, Contract Management, and Contract Lifecycle Management (CLM) categories.

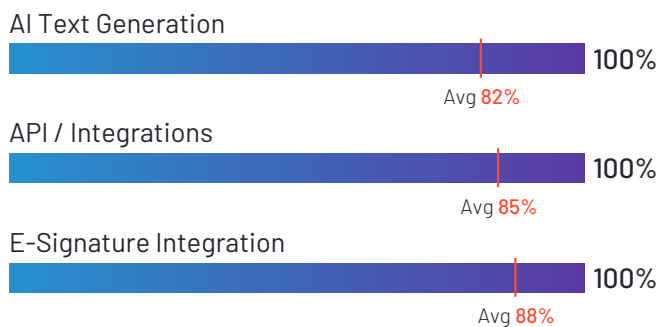
## Satisfaction Ratings



## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
fynk GmbH



**HQ Location**  
Vienna



**Year Founded**  
2022



**Employees (Listed On LinkedIn)**  
28



**Company Website**  
[fynk.com](https://fynk.com)



# Anchor

4.9 ★★★★★ (57)



Anchor has been named a High Performer product based on having high customer Satisfaction scores and a low Market Presence compared to the rest of the category. 100% of users rated it 4 or 5 stars, 100% of users believe it is headed in the right direction, and users said they would be likely to recommend Anchor at a rate of 97%. Anchor is also in the Cash Flow Management, Accounts Receivable, Invoice Management, and Billing categories.

## Satisfaction Ratings

### Quality of Support



### Ease of Use



### Meets Requirements



### Ease of Admin



### Ease of Doing Business With



### Ease of Setup



## Top Industries Represented



## Highest-Rated Features

### E-Signature Integration



### Document Builder Interface



### Template Creation and Flexibility



## Lowest-Rated Features

### CRM Integration



### CPQ Integration



### Proposal Effectiveness Reporting



**Ownership**  
Anchor



**HQ Location**  
New York, US



**Employees (Listed  
On LinkedIn)**  
60



**Company Website**  
[sayanchor.com](https://sayanchor.com)



# OnePageCRM

4.7 ★★★★★ (208)



OnePageCRM has been named a High Performer product based on having high customer Satisfaction scores and a low Market Presence compared to the rest of the category. 100% of users rated it 4 or 5 stars, 100% of users believe it is headed in the right direction, and users said they would be likely to recommend OnePageCRM at a rate of 97%. OnePageCRM is also in the Business Card Scanning, Email Template Builder, Sales Engagement, Lead Capture, CRM, and Sales Performance Management categories.

## Satisfaction Ratings

### Quality of Support



### Ease of Use



### Meets Requirements



### Ease of Admin



### Ease of Doing Business With



### Ease of Setup



## Top Industries Represented



## Highest-Rated Features

### CRM Integration



### API / Integrations



### Rich Media



## Lowest-Rated Features

### CPQ Integration



### E-Signature Integration



### Engagement Tracking



**Ownership**  
OnePageCRM



**HQ Location**  
Galway, Ireland



**Year Founded**  
2010



**Employees (Listed  
On LinkedIn)**  
23



**Company Website**  
[onepagecrm.com](https://onepagecrm.com)



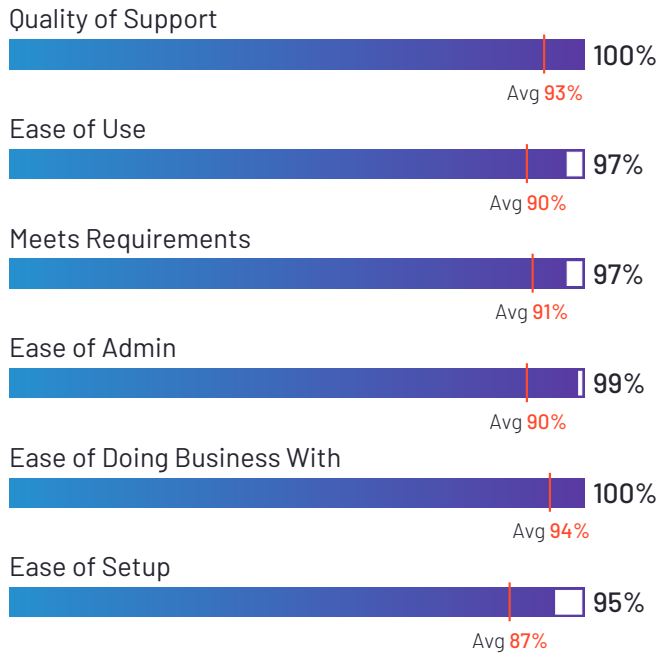
## Smart Pricing Table

5.0 ★★★★★ (44)



Smart Pricing Table has been named a High Performer product based on having high customer Satisfaction scores and a low Market Presence compared to the rest of the category. 100% of users rated it 4 or 5 stars, 100% of users believe it is headed in the right direction, and users said they would be likely to recommend Smart Pricing Table at a rate of 100%.

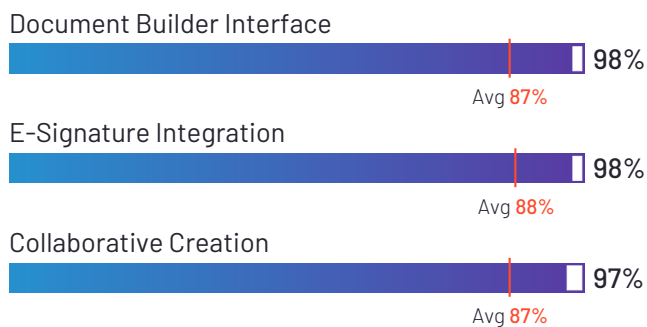
### Satisfaction Ratings



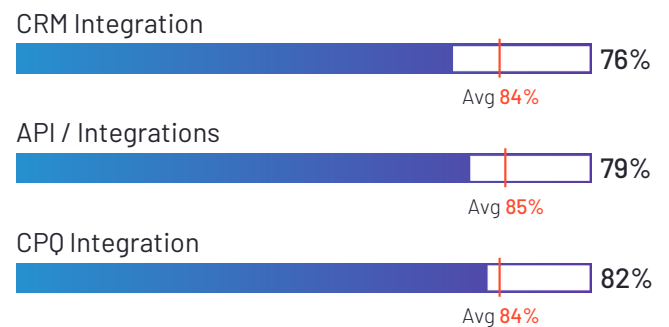
### Top Industries Represented



### Highest-Rated Features



### Lowest-Rated Features



**Ownership**  
Smart Pricing Table



**Year Founded**  
2020



**Employees (Listed On LinkedIn)**  
7



**Company Website**  
[smartpricingsmart.com](https://smartpricingsmart.com)



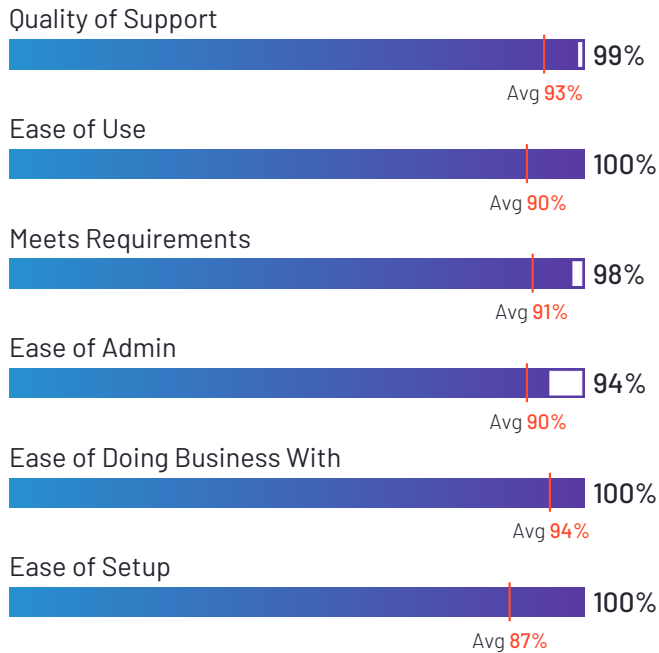
# Minoa

5.0 ★★★★★ (24)

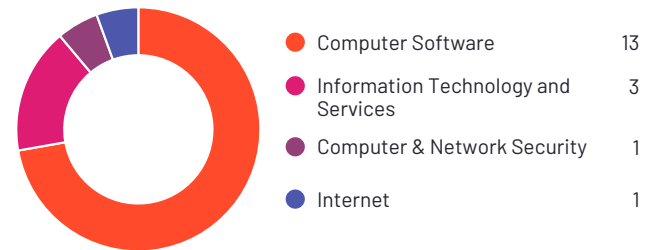


Minoa has been named a High Performer product based on having high customer Satisfaction scores and a low Market Presence compared to the rest of the category. 100% of users rated it 4 or 5 stars, 100% of users believe it is headed in the right direction, and users said they would be likely to recommend Minoa at a rate of 100%. Minoa is also in the Sales Enablement and Value Selling Tools categories.

## Satisfaction Ratings



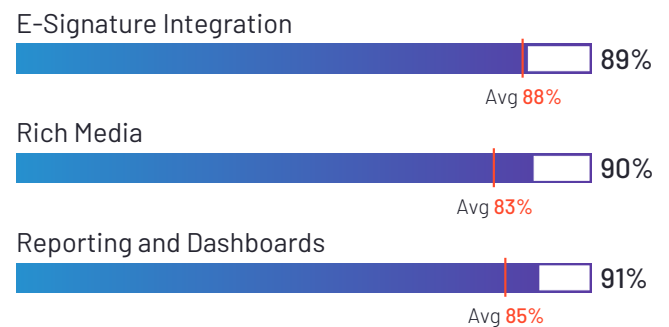
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
Minoa



**HQ Location**  
San Francisco,  
California



**Year Founded**  
2023



**Employees (Listed  
On LinkedIn)**  
14



**Company Website**  
[www.minoa.io](http://www.minoa.io)



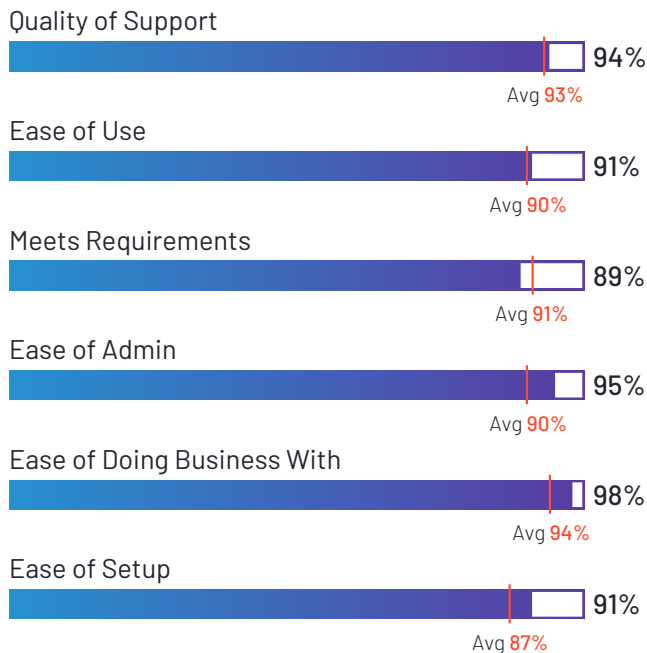
# Cacheflow

4.6 ★★★★★ (58)

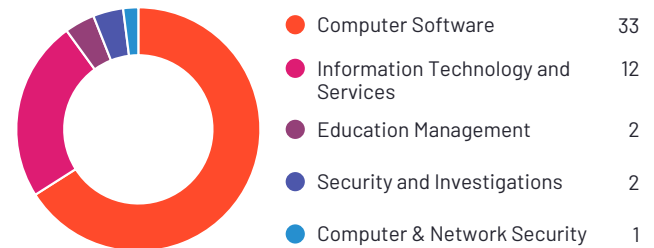


Cacheflow has been named a High Performer product based on having high customer Satisfaction scores and a low Market Presence compared to the rest of the category. 98% of users rated it 4 or 5 stars, 92% of users believe it is headed in the right direction, and users said they would be likely to recommend Cacheflow at a rate of 93%. Cacheflow is also in the Quote-to-Cash, Pricing, CPQ, Subscription Billing, and Subscription Revenue Management categories.

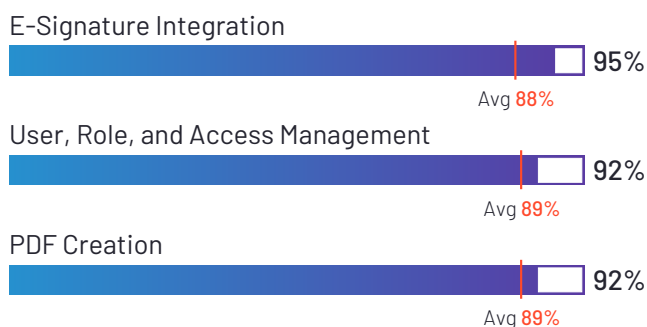
## Satisfaction Ratings



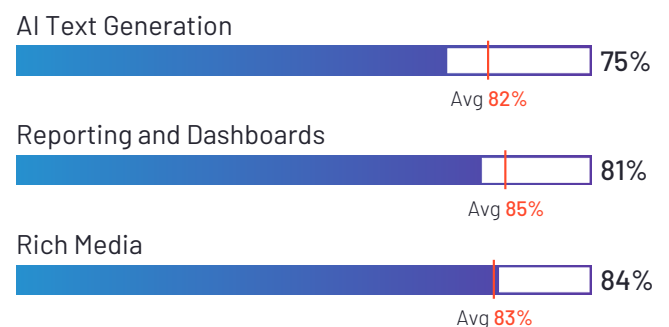
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
Cacheflow



**HQ Location**  
Los Altos, CA



**Year Founded**  
2021



**Employees (Listed On LinkedIn)**  
23



**Company Website**  
[getcacheflow.com](https://getcacheflow.com)



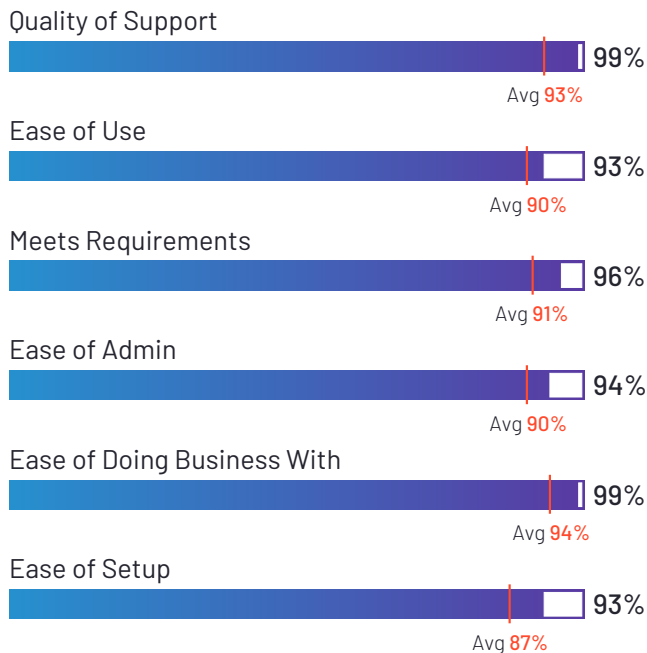
# AutoRFP.ai

4.9 ★★★★★ (51)

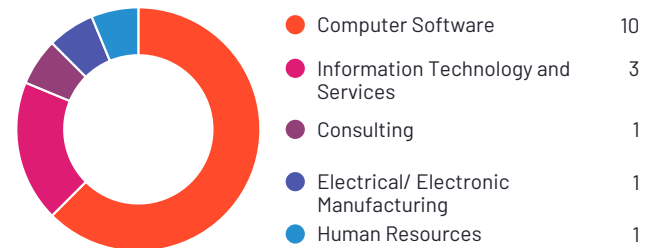


AutoRFP.ai has been named a High Performer product based on having high customer Satisfaction scores and a low Market Presence compared to the rest of the category. 100% of users rated it 4 or 5 stars, 100% of users believe it is headed in the right direction, and users said they would be likely to recommend AutoRFP.ai at a rate of 98%. AutoRFP.ai is also in the RFP category.

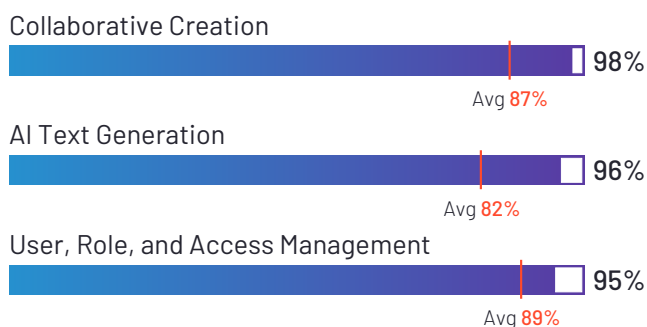
## Satisfaction Ratings



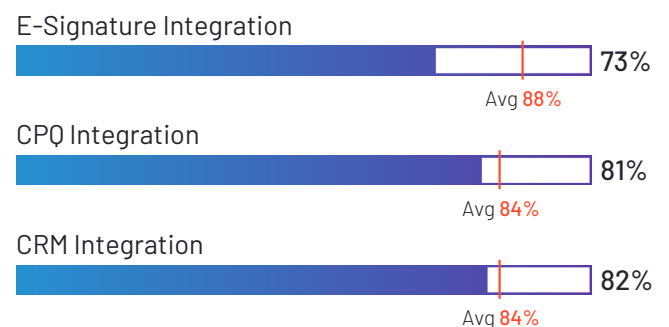
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
AutoRFP.ai



**HQ Location**  
Brisbane, QLD



**Year Founded**  
2022



**Employees (Listed On LinkedIn)**  
8



**Company Website**  
[autorfp.ai](https://autorfp.ai)



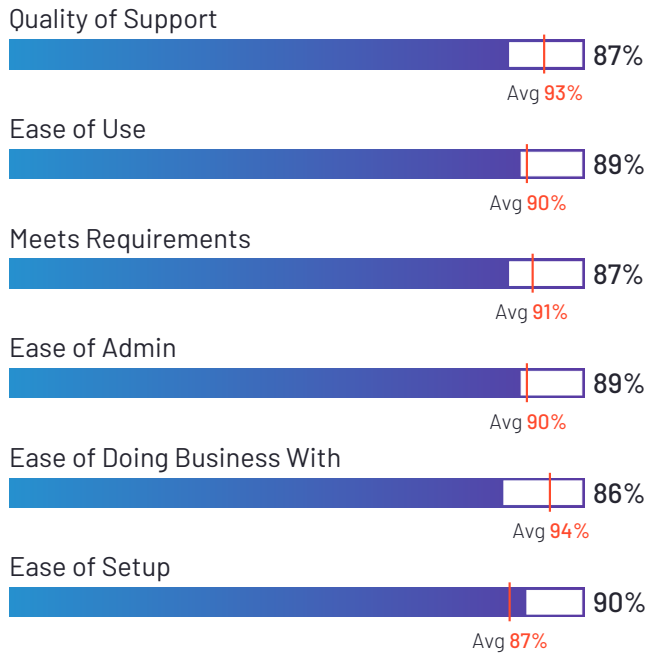
# Bonsai

4.3 ★★★★★ (101)

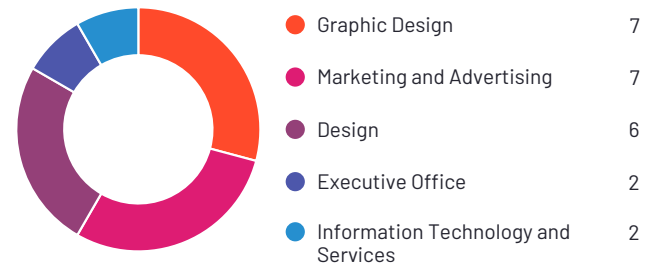


Bonsai has been named a High Performer product based on having high customer Satisfaction scores and a low Market Presence compared to the rest of the category. 91% of users rated it 4 or 5 stars, 94% of users believe it is headed in the right direction, and users said they would be likely to recommend Bonsai at a rate of 89%. Bonsai is also in the Freelance Tax, Project Collaboration, Work Management, Kanban Project Management, Resource Management, Workflow Management, Project Cost Management, Online Form Builder, Invoice Management, Task Management, Online Appointment Scheduling, Time Tracking, Expense Management, Professional Services Automation, Billing, Accounting, Training eLearning, Contract Management, Project and Portfolio Management, and Project Management categories.

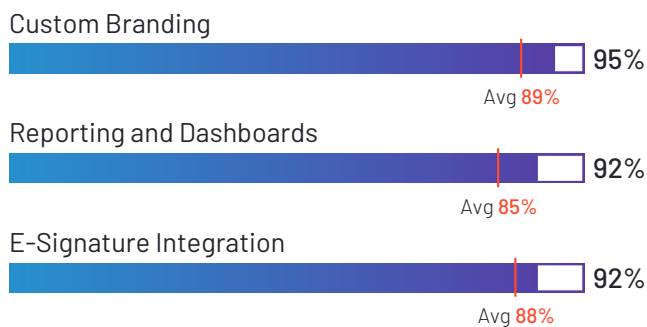
## Satisfaction Ratings



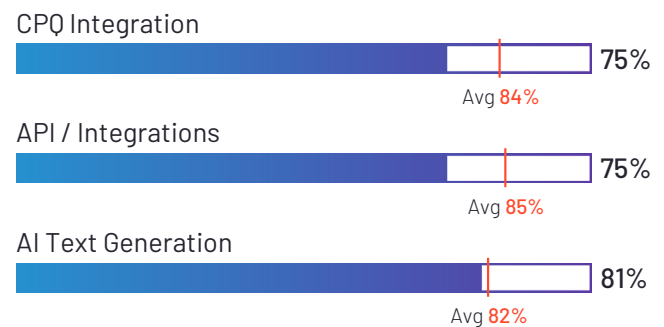
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
Bonsai (YC W16)



**HQ Location**  
San Francisco,  
California



**Year Founded**  
2015



**Employees (Listed  
On LinkedIn)**  
51



**Company Website**  
[hellobonsai.com](https://hellobonsai.com)



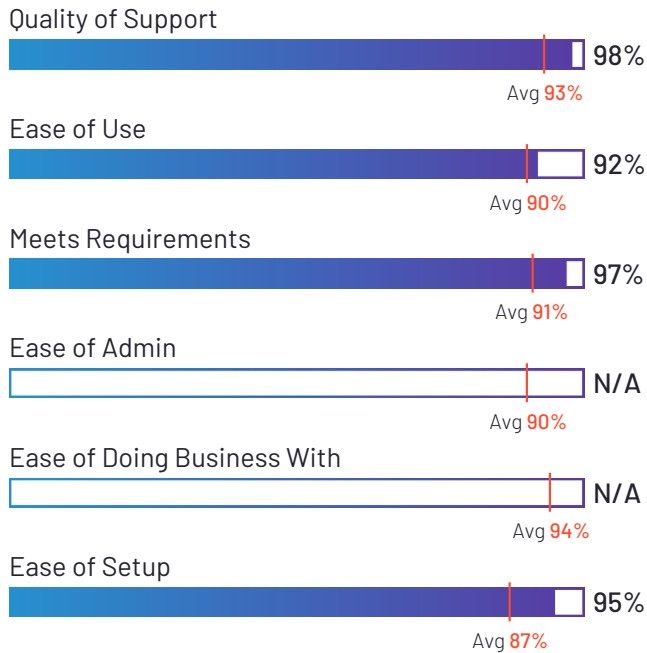
# Cone Propose

4.9 ★★★★★ (16)



Cone Propose has been named a High Performer product based on having high customer Satisfaction scores and a low Market Presence compared to the rest of the category. 100% of users rated it 4 or 5 stars, 100% of users believe it is headed in the right direction, and users said they would be likely to recommend Cone Propose at a rate of 97%.

## Satisfaction Ratings

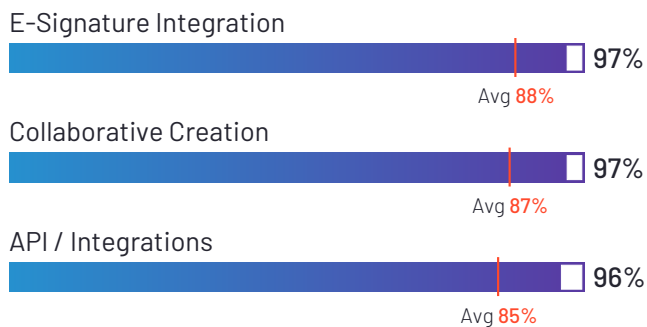


\*N/A is displayed when fewer than five responses were received for the question.

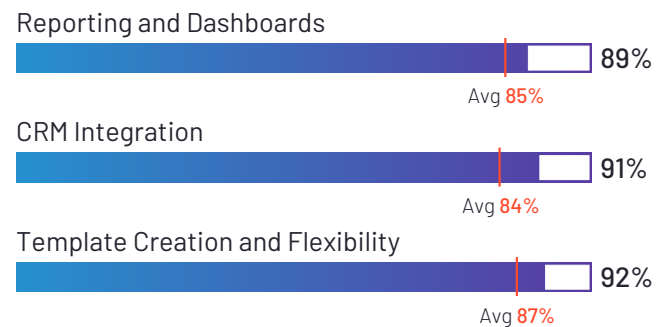
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



Ownership  
Cone



HQ Location  
United States



Year Founded  
2022



Employees (Listed  
On LinkedIn)  
15



Company Website  
[www.getcone.io](http://www.getcone.io)



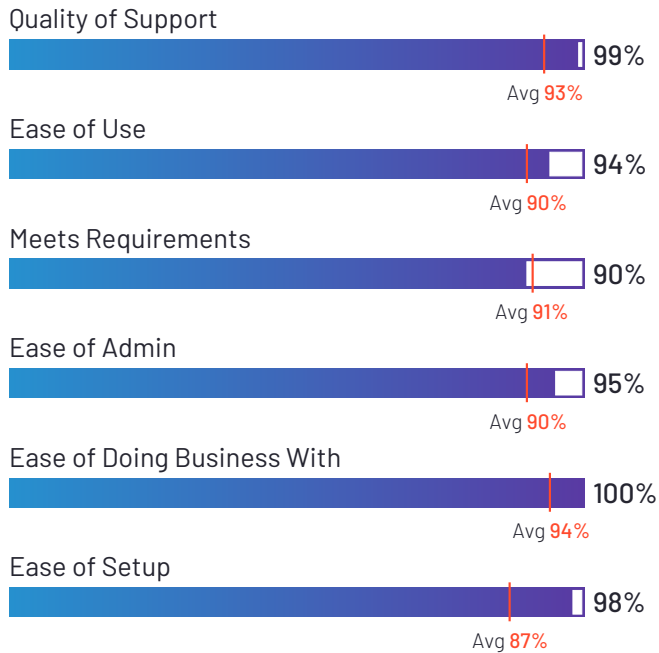
## Ombud

4.7 ★★★★★ (25)

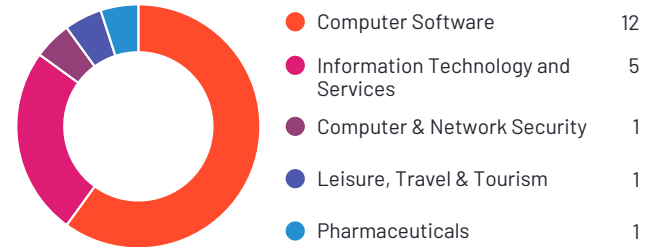


Ombud has been named a High Performer product based on having high customer Satisfaction scores and a low Market Presence compared to the rest of the category. 100% of users rated it 4 or 5 stars, 89% of users believe it is headed in the right direction, and users said they would be likely to recommend Ombud at a rate of 95%. Ombud is also in the RFP and Vendor Security and Privacy Assessment categories.

### Satisfaction Ratings



### Top Industries Represented



**Ownership**  
Ombud



**HQ Location**  
Denver, Colorado



**Year Founded**  
2011



**Employees (Listed On LinkedIn)**  
45



**Company Website**  
[www.ombud.com](http://www.ombud.com)



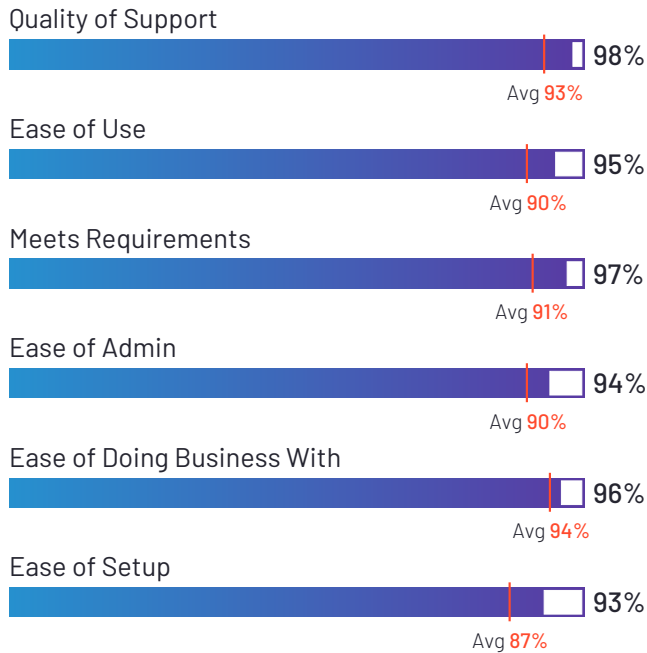
## Zilliant CPQ

4.8 ★★★★★ (30)

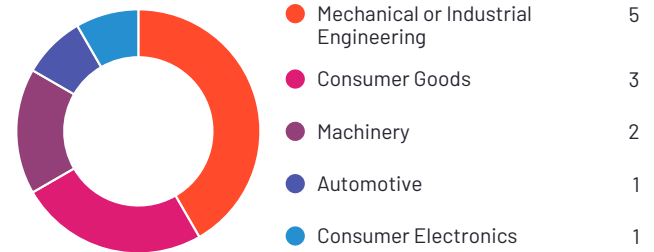


Zilliant CPQ has been named a High Performer product based on having high customer Satisfaction scores and a low Market Presence compared to the rest of the category. 100% of users rated it 4 or 5 stars, 64% of users believe it is headed in the right direction, and users said they would be likely to recommend Zilliant CPQ at a rate of 96%. Zilliant CPQ is also in the Quote-to-Cash, Visual Configuration, CRM, Pricing, E-Commerce Platforms, CPQ, and SAP Store categories.

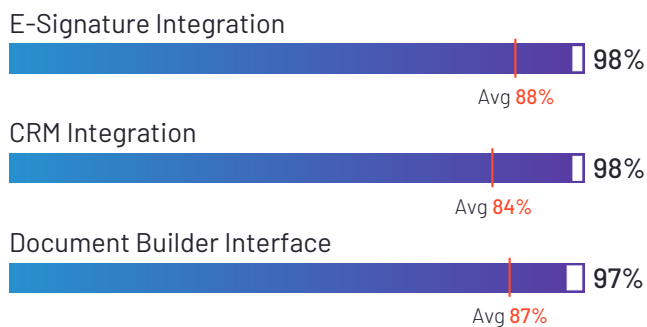
### Satisfaction Ratings



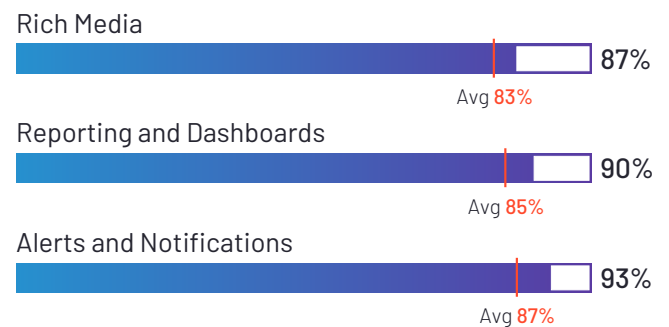
### Top Industries Represented



### Highest-Rated Features



### Lowest-Rated Features



**Ownership**  
Zilliant



**HQ Location**  
Austin, TX



**Year Founded**  
1999



**Employees (Listed On LinkedIn)**  
239



**Company Website**  
[zilliant.com](https://zilliant.com)



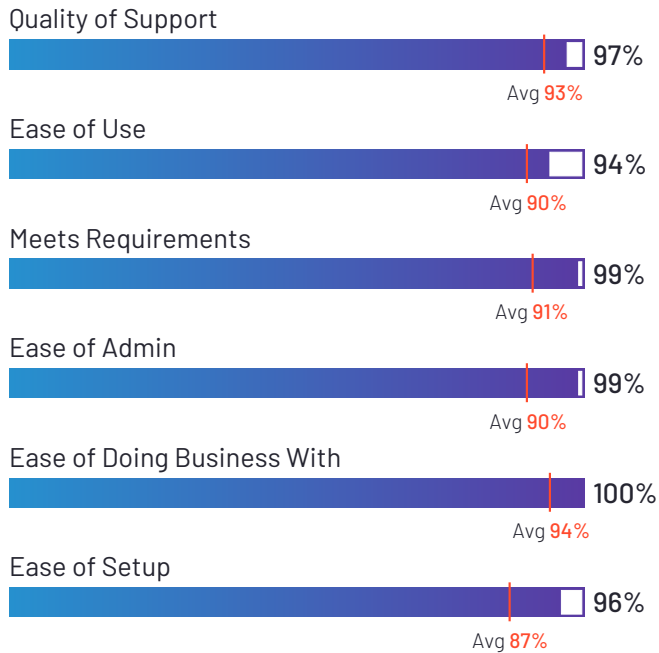
# Nusii

4.5 ★★★★★ (24)

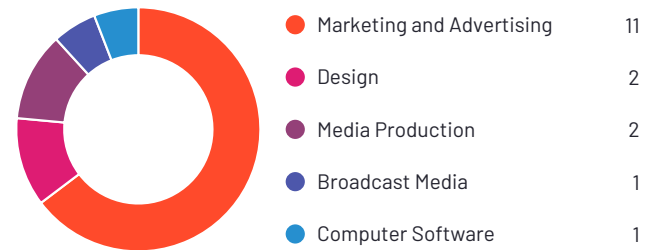


Nusii has been named a High Performer product based on having high customer Satisfaction scores and a low Market Presence compared to the rest of the category. 92% of users rated it 4 or 5 stars, 89% of users believe it is headed in the right direction, and users said they would be likely to recommend Nusii at a rate of 90%.

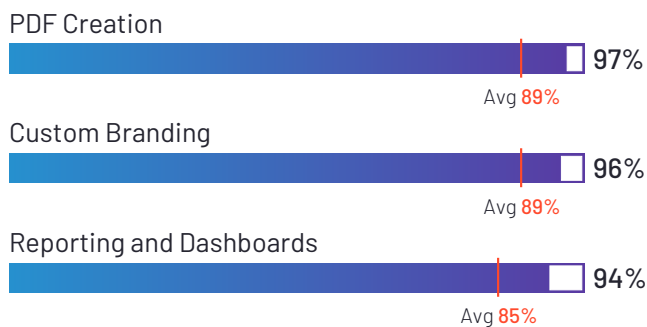
## Satisfaction Ratings



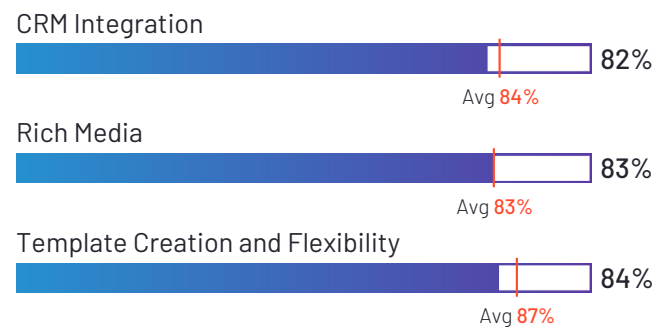
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



Ownership  
Nusii



HQ Location  
MADRID



Year Founded  
2013



Employees (Listed  
On LinkedIn)  
1



Company Website  
[nusii.com](https://nusii.com)

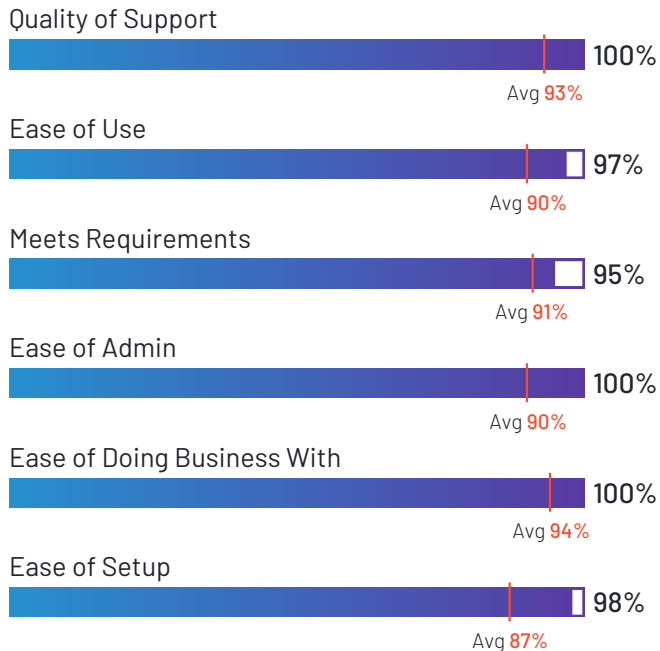
**tango**

5.0 ★★★★★ (10)

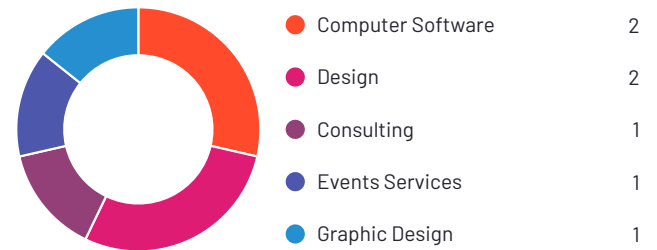


Tango Agreements has been named a High Performer product based on having high customer Satisfaction scores and a low Market Presence compared to the rest of the category. 100% of users rated it 4 or 5 stars, 100% of users believe it is headed in the right direction, and users said they would be likely to recommend Tango Agreements at a rate of 99%.

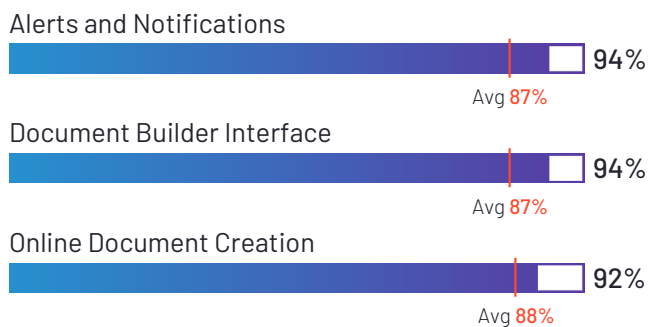
## Satisfaction Ratings



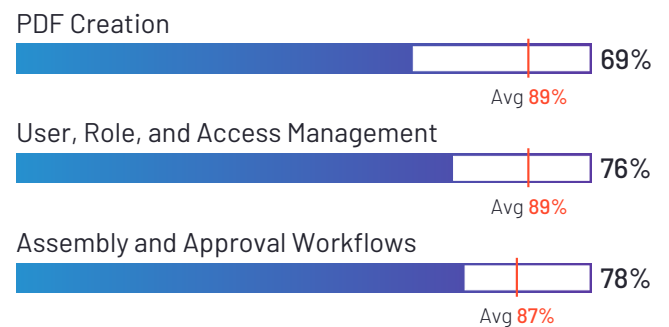
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
Tango Agreements



**HQ Location**  
Burleigh Heads, AU



**Year Founded**  
2022



**Employees (Listed On LinkedIn)**  
8



**Company Website**  
[tangoagreements.com](https://tangoagreements.com)



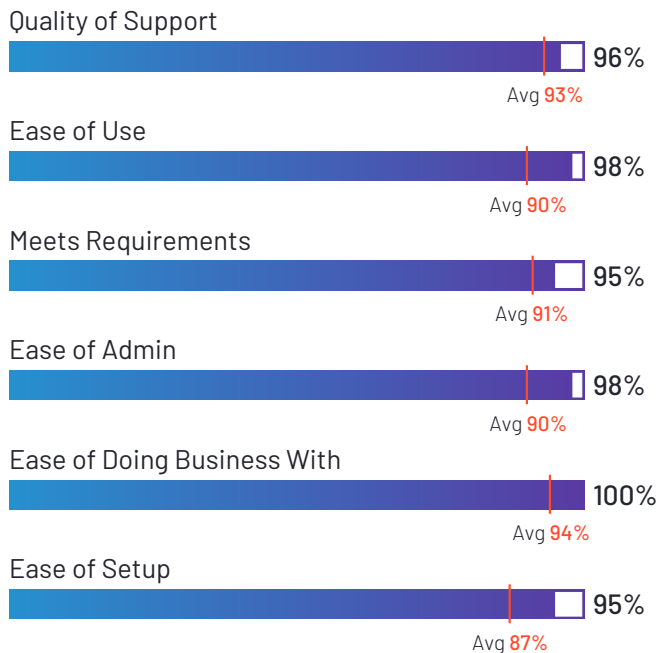
# Clientary

4.7 ★★★★★ (45)

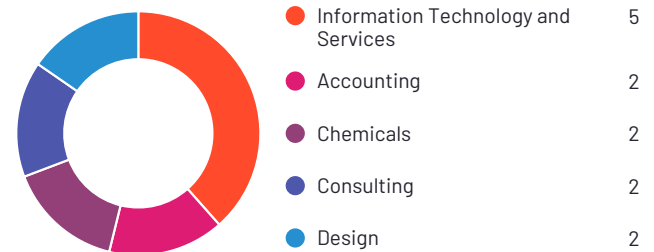


Clientary has been named a High Performer product based on having high customer Satisfaction scores and a low Market Presence compared to the rest of the category. 100% of users rated it 4 or 5 stars, 100% of users believe it is headed in the right direction, and users said they would be likely to recommend Clientary at a rate of 94%. Clientary is also in the Time Tracking, E-Signature, Billing, Online Form Builder, and Client Portal categories.

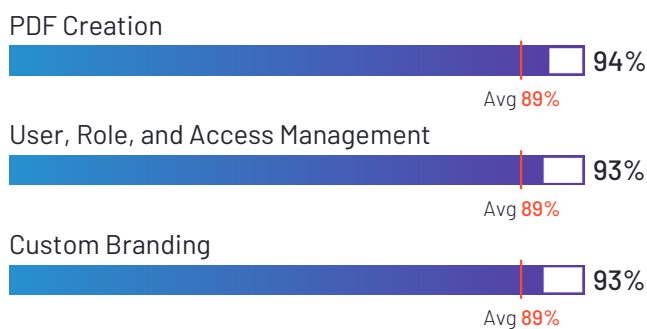
## Satisfaction Ratings



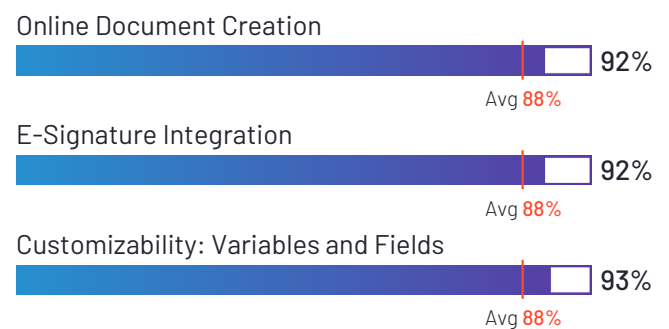
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
Unbrew



**HQ Location**  
San Jose, CA



**Year Founded**  
2008



**Employees (Listed On LinkedIn)**  
2



**Company Website**  
[clientary.com](https://clientary.com)



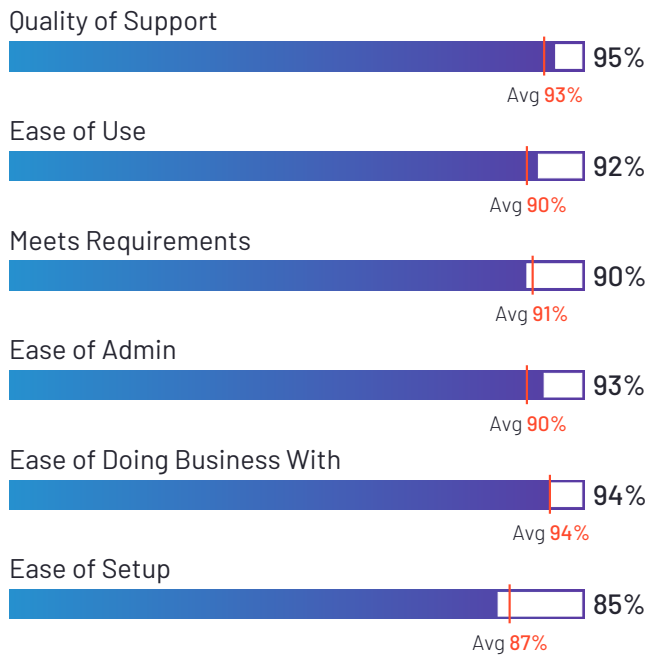
# Flowcase

4.6 ★★★★★ (23)



Flowcase has been named a High Performer product based on having high customer Satisfaction scores and a low Market Presence compared to the rest of the category. 96% of users rated it 4 or 5 stars, 82% of users believe it is headed in the right direction, and users said they would be likely to recommend Flowcase at a rate of 92%. Flowcase is also in the RFP category.

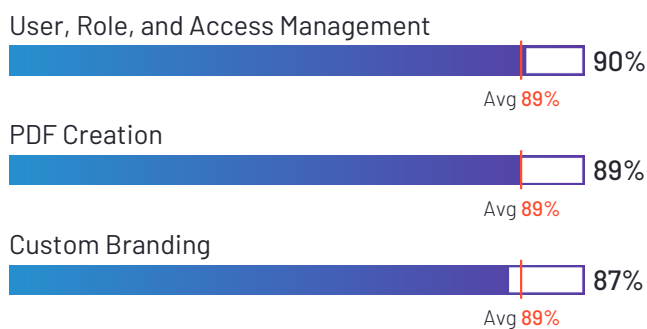
## Satisfaction Ratings



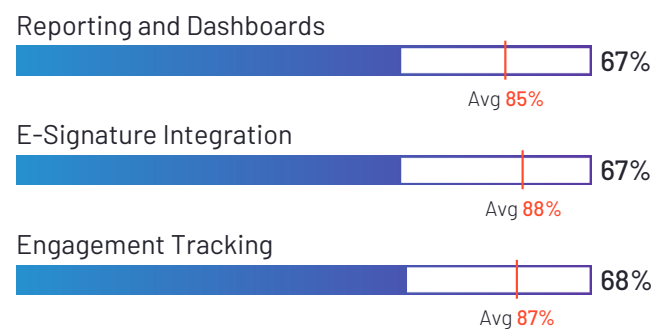
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
Flowcase (formerly  
CV Partner)



**HQ Location**  
London, England



**Year Founded**  
2012



**Employees (Listed  
On LinkedIn)**  
51



**Company Website**  
[flowcase.com](https://flowcase.com)



## PROPOSAL KIT



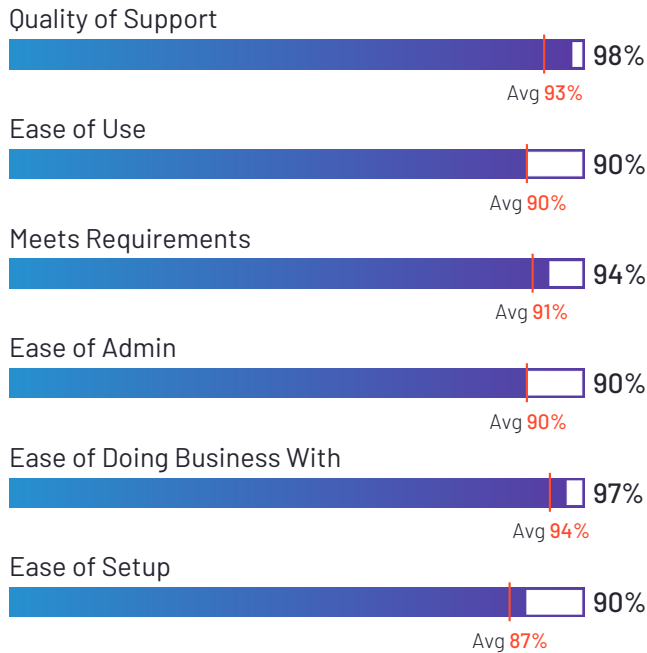
## Proposal Kit

4.7 ★★★★★ (18)

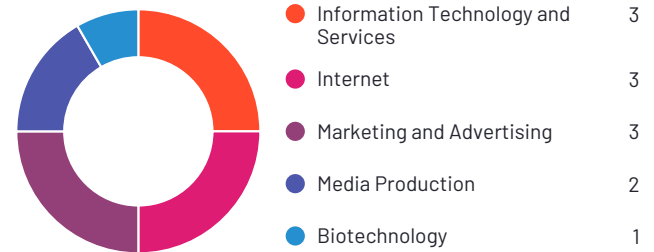


Proposal Kit has been named a High Performer product based on having high customer Satisfaction scores and a low Market Presence compared to the rest of the category. 94% of users rated it 4 or 5 stars, 89% of users believe it is headed in the right direction, and users said they would be likely to recommend Proposal Kit at a rate of 93%.

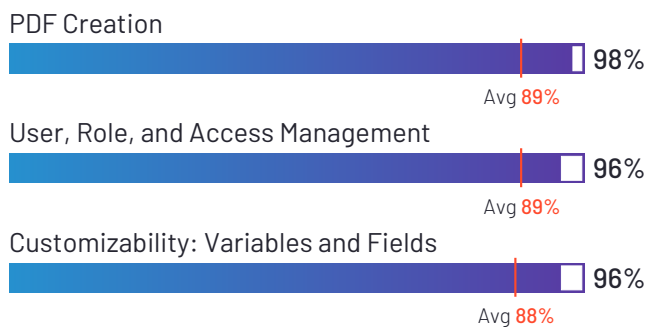
## Satisfaction Ratings



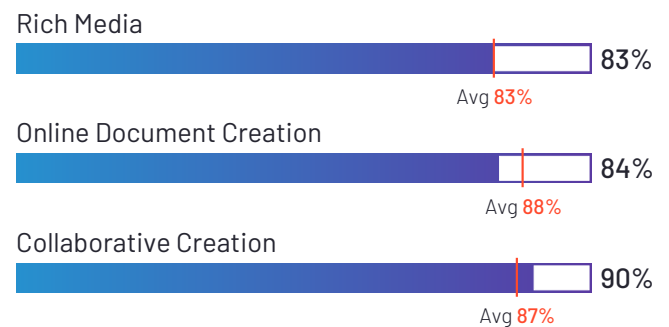
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
Proposal Kit



**HQ Location**  
Redmond, WA



**Year Founded**  
1997



**Employees (Listed On LinkedIn)**  
3



**Company Website**  
[proposalkit.com](https://proposalkit.com)



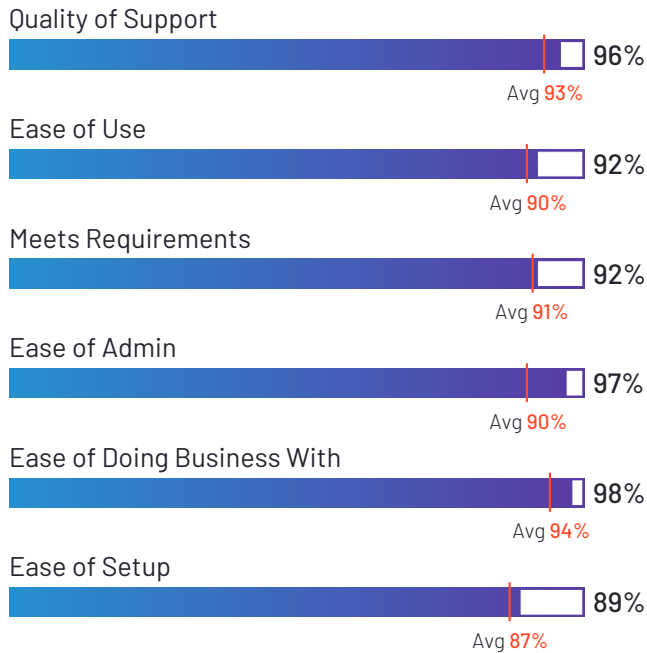
## ScalePad Quoter

4.7 ★★★★★ (44)



ScalePad Quoter has been named a High Performer product based on having high customer Satisfaction scores and a low Market Presence compared to the rest of the category. 100% of users rated it 4 or 5 stars, 100% of users believe it is headed in the right direction, and users said they would be likely to recommend ScalePad Quoter at a rate of 94%. ScalePad Quoter is also in the Quote-to-Cash, E-Signature, Pricing, CPQ, and Contract Management categories.

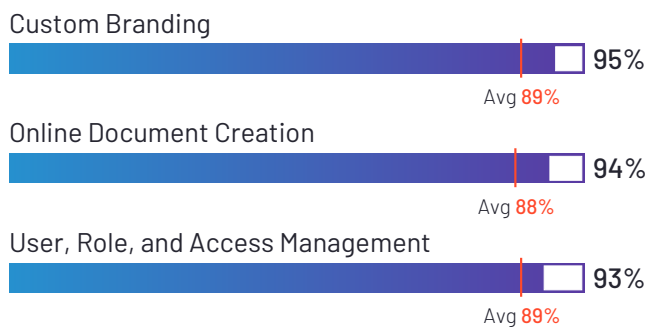
### Satisfaction Ratings



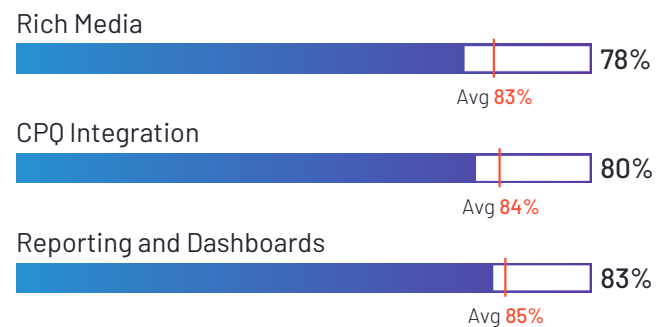
### Top Industries Represented



### Highest-Rated Features



### Lowest-Rated Features



**Ownership**  
ScalePad



**HQ Location**  
Vancouver, BC



**Year Founded**  
2015



**Employees (Listed On LinkedIn)**  
243



**Company Website**  
[scalepad.com](https://scalepad.com)



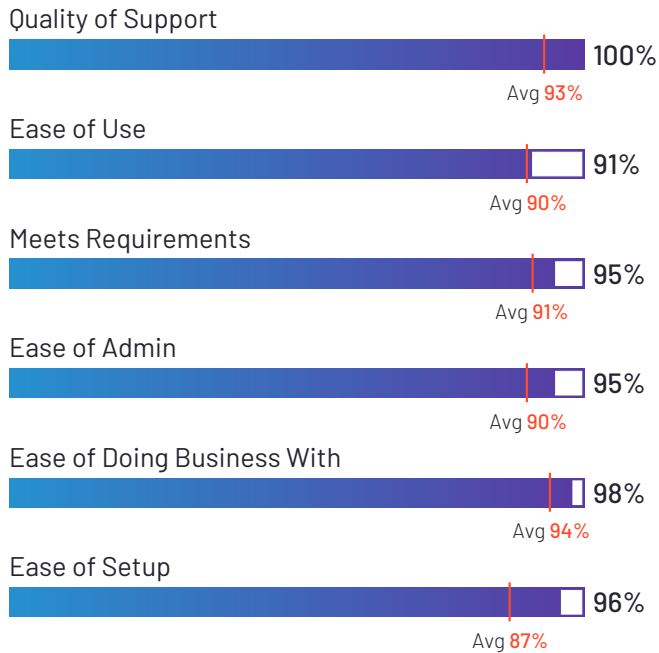
## Fresh Proposals

4.8 ★★★★★ (15)



Fresh Proposals has been named a High Performer product based on having high customer Satisfaction scores and a low Market Presence compared to the rest of the category. 100% of users rated it 4 or 5 stars, 100% of users believe it is headed in the right direction, and users said they would be likely to recommend Fresh Proposals at a rate of 95%.

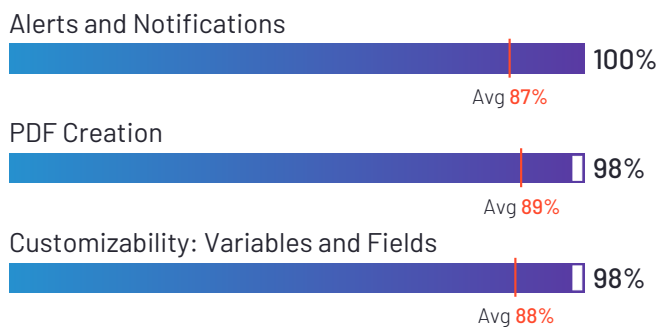
### Satisfaction Ratings



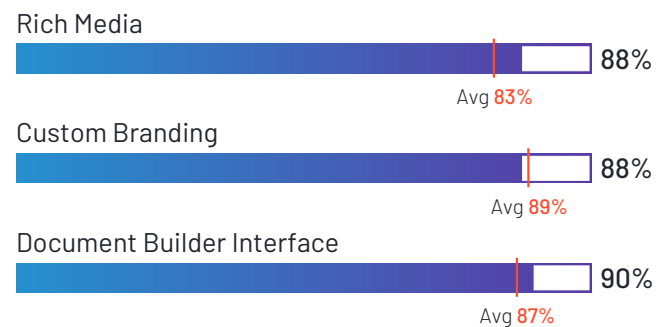
### Top Industries Represented



### Highest-Rated Features



### Lowest-Rated Features



**Ownership**  
Fresh Proposals



**Year Founded**  
2019



**Employees (Listed  
On LinkedIn)**  
8



**Company Website**  
[freshproposals.com](https://freshproposals.com)



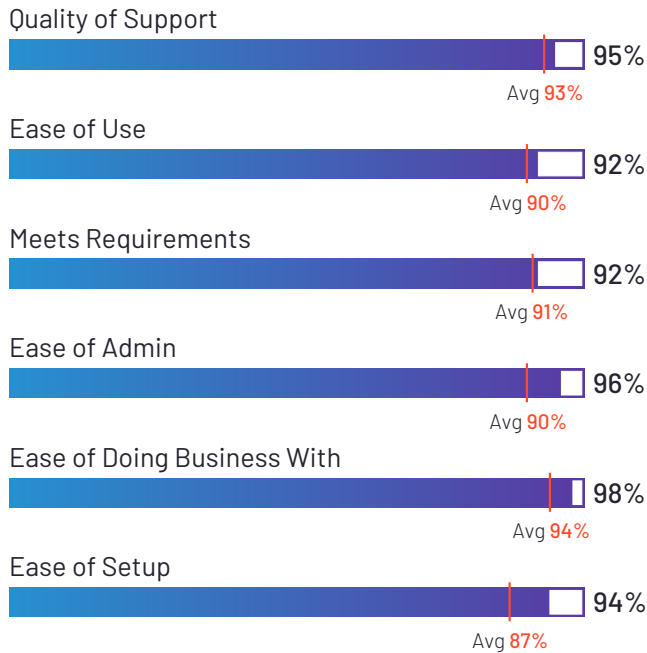
# RevOps

4.7 ★★★★★ (29)

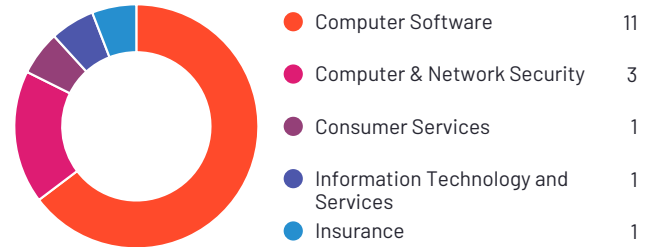


RevOps has been named a High Performer product based on having high customer Satisfaction scores and a low Market Presence compared to the rest of the category. 100% of users rated it 4 or 5 stars, 100% of users believe it is headed in the right direction, and users said they would be likely to recommend RevOps at a rate of 94%. RevOps is also in the CPQ category.

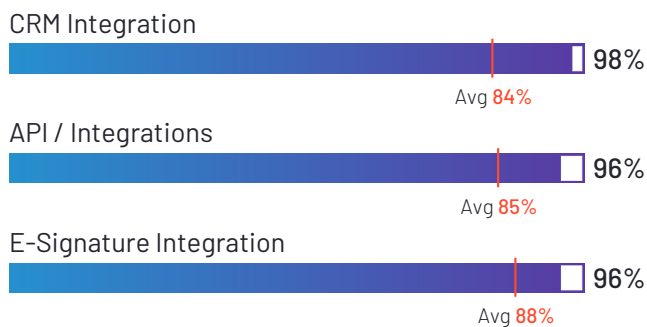
## Satisfaction Ratings



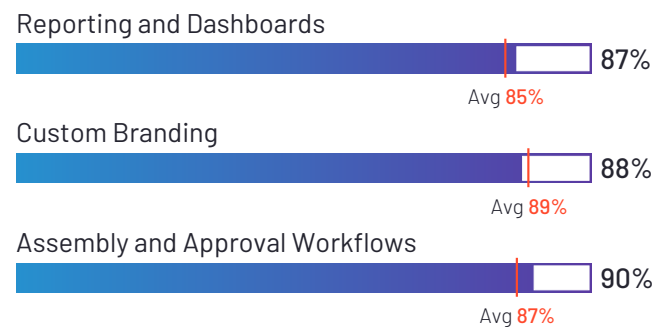
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
RevOps



**HQ Location**  
San Francisco,  
California



**Year Founded**  
2018



**Employees (Listed  
On LinkedIn)**  
9



**Company Website**  
[www.revops.io](http://www.revops.io)



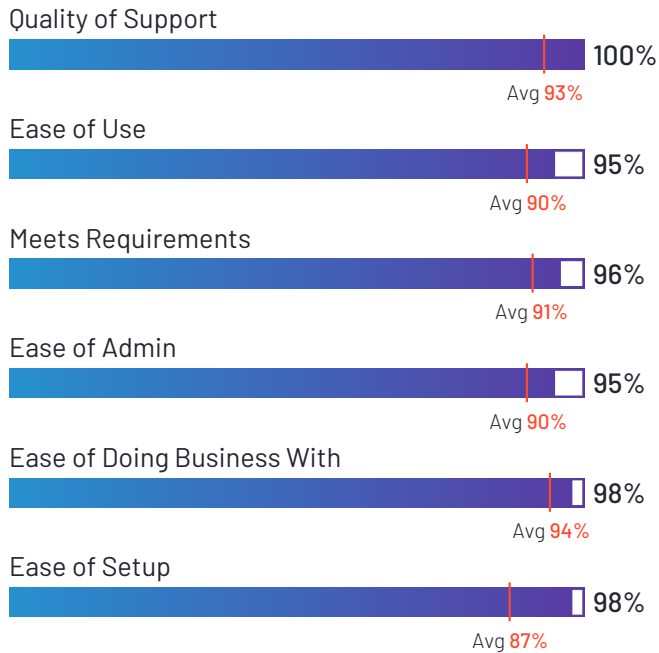
# Tilkee

4.6 ★★★★★ (11)

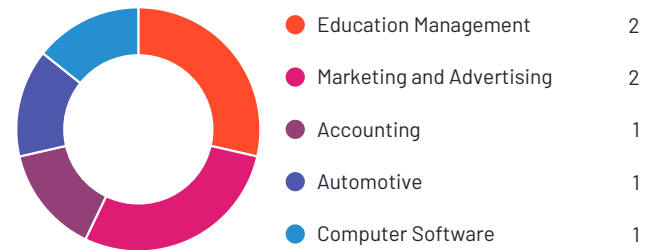


Tilkee has been named a High Performer product based on having high customer Satisfaction scores and a low Market Presence compared to the rest of the category. 91% of users rated it 4 or 5 stars, 91% of users believe it is headed in the right direction, and users said they would be likely to recommend Tilkee at a rate of 92%.

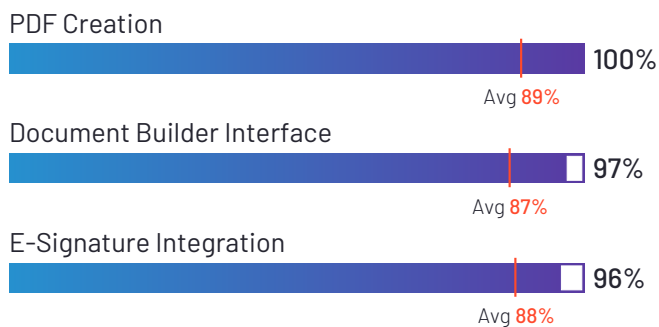
## Satisfaction Ratings



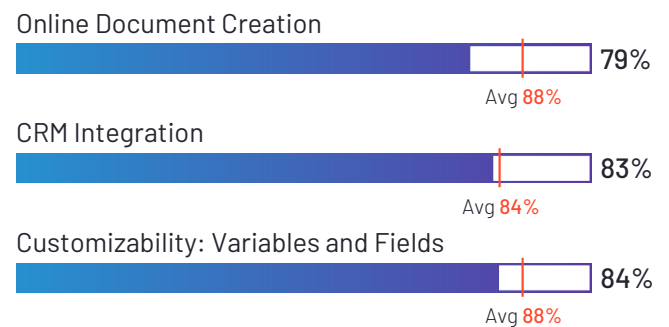
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
Tilkee



**HQ Location**  
Lyon, France



**Year Founded**  
2014



**Employees (Listed On LinkedIn)**  
6



**Company Website**  
[www.tilkee.com](http://www.tilkee.com)

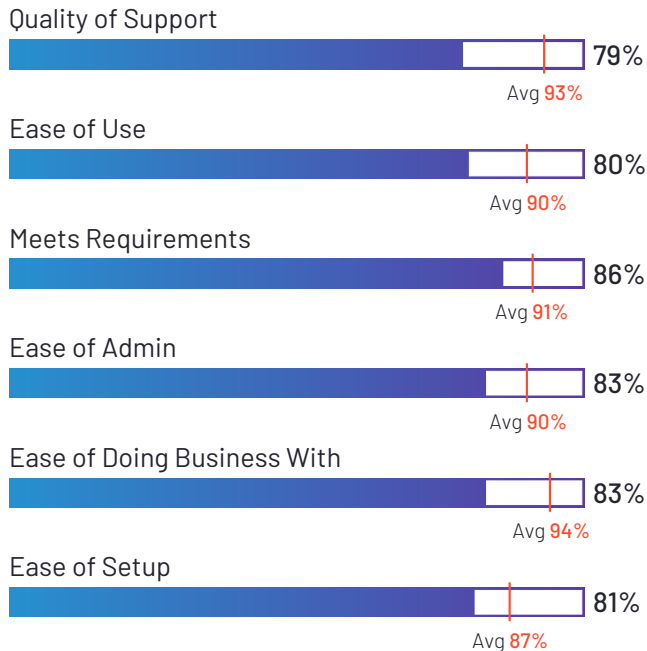
**ORACLE**  
Configure, Price,  
and Quote Cloud

## Oracle CPQ

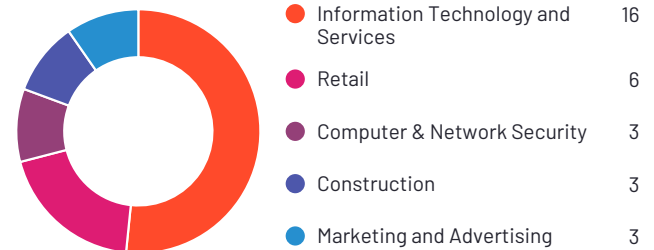
4.0 ★★★★★ (258)

Oracle CPQ has been named a Contender product based on having a relatively low customer Satisfaction score and large Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. Oracle CPQ has the largest Market Presence among products in Proposal. 83% of users rated it 4 or 5 stars, 77% of users believe it is headed in the right direction, and users said they would be likely to recommend Oracle CPQ at a rate of 80%. Oracle CPQ is also in the CPQ category.

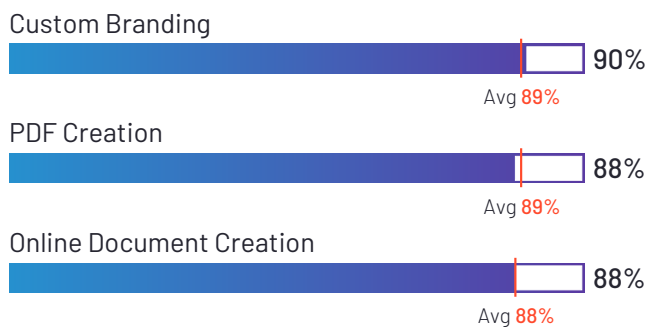
### Satisfaction Ratings



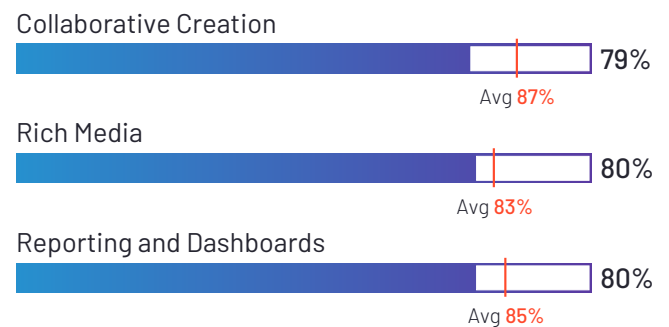
### Top Industries Represented



### Highest-Rated Features



### Lowest-Rated Features



**Ownership**  
Oracle



**HQ Location**  
Austin, TX



**Year Founded**  
1977



**Employees (Listed  
On LinkedIn)**  
204,855



**Company Website**  
[www.oracle.com](http://www.oracle.com)

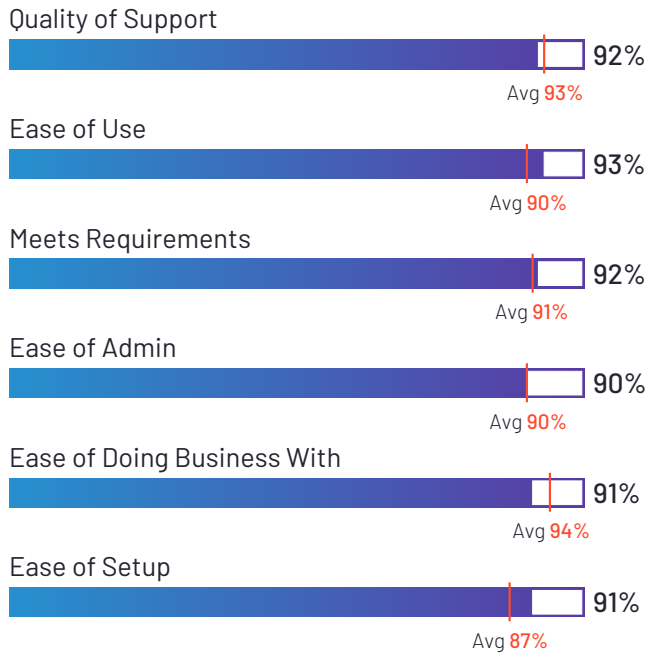


# DocSend

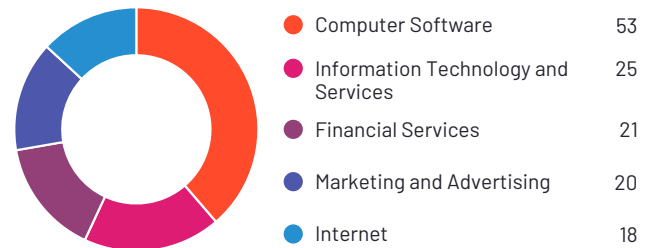
4.6 ★★★★★ (529)

DocSend has been named a Contender product based on having a relatively low customer Satisfaction score and large Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. 97% of users rated it 4 or 5 stars, 91% of users believe it is headed in the right direction, and users said they would be likely to recommend DocSend at a rate of 94%. DocSend is also in the Video Communications, Virtual Data Room (VDR), Sales Enablement, Cloud Content Collaboration, Screen and Video Capture, E-Signature, and Client Portal categories.

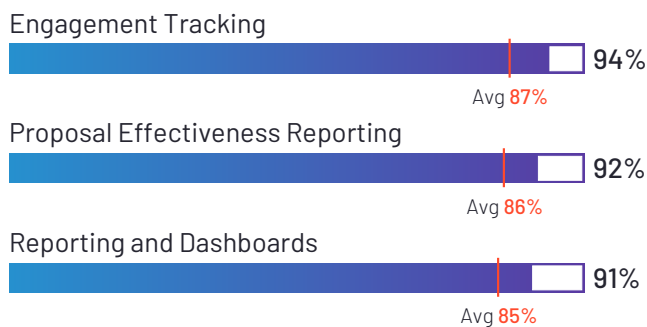
## Satisfaction Ratings



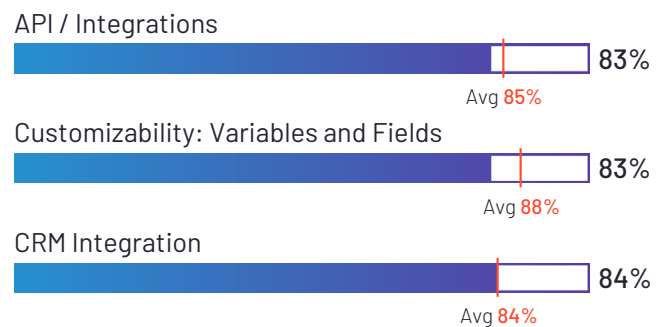
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
Dropbox



**HQ Location**  
San Francisco,  
California



**Year Founded**  
2007



**Employees (Listed  
On LinkedIn)**  
3,595



**Company Website**  
[dropbox.com](https://dropbox.com)

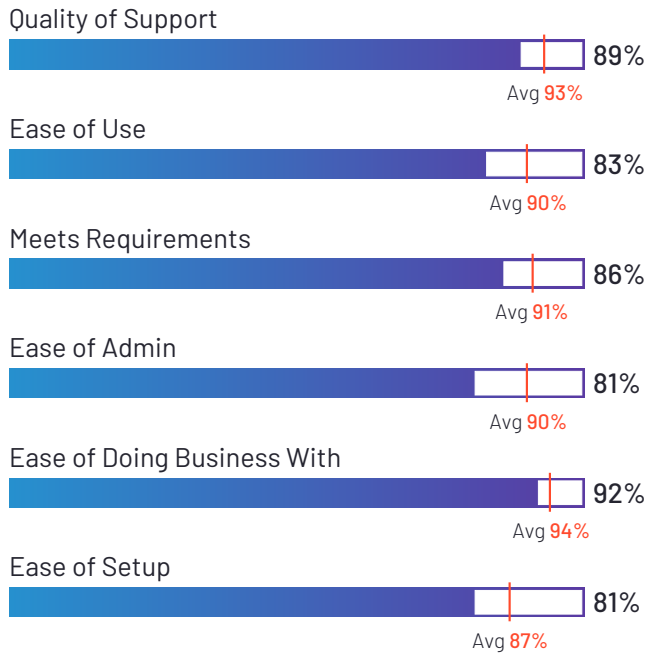


## Upland Qvidian

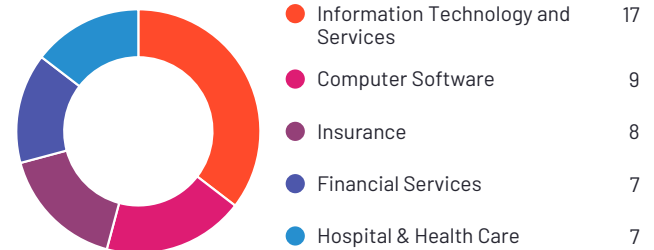
4.3 ★★★★★ (133)

Upland Qvidian has been named a Contender product based on having a relatively low customer Satisfaction score and large Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. 93% of users rated it 4 or 5 stars, 89% of users believe it is headed in the right direction, and users said they would be likely to recommend Upland Qvidian at a rate of 86%. Upland Qvidian is also in the RFP category.

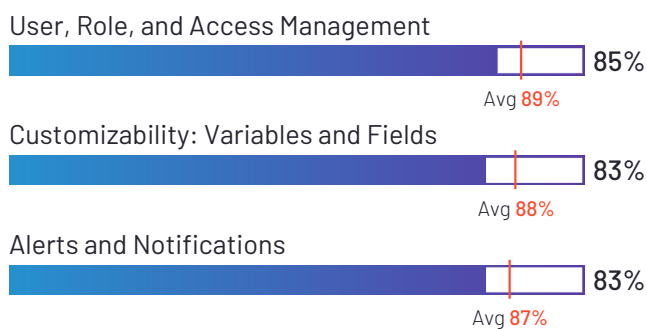
### Satisfaction Ratings



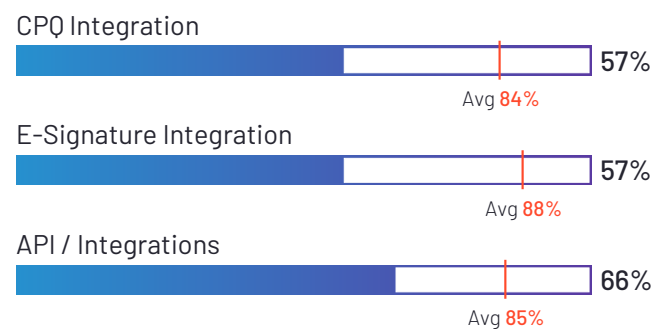
### Top Industries Represented



### Highest-Rated Features



### Lowest-Rated Features



**Ownership**  
Upland Software



**HQ Location**  
Austin, TX



**Year Founded**  
2010



**Employees (Listed On LinkedIn)**  
954



**Company Website**  
[uplandsoftware.com](https://uplandsoftware.com)

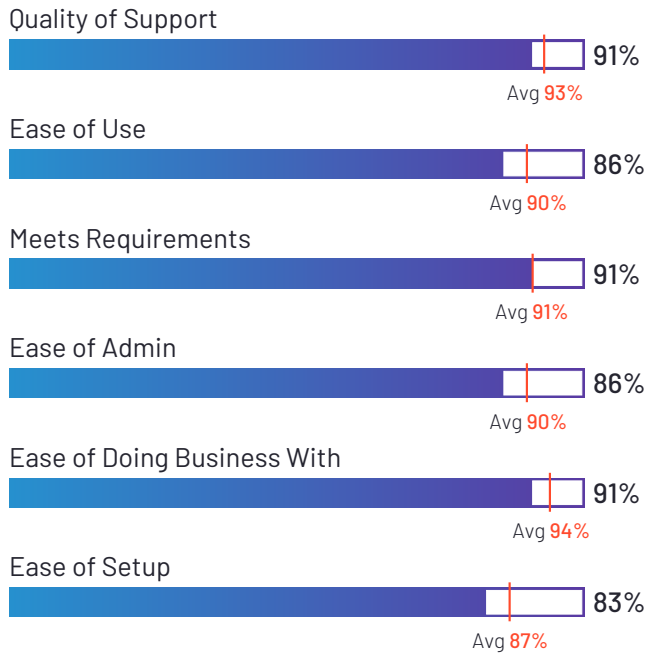


# Conga Composer

4.4 ★★★★★ (844)

Conga Composer has been named a Contender product based on having a relatively low customer Satisfaction score and large Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. 93% of users rated it 4 or 5 stars, 86% of users believe it is headed in the right direction, and users said they would be likely to recommend Conga Composer at a rate of 88%. Conga Composer is also in the Document Generation, Salesforce CRM Document Generation, Document Creation, Salesforce AppExchange Apps, API Documentation Management, and Document Management categories.

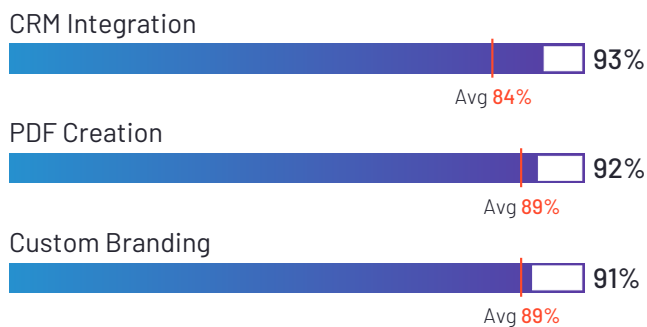
## Satisfaction Ratings



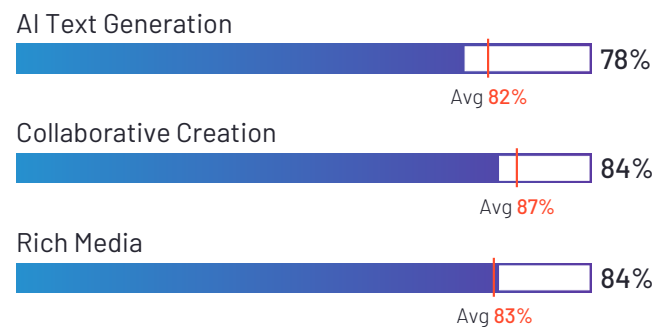
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
Conga



**HQ Location**  
Broomfield, CO



**Year Founded**  
2006



**Employees (Listed On LinkedIn)**  
1,828



**Company Website**  
[conga.com](https://conga.com)

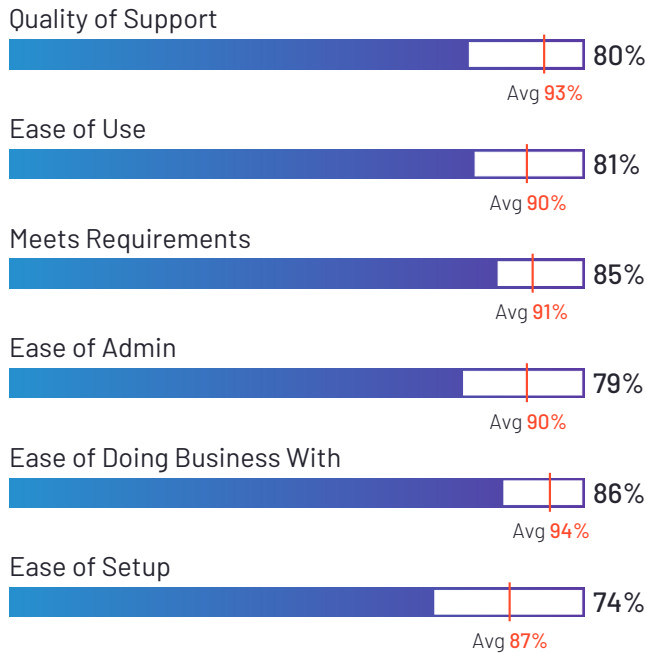


## ConnectWise CPQ

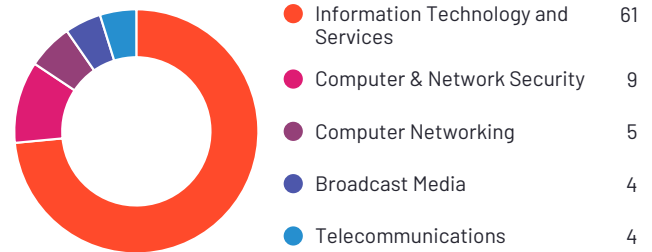
4.0 ★★★★★ (139)

ConnectWise CPQ has been named a Contender product based on having a relatively low customer Satisfaction score and large Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. 84% of users rated it 4 or 5 stars, 78% of users believe it is headed in the right direction, and users said they would be likely to recommend ConnectWise CPQ at a rate of 81%. ConnectWise CPQ is also in the CPQ, E-Signature, and Quote-to-Cash categories.

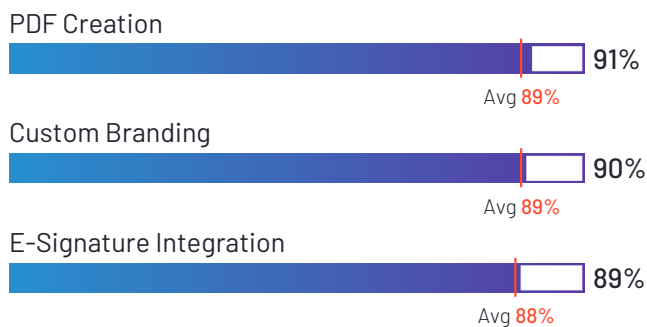
### Satisfaction Ratings



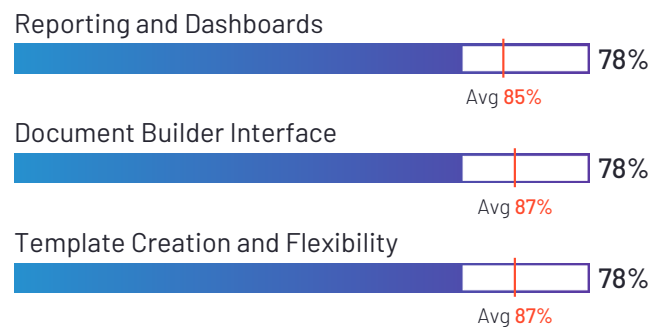
### Top Industries Represented



### Highest-Rated Features



### Lowest-Rated Features



**Ownership**  
ConnectWise



**HQ Location**  
Tampa, FL



**Year Founded**  
1982



**Employees (Listed On LinkedIn)**  
3,224



**Company Website**  
[connectwise.com](https://connectwise.com)

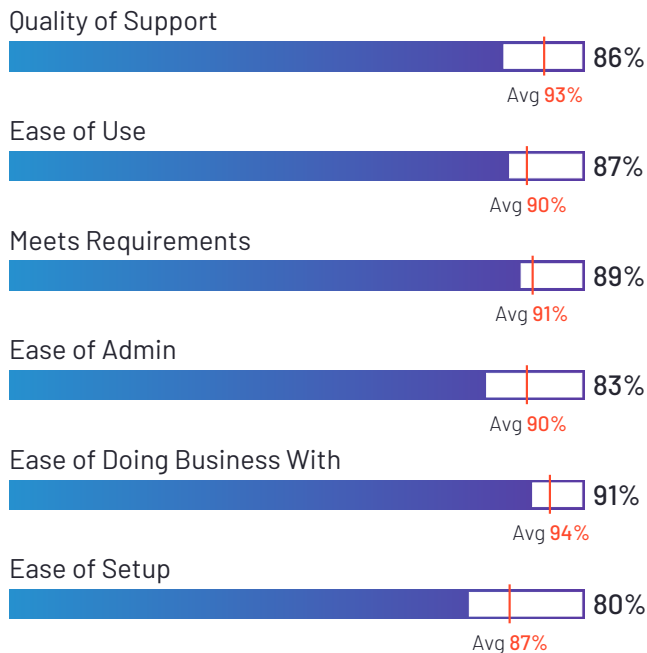


## Odoo Sales

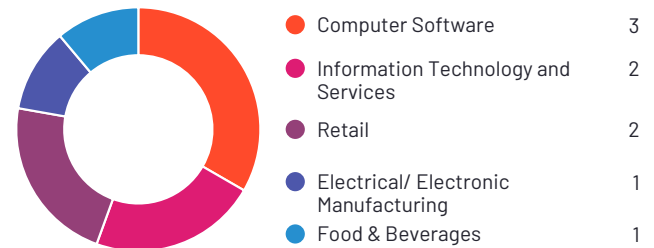
4.6 ★★★★★ (13)

Odoo Sales has been named a Contender product based on having a relatively low customer Satisfaction score and large Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. 92% of users rated it 4 or 5 stars, 100% of users believe it is headed in the right direction, and users said they would be likely to recommend Odoo Sales at a rate of 92%.

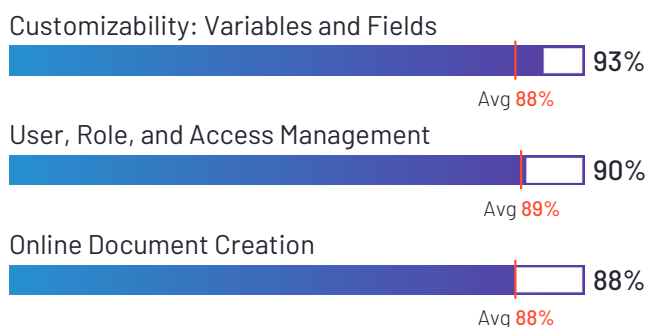
### Satisfaction Ratings



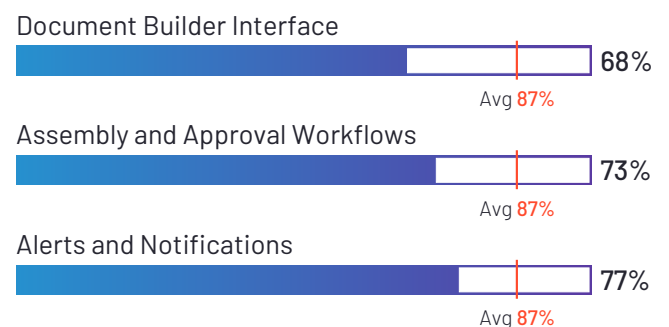
### Top Industries Represented



### Highest-Rated Features



### Lowest-Rated Features



**Ownership**  
Odoo



**HQ Location**  
Brussels, Belgium



**Year Founded**  
2005



**Employees (Listed On LinkedIn)**  
6,171



**Company Website**  
[www.odoo.com](http://www.odoo.com)

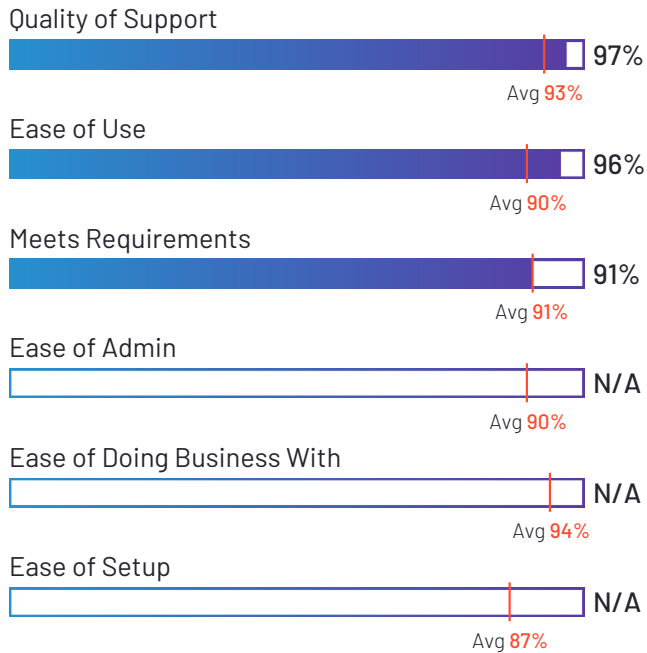


## Fiverr Workspace

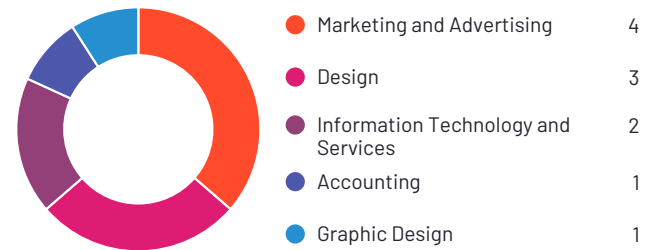
4.1 ★★★★★ (21)

Fiverr Workspace has been named a Contender product based on having a relatively low customer Satisfaction score and large Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. 94% of users rated it 4 or 5 stars, 87% of users believe it is headed in the right direction, and users said they would be likely to recommend Fiverr Workspace at a rate of 90%. Fiverr Workspace is also in the Invoice Management, Time Tracking, and Billing categories.

### Satisfaction Ratings



### Top Industries Represented



\*N/A is displayed when fewer than five responses were received for the question.



**Ownership**  
Fiverr



**HQ Location**  
Tel-Aviv



**Year Founded**  
2010



**Employees (Listed On LinkedIn)**  
212,456



**Company Website**  
[www.fiverr.com](http://www.fiverr.com)

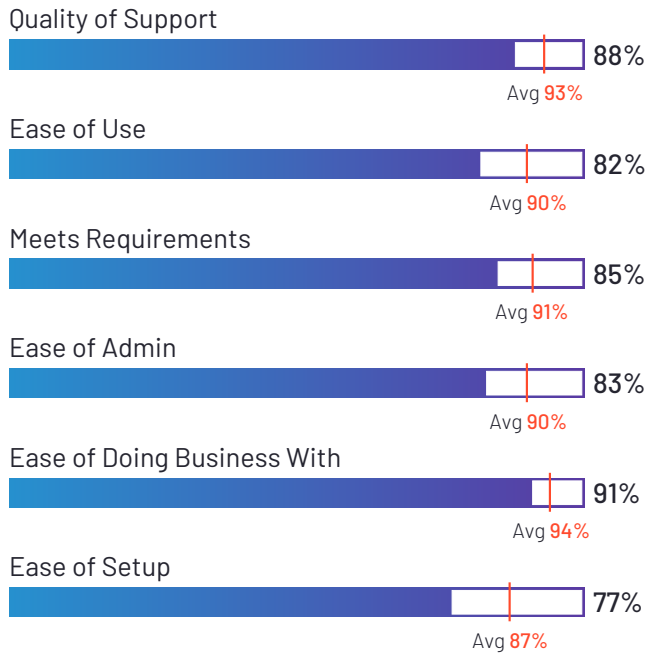


## Conga CLM

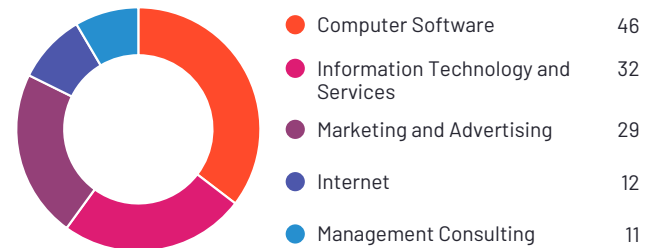
4.2 ★★★★★ (560)

Conga CLM has been named a Contender product based on having a relatively low customer Satisfaction score and large Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. 87% of users rated it 4 or 5 stars, 88% of users believe it is headed in the right direction, and users said they would be likely to recommend Conga CLM at a rate of 84%. Conga CLM is also in the Contract Lifecycle Management (CLM), Contract Analytics, Salesforce AppExchange Apps, Contract Management, and Legal Document Management categories.

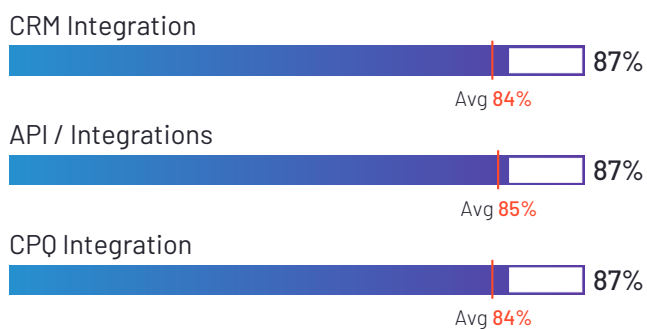
### Satisfaction Ratings



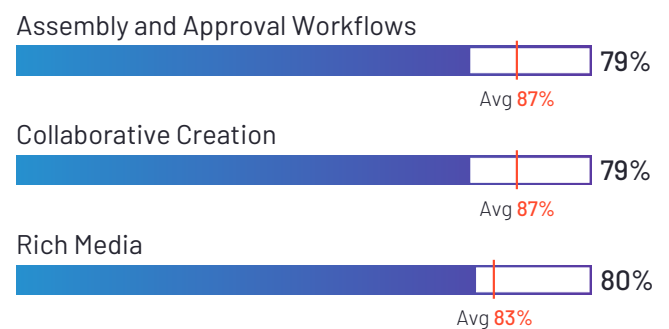
### Top Industries Represented



### Highest-Rated Features



### Lowest-Rated Features



**Ownership**  
Conga



**HQ Location**  
Broomfield, CO



**Year Founded**  
2006



**Employees (Listed On LinkedIn)**  
1,828



**Company Website**  
[conga.com](https://conga.com)

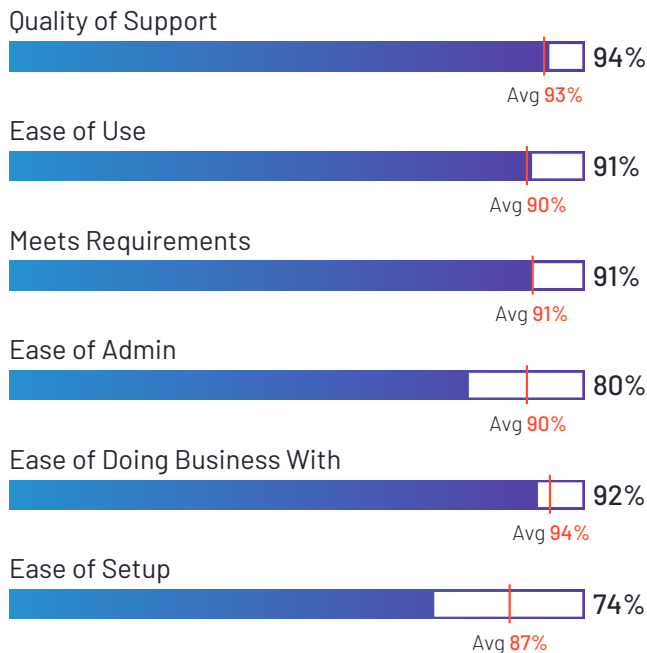


## Epicor CPQ

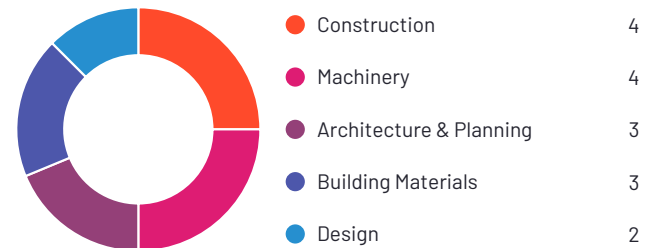
4.5 ★★★★★ (98)

Epicor CPQ has been named a Contender product based on having a relatively low customer Satisfaction score and large Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. 100% of users rated it 4 or 5 stars, 97% of users believe it is headed in the right direction, and users said they would be likely to recommend Epicor CPQ at a rate of 93%. Epicor CPQ is also in the Visual Product Customization, Visual Configuration, Pricing, CPQ, and AR Visualization categories.

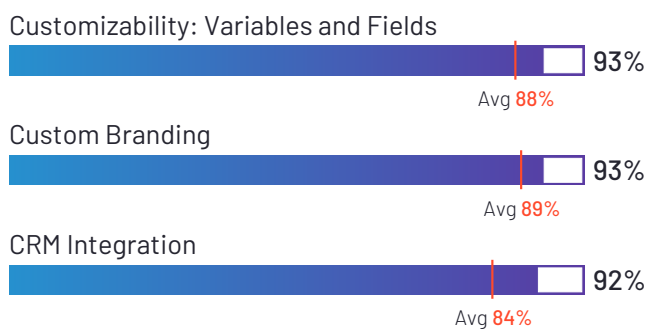
### Satisfaction Ratings



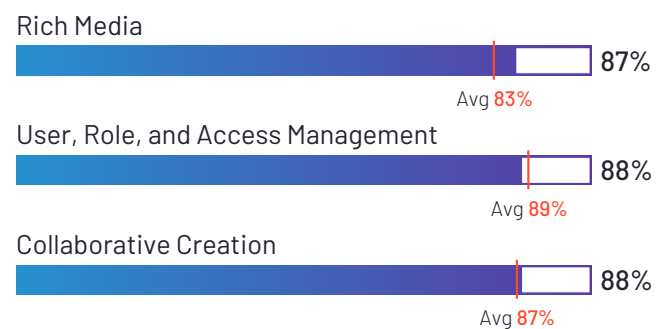
### Top Industries Represented



### Highest-Rated Features



### Lowest-Rated Features



Ownership  
Epicor



HQ Location  
Austin, TX



Year Founded  
1972



Employees (Listed  
On LinkedIn)  
5,845



Company Website  
[www.epicor.com](http://www.epicor.com)

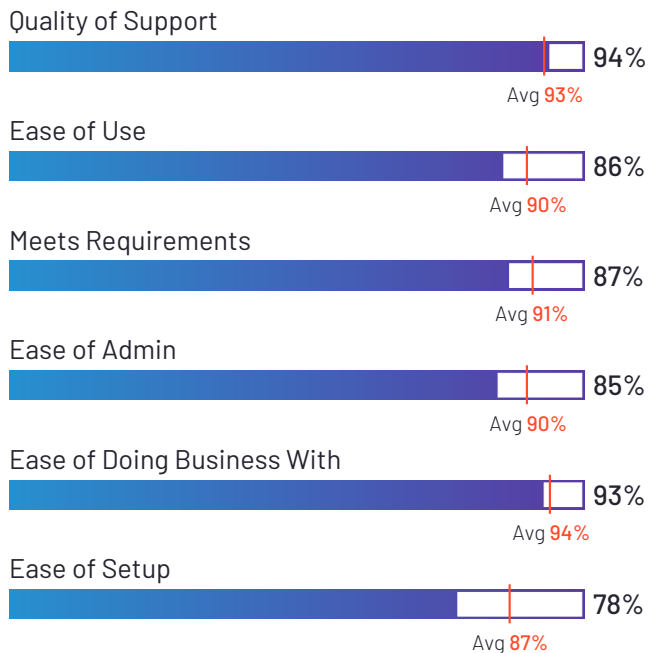


# QorusDocs

4.4 ★★★★★ (167)

QorusDocs has been named a Contender product based on having a relatively low customer Satisfaction score and large Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. 93% of users rated it 4 or 5 stars, 89% of users believe it is headed in the right direction, and users said they would be likely to recommend QorusDocs at a rate of 88%. QorusDocs is also in the RFP, Sales Enablement, and Document Generation categories.

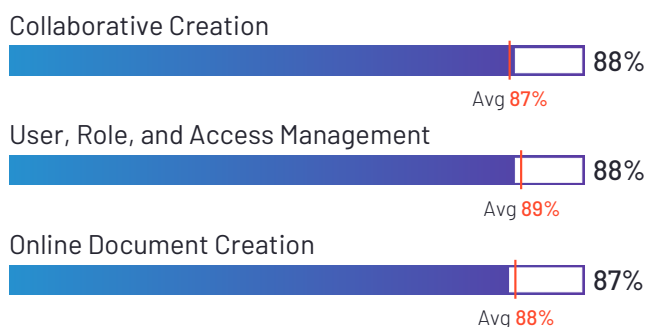
## Satisfaction Ratings



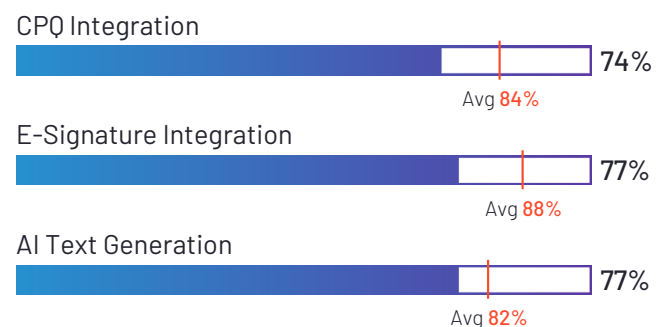
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
QorusDocs



**HQ Location**  
Seattle, WA



**Year Founded**  
2012



**Employees (Listed On LinkedIn)**  
60



**Company Website**  
[qorusdocs.com](https://qorusdocs.com)

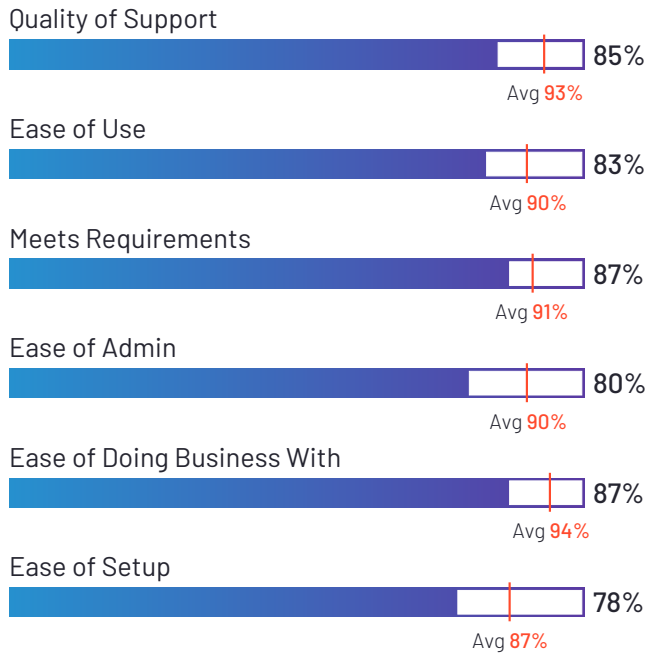


# Nintex

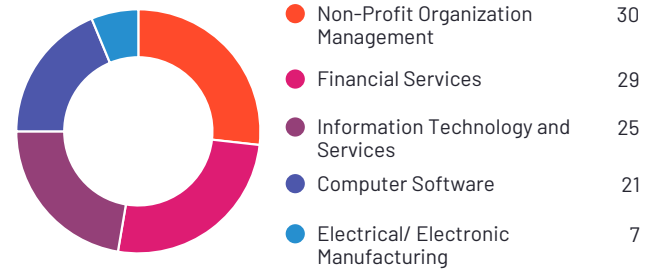
4.2 ★★★★★ (1,311)

Nintex has been named a Contender product based on having a relatively low customer Satisfaction score and large Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. 88% of users rated it 4 or 5 stars, 79% of users believe it is headed in the right direction, and users said they would be likely to recommend Nintex at a rate of 83%. Nintex is also in the Application Development Platforms, Digital Process Automation (DPA), Robotic Process Automation (RPA), Document Generation, No-Code Development Platforms, Business Process Management, E-Signature, and Salesforce CRM Document Generation categories.

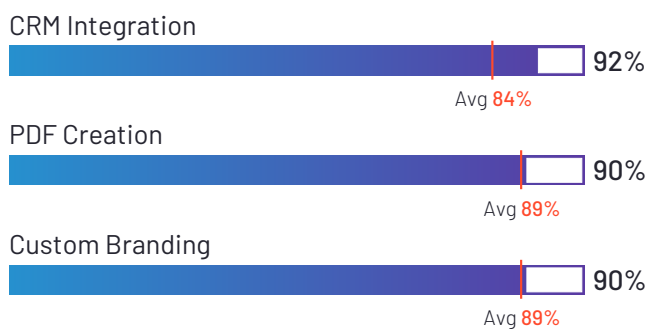
## Satisfaction Ratings



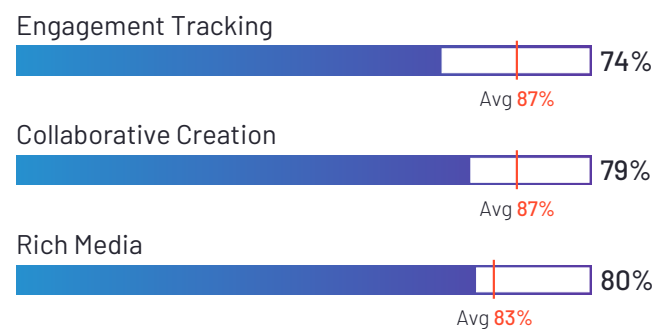
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
Nintex



**HQ Location**  
Bellevue, WA



**Year Founded**  
2006



**Employees (Listed On LinkedIn)**  
1,226



**Company Website**  
[www.nintex.com](http://www.nintex.com)

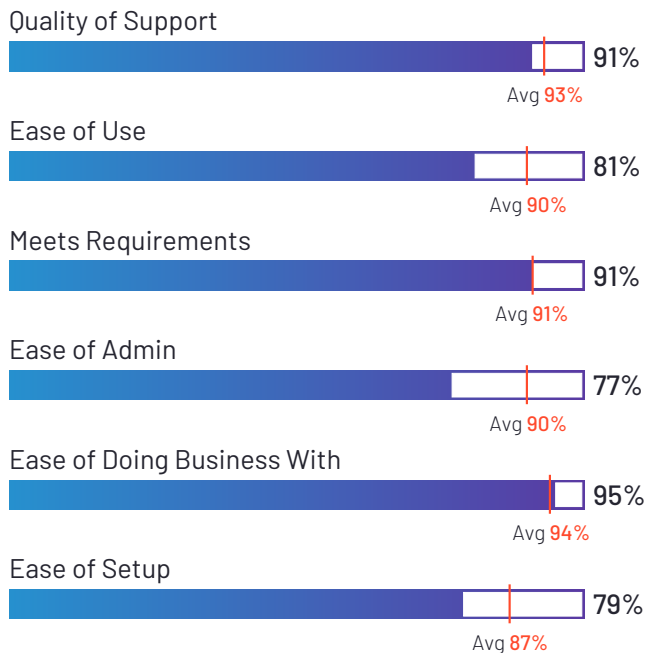


# Vendavo

4.4 ★★★★★ (65)

Vendavo has been named a Contender product based on having a relatively low customer Satisfaction score and large Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. 94% of users rated it 4 or 5 stars, 91% of users believe it is headed in the right direction, and users said they would be likely to recommend Vendavo at a rate of 88%. Vendavo is also in the Quote-to-Cash, Visual Configuration, Pricing, CPQ, Rebate Management, and SAP Store categories.

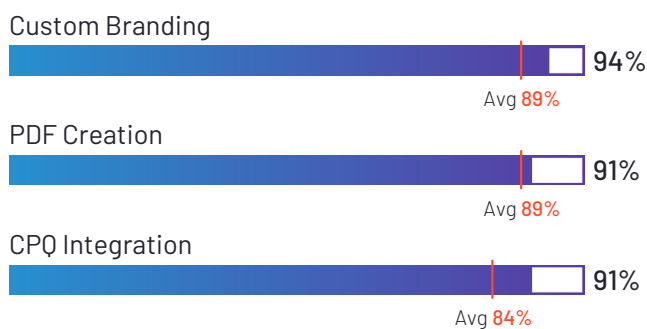
## Satisfaction Ratings



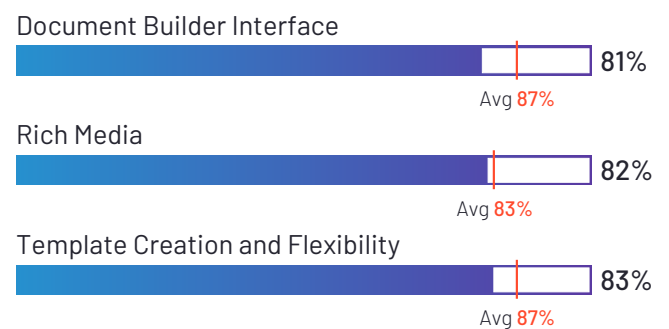
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
Vendavo



**HQ Location**  
Denver, Colorado



**Year Founded**  
1998



**Employees (Listed On LinkedIn)**  
527



**Company Website**  
[vendavo.com](https://vendavo.com)

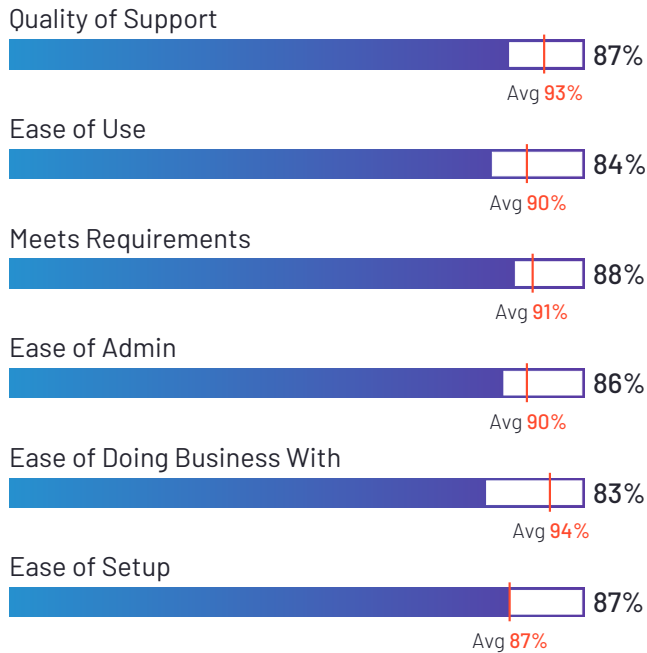


# Ideagen PleaseReview

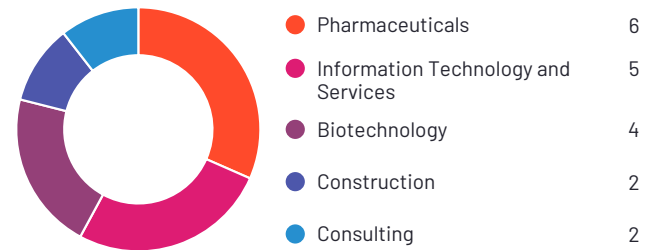
4.3 ★★★★★ (69)

Ideagen PleaseReview has been named a Contender product based on having a relatively low customer Satisfaction score and large Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. 96% of users rated it 4 or 5 stars, 82% of users believe it is headed in the right direction, and users said they would be likely to recommend Ideagen PleaseReview at a rate of 89%. Ideagen PleaseReview is also in the Pharma and Biotech, Document Creation, and Enterprise Content Management (ECM) categories.

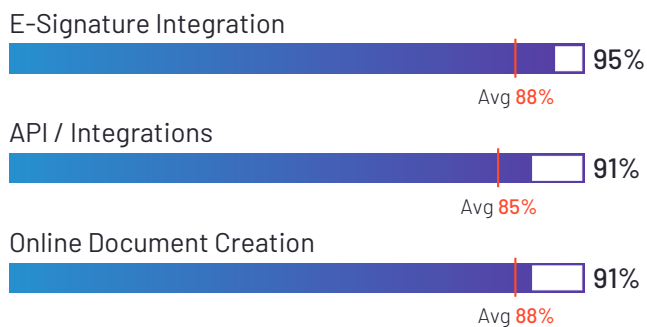
## Satisfaction Ratings



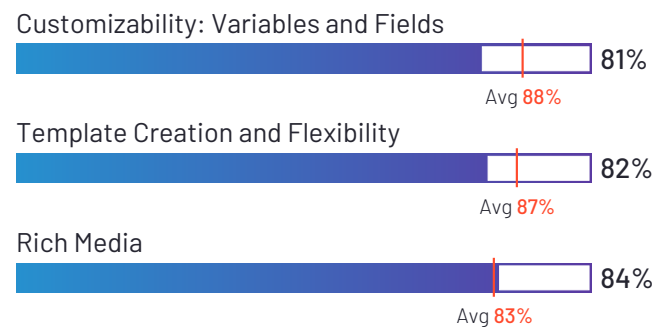
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
Ideagen



**HQ Location**  
Ruddington,  
Nottingham



**Year Founded**  
2000



**Employees (Listed  
On LinkedIn)**  
1,193



**Company Website**  
[ideagen.com](https://ideagen.com)

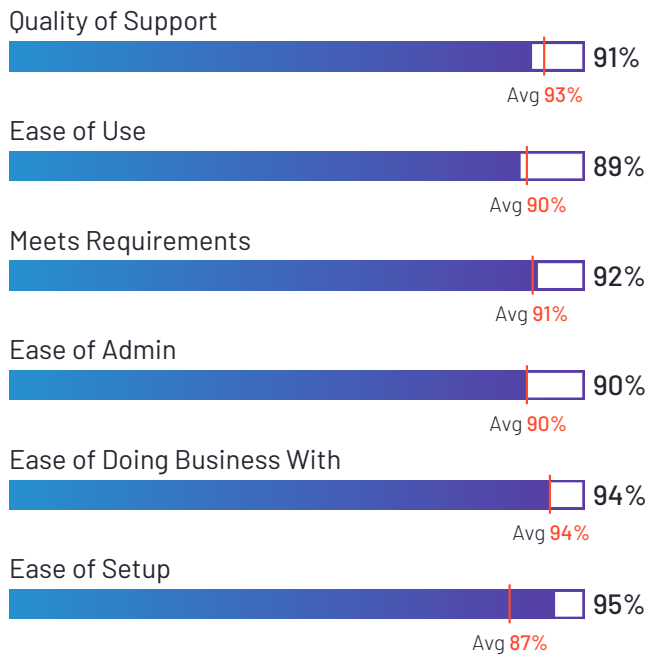


# Storydoc

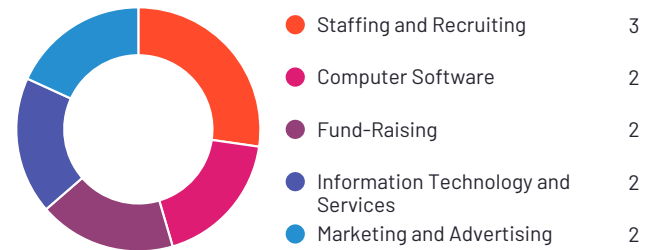
4.7 ★★★★★ (55)

Storydoc has been named a Niche product based on having a relatively low Satisfaction score and low Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. 94% of users rated it 4 or 5 stars, 94% of users believe it is headed in the right direction, and users said they would be likely to recommend Storydoc at a rate of 92%. Storydoc is also in the Sales Enablement and Presentation categories.

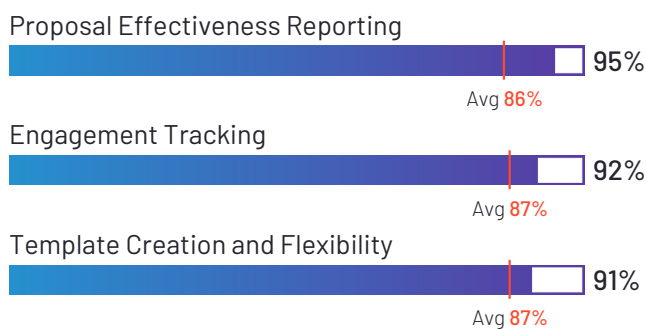
## Satisfaction Ratings



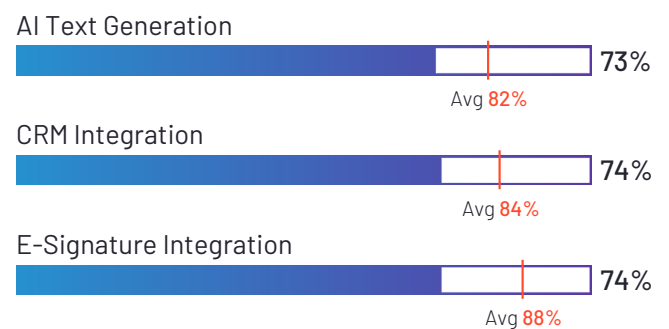
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
Storydoc



**HQ Location**  
Tel Aviv, Israel



**Year Founded**  
2019



**Employees (Listed On LinkedIn)**  
26



**Company Website**  
[storydoc.com](https://storydoc.com)



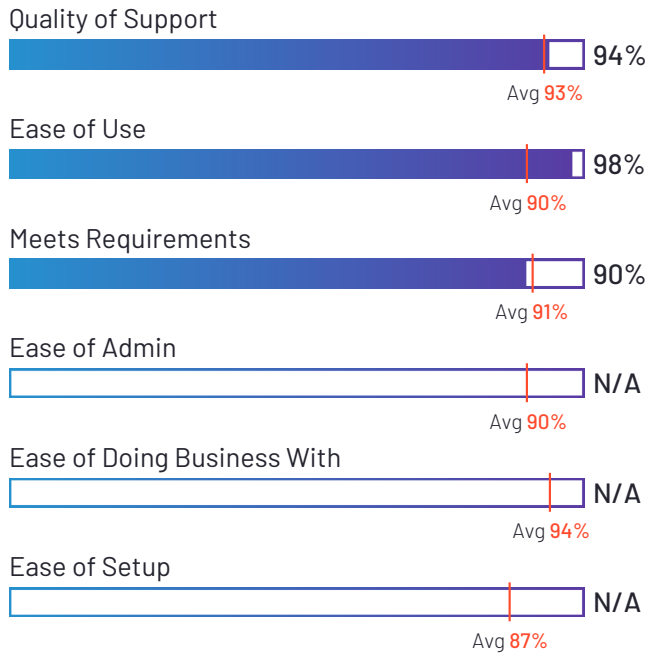
Quotient

## Quotient

4.7 ★★★★★ (21)

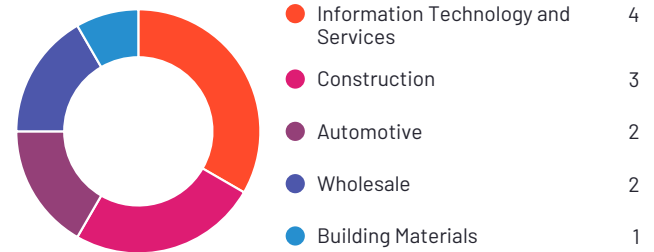
Quotient has been named a Niche product based on having a relatively low Satisfaction score and low Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. 95% of users rated it 4 or 5 stars, 91% of users believe it is headed in the right direction, and users said they would be likely to recommend Quotient at a rate of 93%.

## Satisfaction Ratings

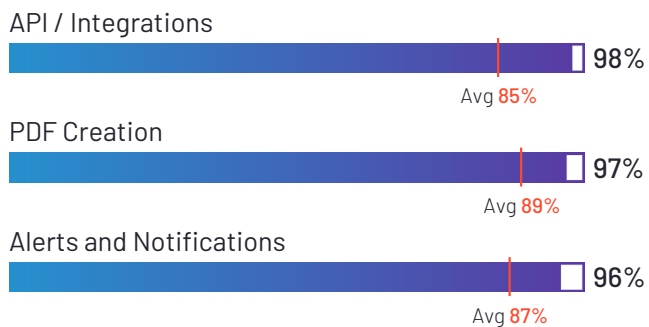


\*N/A is displayed when fewer than five responses were received for the question.

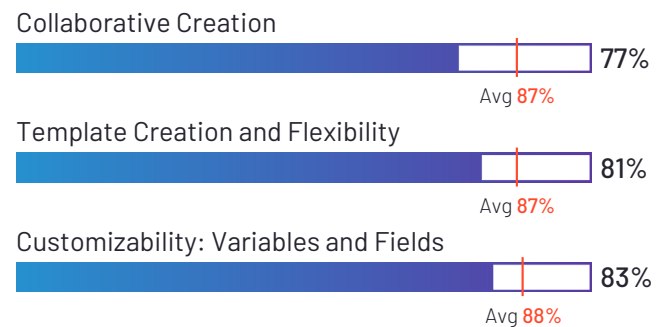
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



Ownership  
Quotient



HQ Location  
Columbia, MD



Year Founded  
2011



Employees (Listed  
On LinkedIn)  
2



Company Website  
[quotientapp.com](https://quotientapp.com)

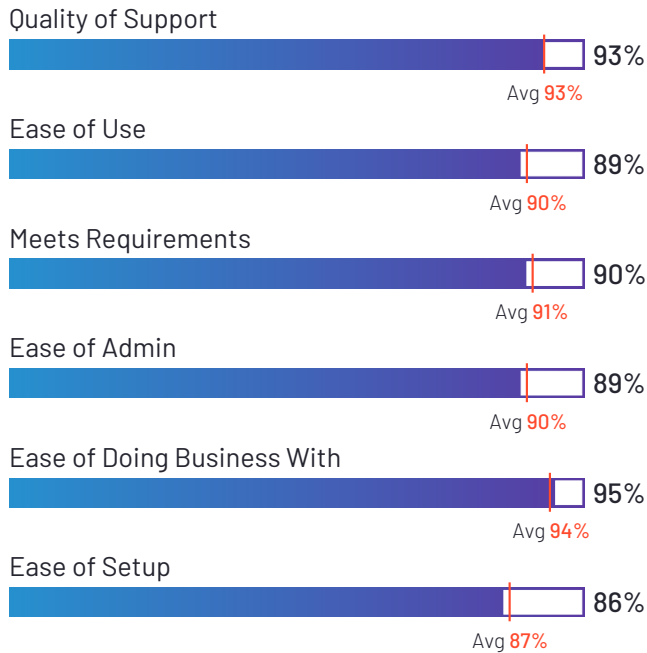


# ClientPoint

4.5 ★★★★★ (198)

ClientPoint has been named a Niche product based on having a relatively low Satisfaction score and low Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. 95% of users rated it 4 or 5 stars, 94% of users believe it is headed in the right direction, and users said they would be likely to recommend ClientPoint at a rate of 89%. ClientPoint is also in the Digital Sales Room, Document Generation, Sales Enablement, and Enterprise Content Management (ECM) categories.

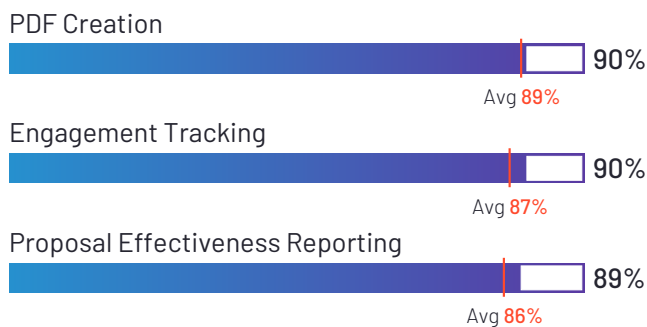
## Satisfaction Ratings



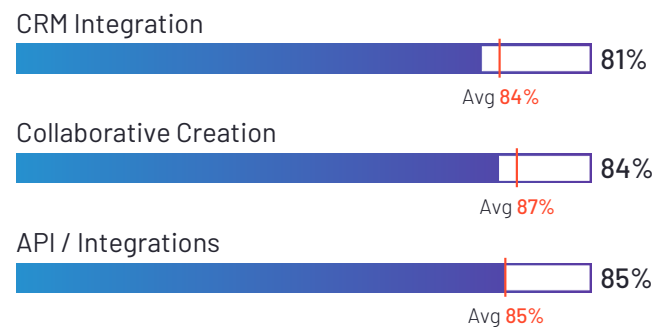
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
ClientPoint



**HQ Location**  
Carlsbad, CA



**Year Founded**  
2009



**Employees (Listed On LinkedIn)**  
30



**Company Website**  
[clientpoint.net](https://clientpoint.net)

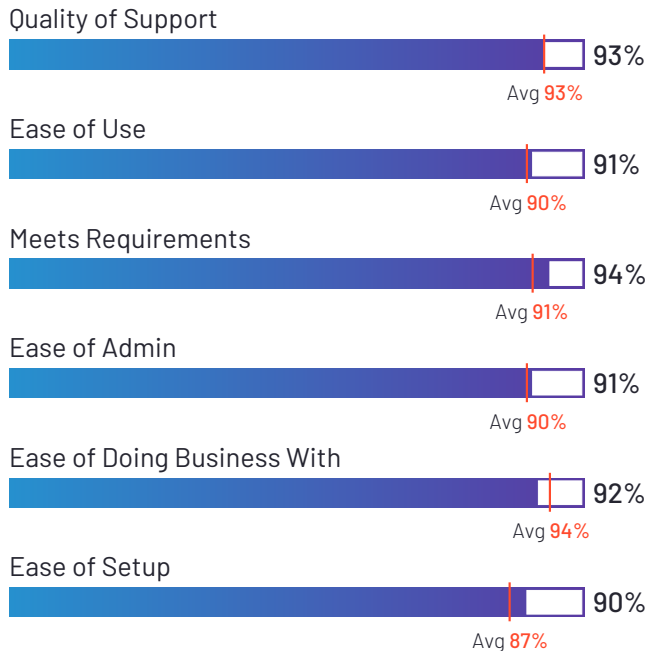


# Zomentum e-Sign and Payment

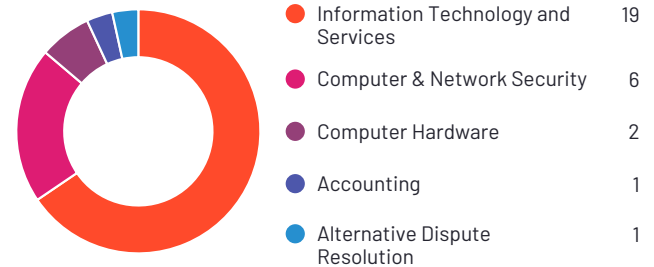
4.6 ★★★★★ (30)

Zomentum e-Sign and Payment has been named a Niche product based on having a relatively low Satisfaction score and low Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. 100% of users rated it 4 or 5 stars, 100% of users believe it is headed in the right direction, and users said they would be likely to recommend Zomentum e-Sign and Payment at a rate of 92%. Zomentum e-Sign and Payment is also in the Customer Revenue Optimization, E-Signature, CPQ, and Contract Management categories.

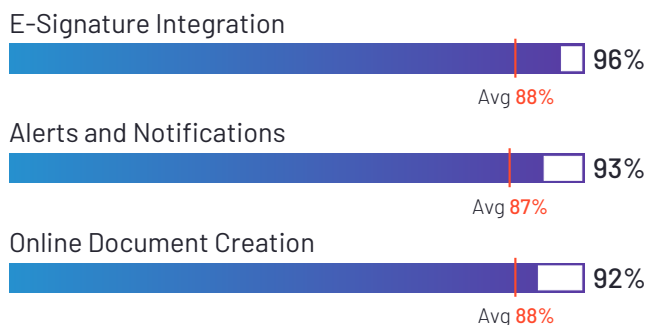
## Satisfaction Ratings



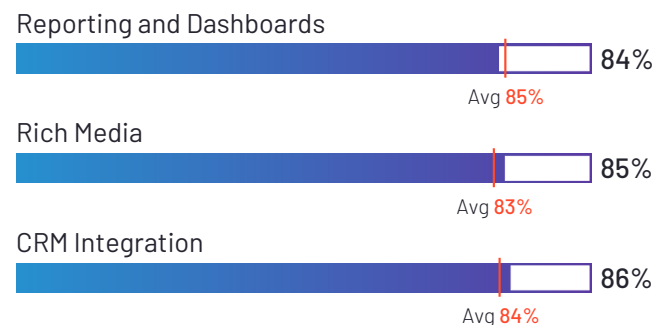
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
Zomentum



**HQ Location**  
San Francisco, CA



**Year Founded**  
2018



**Employees (Listed On LinkedIn)**  
70



**Company Website**  
[zomentum.com](https://zomentum.com)

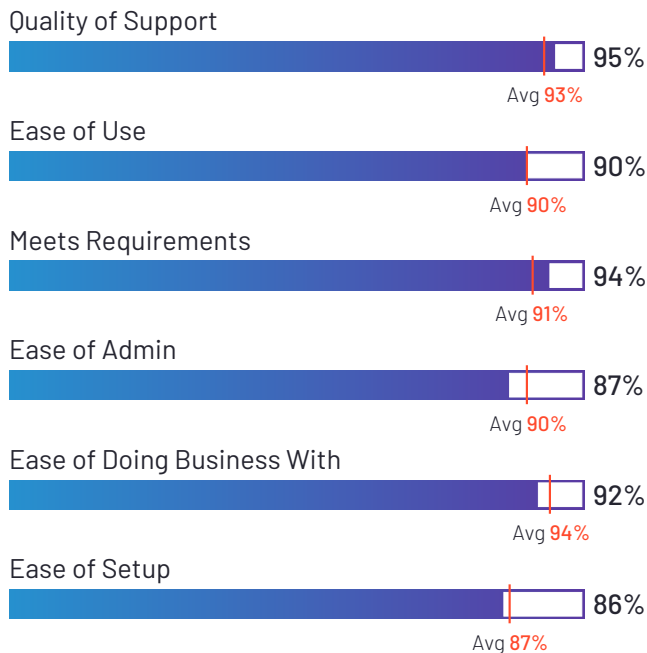
XaitPorter®

## XaitPorter

4.6 ★★★★★ (51)

XaitPorter has been named a Niche product based on having a relatively low Satisfaction score and low Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. 100% of users rated it 4 or 5 stars, 97% of users believe it is headed in the right direction, and users said they would be likely to recommend XaitPorter at a rate of 92%. XaitPorter is also in the Document Generation, Document Creation, Salesforce AppExchange Apps, and RFP categories.

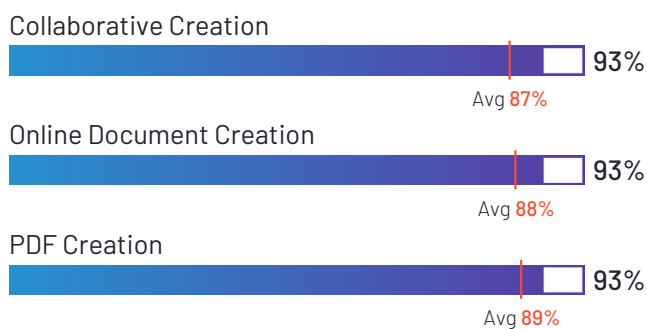
## Satisfaction Ratings



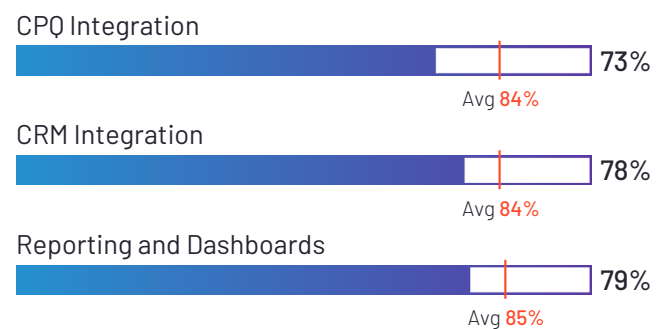
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
Xait



**HQ Location**  
Sandnes, Norway



**Year Founded**  
2000



**Employees (Listed On LinkedIn)**  
89



**Company Website**  
[www.xait.com](http://www.xait.com)

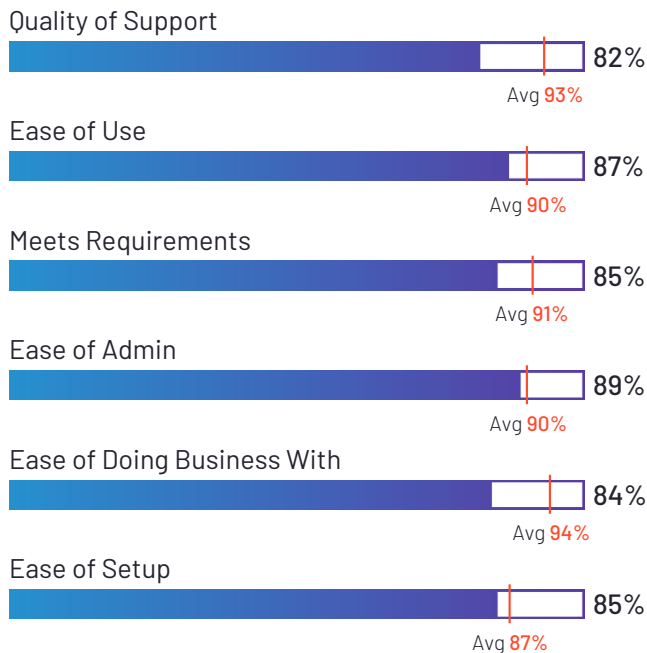


## Ideagen Huddle

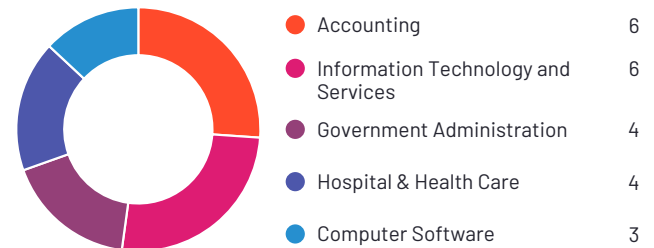
4.2 ★★★★★ (132)

Ideagen Huddle has been named a Niche product based on having a relatively low Satisfaction score and low Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. 83% of users rated it 4 or 5 stars, 69% of users believe it is headed in the right direction, and users said they would be likely to recommend Ideagen Huddle at a rate of 81%. Ideagen Huddle is also in the Cloud Content Collaboration and Client Portal categories.

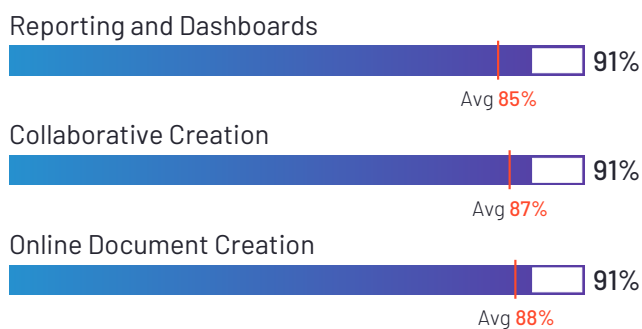
### Satisfaction Ratings



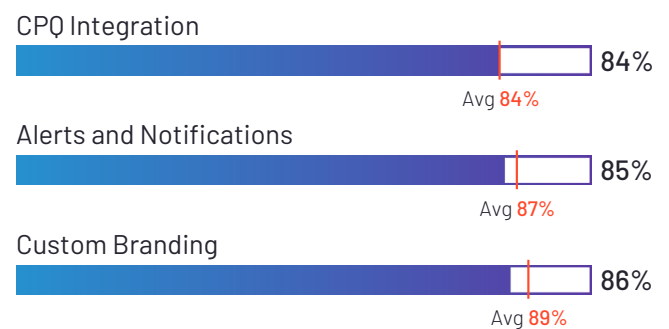
### Top Industries Represented



### Highest-Rated Features



### Lowest-Rated Features



**Ownership**  
Ideagen



**HQ Location**  
Ruddington,  
Nottingham



**Year Founded**  
2000



**Employees (Listed  
On LinkedIn)**  
1,193



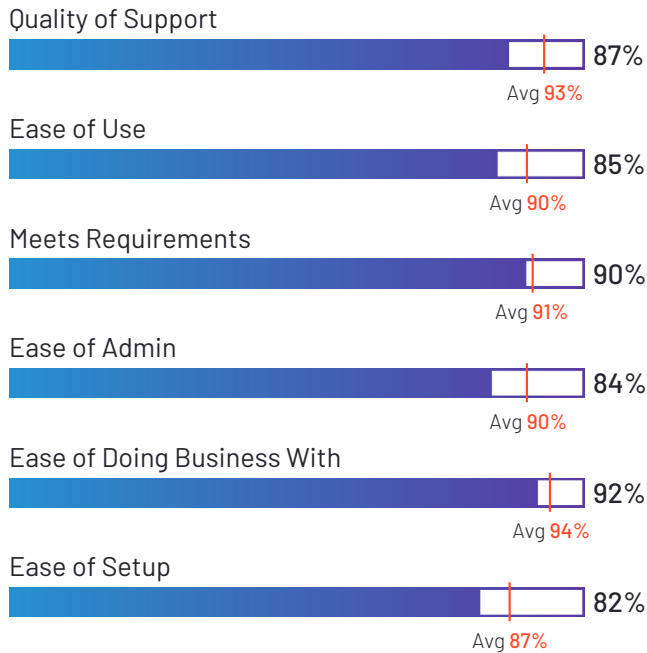
**Company Website**  
[ideagen.com](https://ideagen.com)

**QuoteWerks**

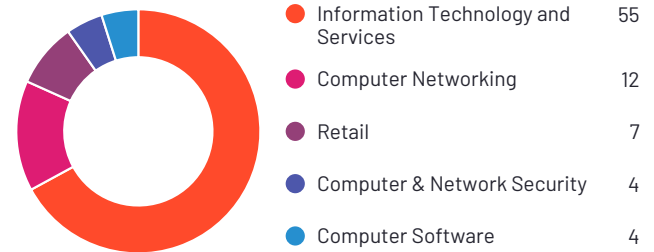
4.3 ★★★★★ (182)

QuoteWerks has been named a Niche product based on having a relatively low Satisfaction score and low Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. 92% of users rated it 4 or 5 stars, 85% of users believe it is headed in the right direction, and users said they would be likely to recommend QuoteWerks at a rate of 88%. QuoteWerks is also in the CPQ and Quote-to-Cash categories.

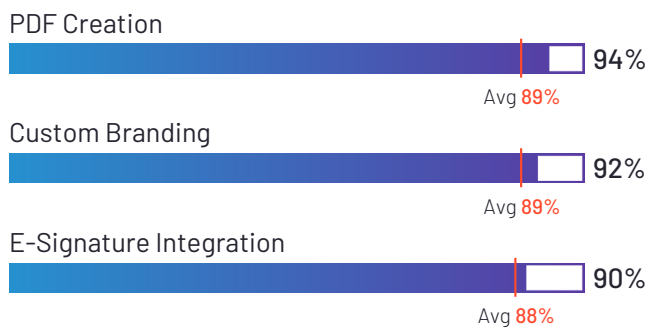
## Satisfaction Ratings



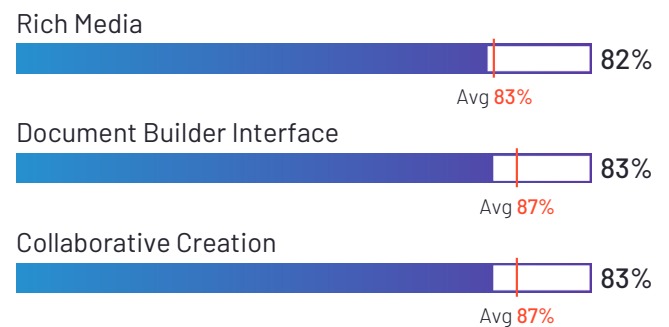
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
Aspire Technologies



**HQ Location**  
Orlando, FL



**Year Founded**  
1993



**Employees (Listed On LinkedIn)**  
48



**Company Website**  
[quotewerks.com](https://quotewerks.com)

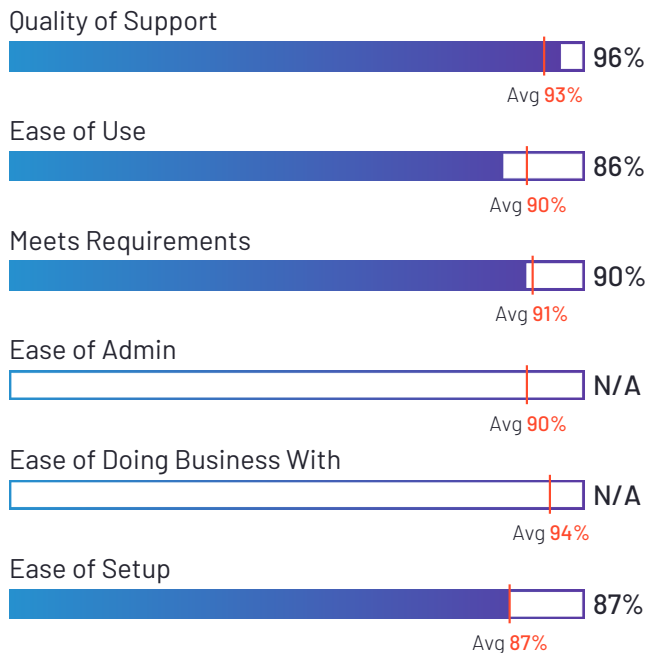


# Revolear

4.6 ★★★★★ (11)

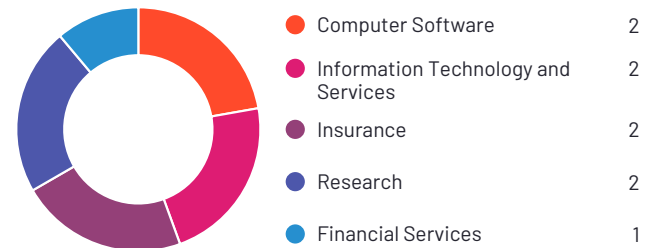
Revolear has been named a Niche product based on having a relatively low Satisfaction score and low Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. 100% of users rated it 4 or 5 stars, 100% of users believe it is headed in the right direction, and users said they would be likely to recommend Revolear at a rate of 94%. Revolear is also in the Digital Sales Room, AI Sales Assistant, Contract Management, and CPQ categories.

## Satisfaction Ratings

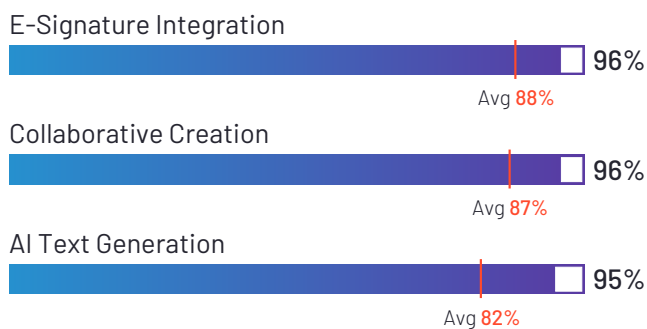


\*N/A is displayed when fewer than five responses were received for the question.

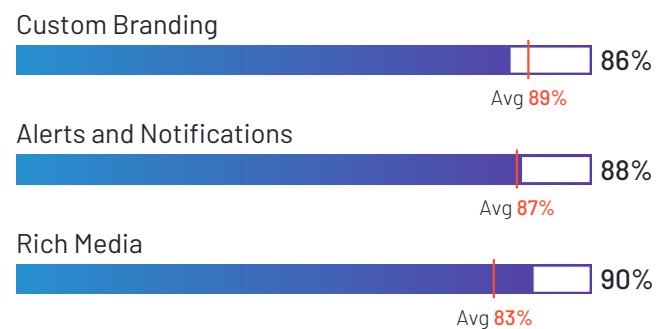
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
Revolear



**HQ Location**  
San Francisco,  
California, United  
States



**Year Founded**  
2022



**Employees (Listed  
On LinkedIn)**  
9



**Company Website**  
[revolear.com](https://revolear.com)

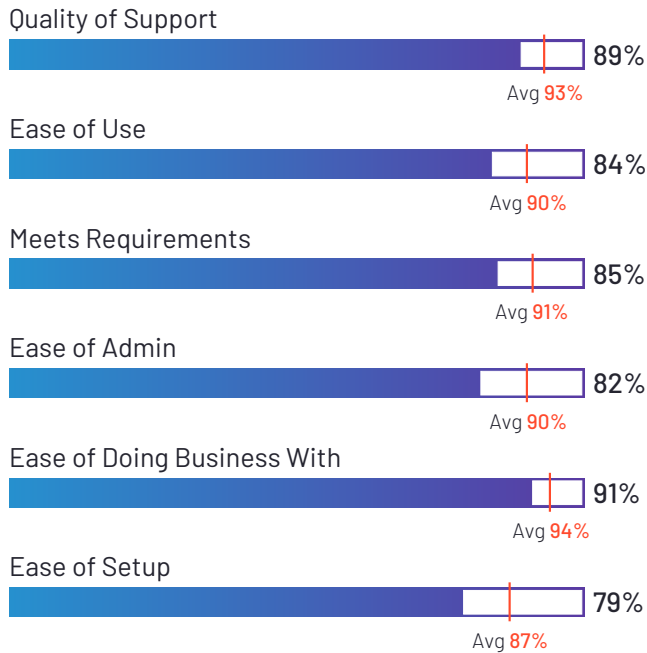


# RocketDocs

4.2 ★★★★★☆ (101)

RocketDocs has been named a Niche product based on having a relatively low Satisfaction score and low Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. 94% of users rated it 4 or 5 stars, 89% of users believe it is headed in the right direction, and users said they would be likely to recommend RocketDocs at a rate of 85%. RocketDocs is also in the RFP, Document Generation, and Salesforce AppExchange Apps categories.

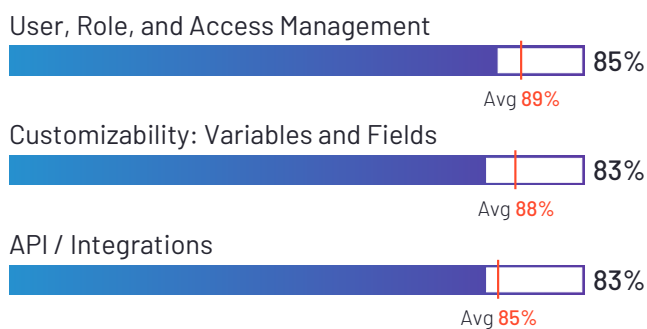
## Satisfaction Ratings



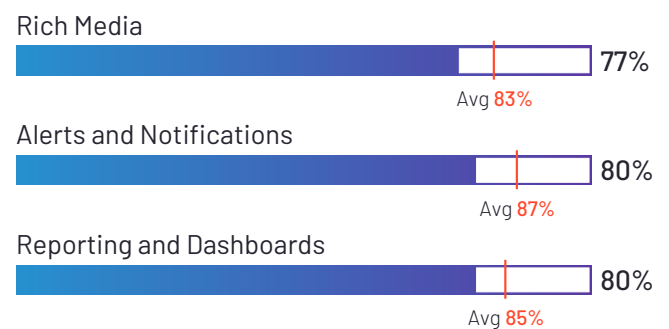
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
RocketDocs



**HQ Location**  
Dallas, TX



**Year Founded**  
1994



**Employees (Listed On LinkedIn)**  
26



**Company Website**  
[rocketdocs.com](https://rocketdocs.com)

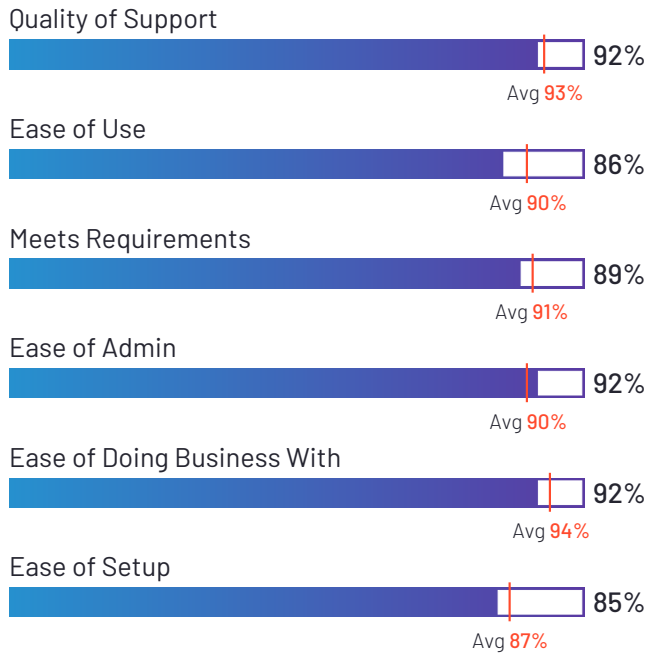


## Better Proposals

4.3 ★★★★★ (48)

Better Proposals has been named a Niche product based on having a relatively low Satisfaction score and low Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. 85% of users rated it 4 or 5 stars, 89% of users believe it is headed in the right direction, and users said they would be likely to recommend Better Proposals at a rate of 86%.

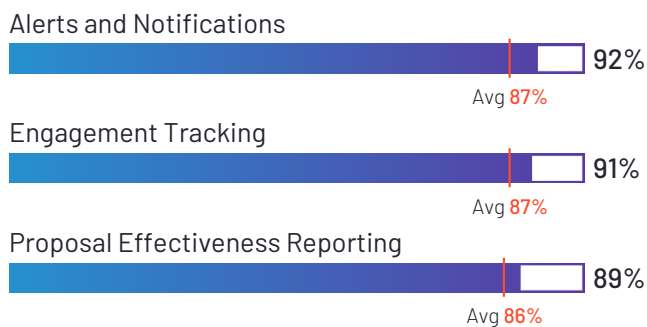
### Satisfaction Ratings



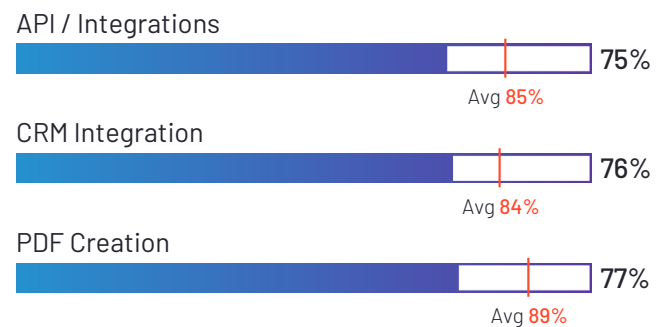
### Top Industries Represented



### Highest-Rated Features



### Lowest-Rated Features



**Ownership**  
Better Proposals



**HQ Location**  
Brighton, United Kingdom



**Year Founded**  
2009



**Employees (Listed On LinkedIn)**  
8



**Company Website**  
[betterproposals.io](https://betterproposals.io)

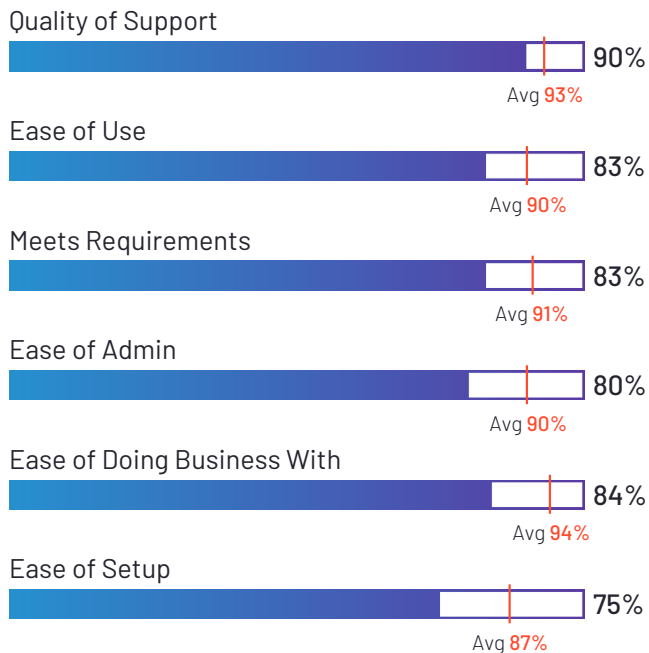


## Pricefx

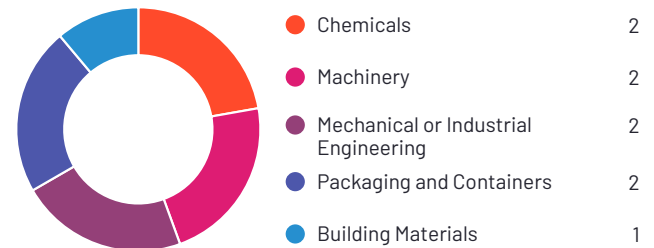
4.4 ★★★★★ (107)

Pricefx has been named a Niche product based on having a relatively low Satisfaction score and low Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. 100% of users rated it 4 or 5 stars, 100% of users believe it is headed in the right direction, and users said they would be likely to recommend Pricefx at a rate of 86%. Pricefx is also in the Quote-to-Cash, Pricing, CPQ, and Rebate Management categories.

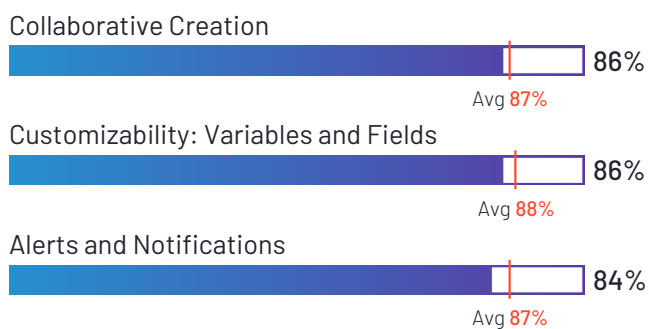
### Satisfaction Ratings



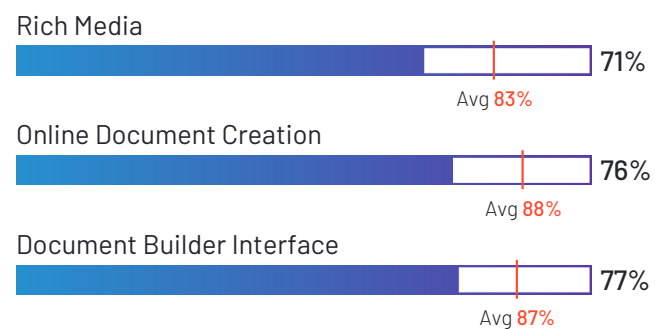
### Top Industries Represented



### Highest-Rated Features



### Lowest-Rated Features



**Ownership**  
Pricefx



**HQ Location**  
Prague, Czech Republic



**Year Founded**  
2011



**Employees (Listed On LinkedIn)**  
424



**Company Website**  
[pricefx.com](https://pricefx.com)

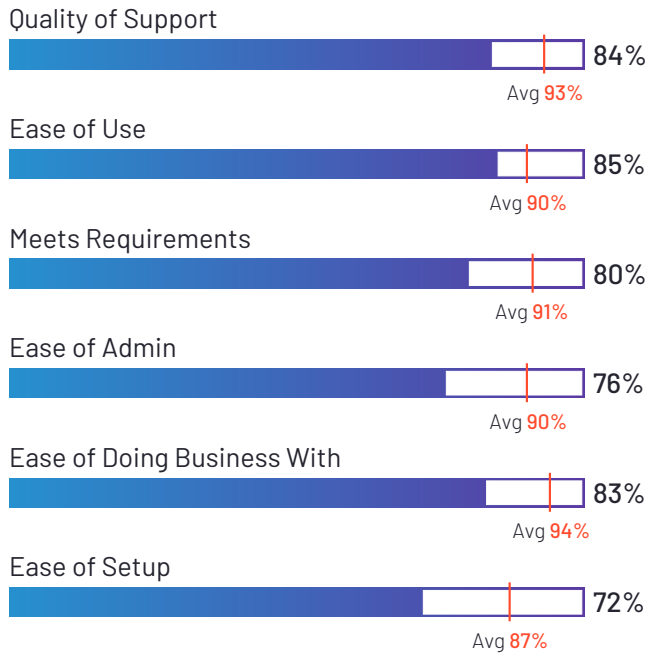


## Tacton CPQ

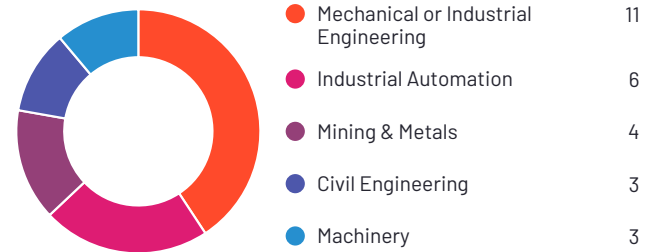
4.3 ★★★★★ (54)

Tacton CPQ has been named a Niche product based on having a relatively low Satisfaction score and low Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. 90% of users rated it 4 or 5 stars, 86% of users believe it is headed in the right direction, and users said they would be likely to recommend Tacton CPQ at a rate of 86%. Tacton CPQ is also in the CPQ category.

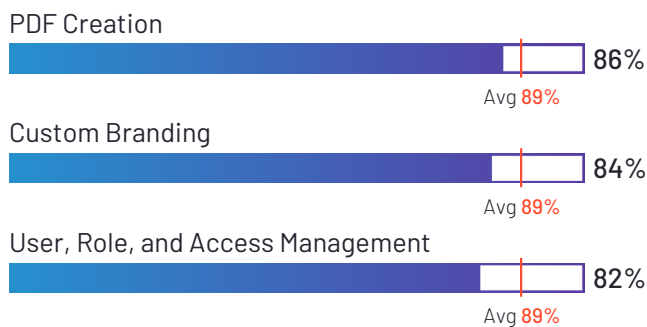
### Satisfaction Ratings



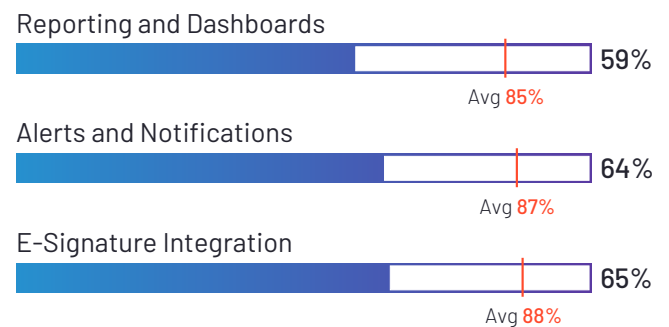
### Top Industries Represented



### Highest-Rated Features



### Lowest-Rated Features



**Ownership**  
Tacton



**HQ Location**  
Stockholm, Sweden



**Year Founded**  
1998



**Employees (Listed On LinkedIn)**  
222



**Company Website**  
[www.tacton.com](http://www.tacton.com)

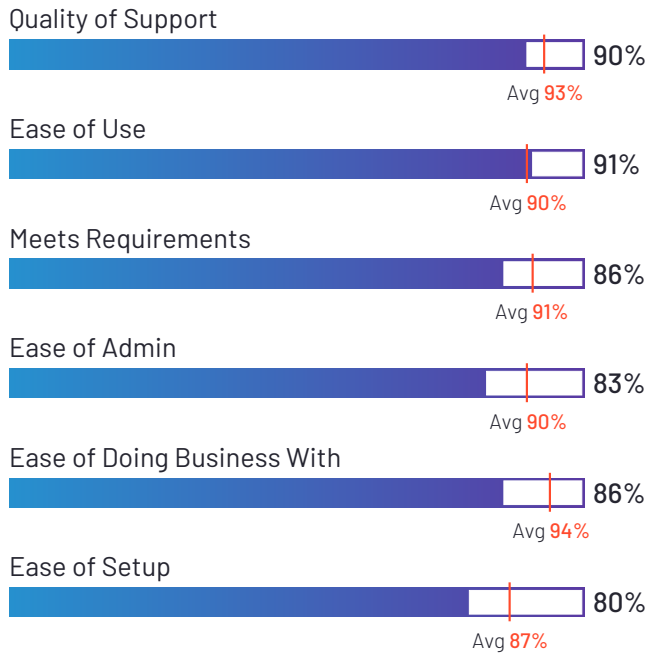


## SmartDocs

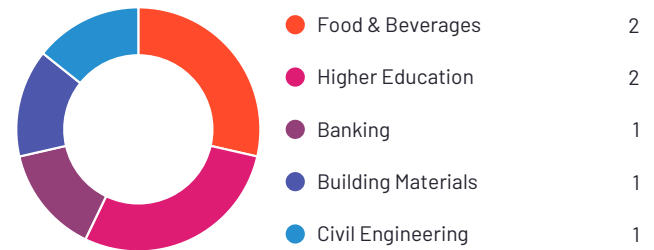
4.5 ★★★★★ (15)

SmartDocs has been named a Niche product based on having a relatively low Satisfaction score and low Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. 93% of users rated it 4 or 5 stars, 100% of users believe it is headed in the right direction, and users said they would be likely to recommend SmartDocs at a rate of 91%.

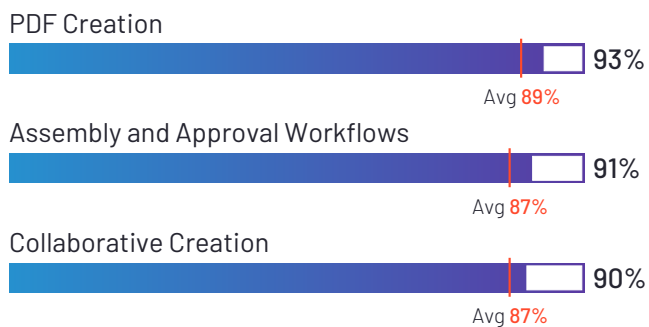
### Satisfaction Ratings



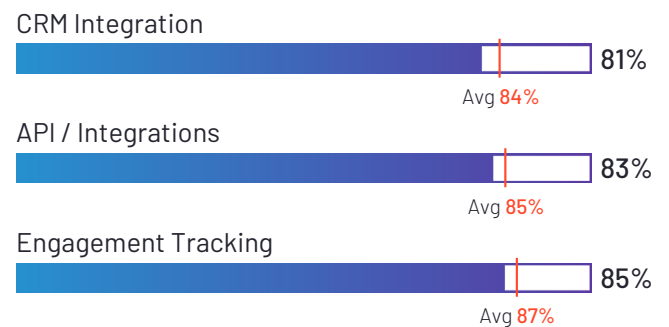
### Top Industries Represented



### Highest-Rated Features



### Lowest-Rated Features



**Ownership**  
ThirtySix Software



**HQ Location**  
Rochester, NY



**Year Founded**  
2009



**Employees (Listed On LinkedIn)**  
4



**Company Website**  
[36software.com](https://36software.com)

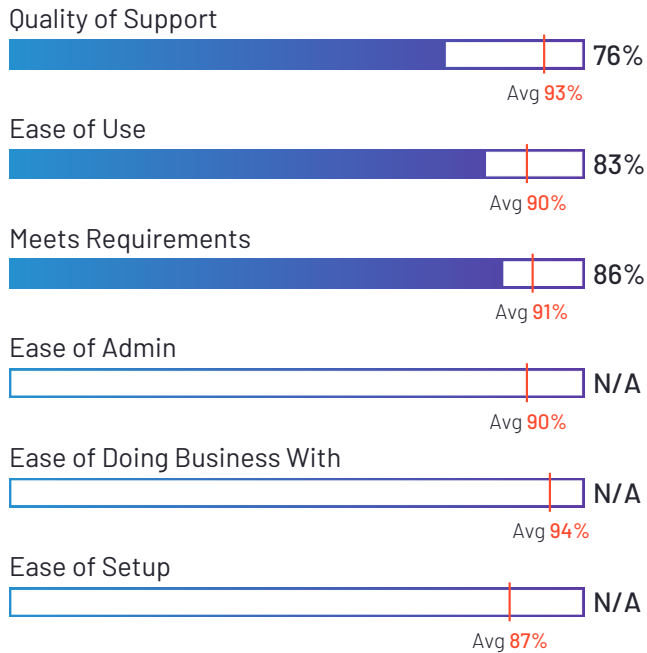


## Bidsketch

3.6 ★★★★★ (11)

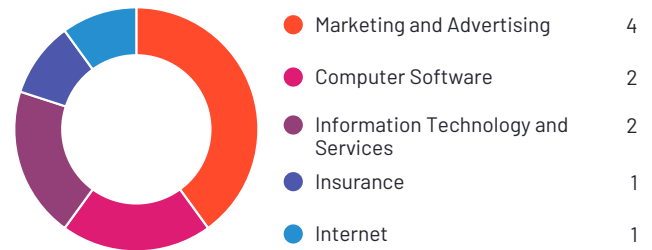
Bidsketch has been named a Niche product based on having a relatively low Satisfaction score and low Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. 73% of users rated it 4 or 5 stars, 64% of users believe it is headed in the right direction, and users said they would be likely to recommend Bidsketch at a rate of 73%.

### Satisfaction Ratings

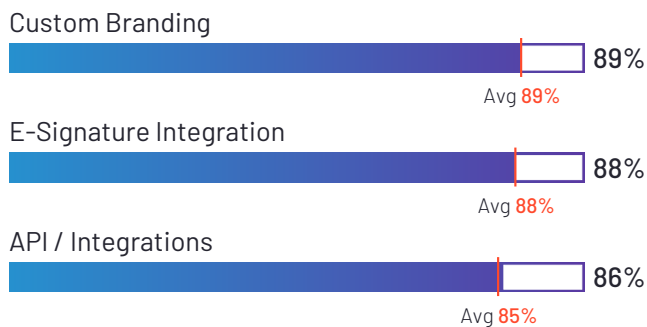


\*N/A is displayed when fewer than five responses were received for the question.

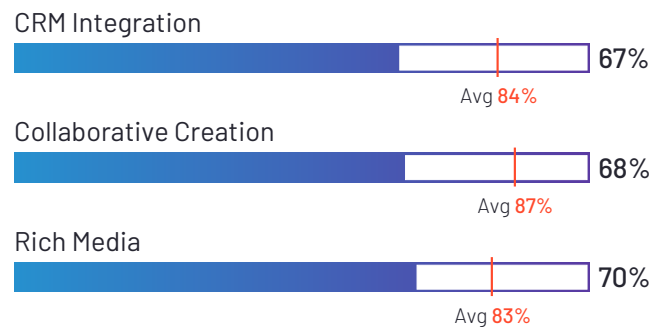
### Top Industries Represented



### Highest-Rated Features



### Lowest-Rated Features



**Ownership**  
SignWell



**HQ Location**  
Spokane, WA



**Year Founded**  
2010



**Employees (Listed On LinkedIn)**  
3



**Company Website**  
[signwell.com](https://signwell.com)

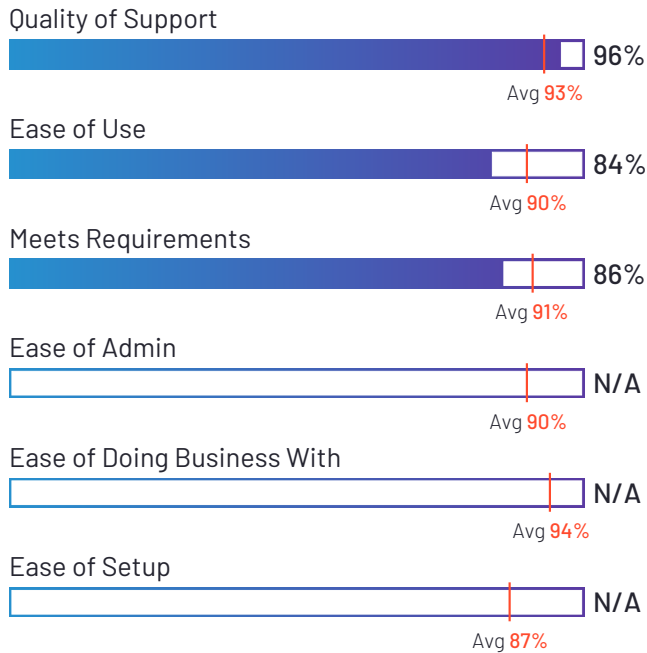


# Revv

4.6 ★★★★★ (45)

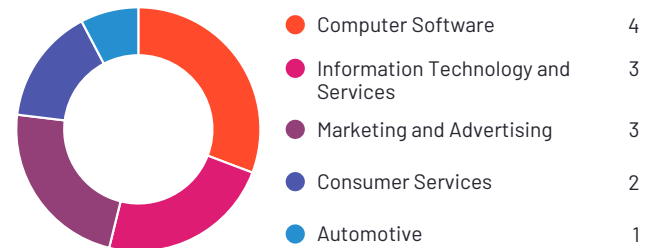
Revv has been named a Niche product based on having a relatively low Satisfaction score and low Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. 95% of users rated it 4 or 5 stars, 86% of users believe it is headed in the right direction, and users said they would be likely to recommend Revv at a rate of 91%. Revv is also in the Document Generation, E-Signature, CPQ, and Contract Management categories.

## Satisfaction Ratings

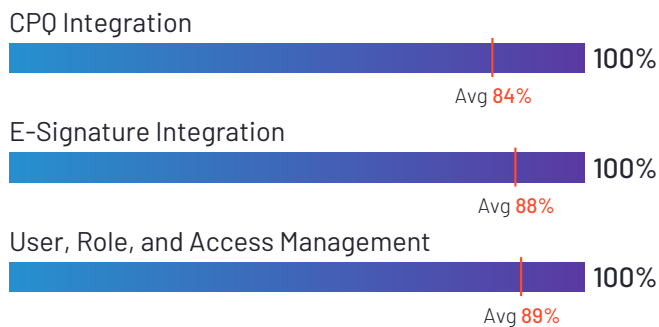


\*N/A is displayed when fewer than five responses were received for the question.

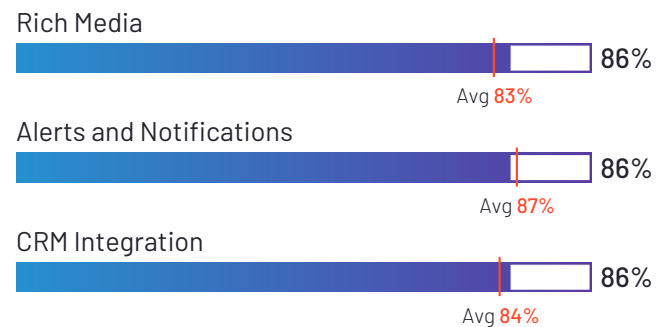
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
Revv



**HQ Location**  
Walnut, California



**Year Founded**  
2018



**Employees (Listed On LinkedIn)**  
17



**Company Website**  
[revv.so](https://revv.so)

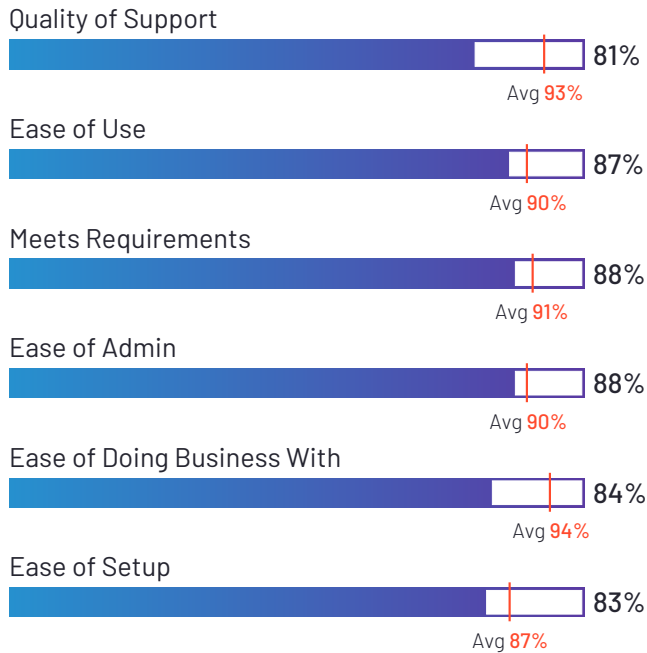


# Proposable

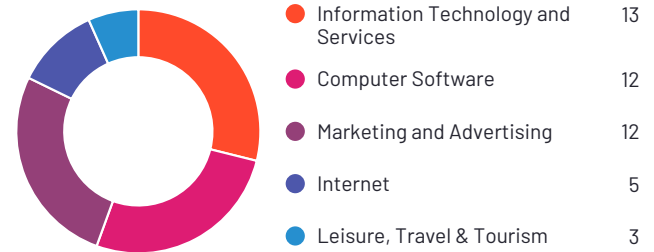
4.2 ★★★★★ (74)

Proposable has been named a Niche product based on having a relatively low Satisfaction score and low Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. 91% of users rated it 4 or 5 stars, 81% of users believe it is headed in the right direction, and users said they would be likely to recommend Proposable at a rate of 84%.

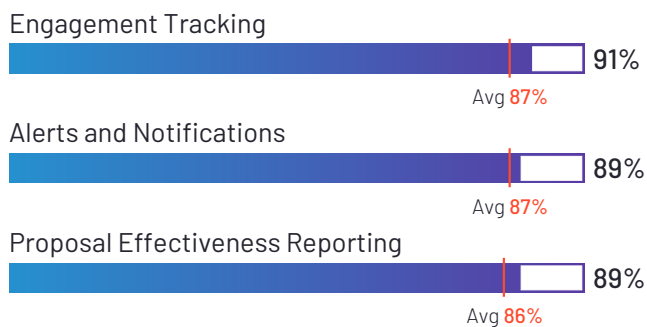
## Satisfaction Ratings



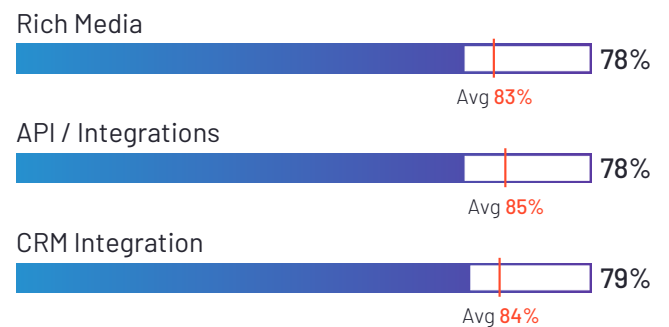
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
Proposable



**HQ Location**  
Bloomington, IN



**Year Founded**  
2009



**Employees (Listed On LinkedIn)**  
2



**Company Website**  
[proposable.com](https://proposable.com)

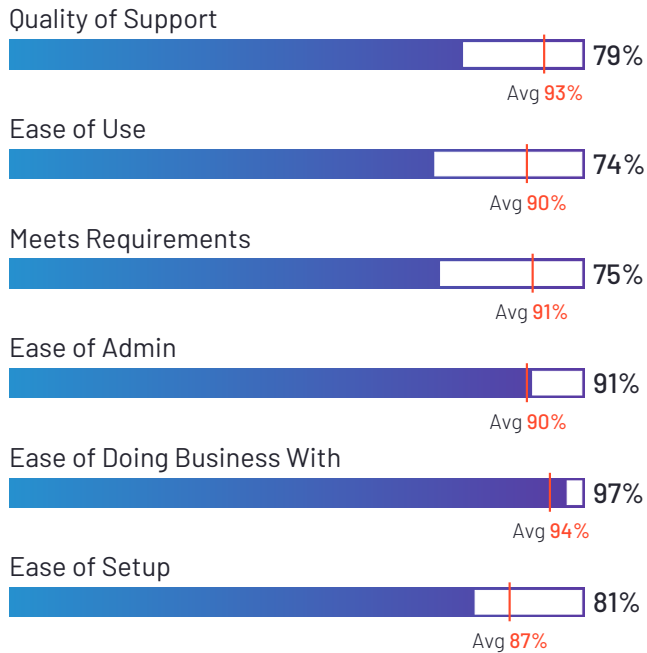


# Privia

3.6 ★★★★★ (20)

Privia has been named a Niche product based on having a relatively low Satisfaction score and low Market Presence compared to the rest of the category. While they may have positive reviews, they do not have enough reviews to validate those ratings. 71% of users rated it 4 or 5 stars, 47% of users believe it is headed in the right direction, and users said they would be likely to recommend Privia at a rate of 71%.

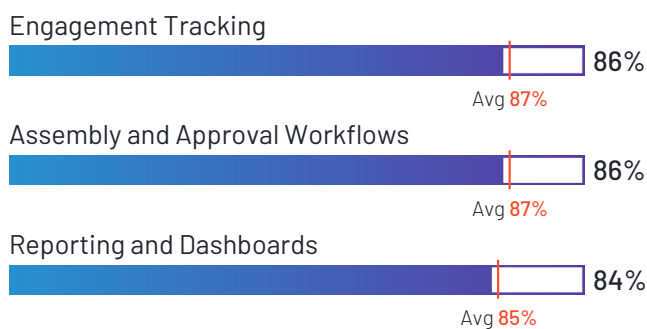
## Satisfaction Ratings



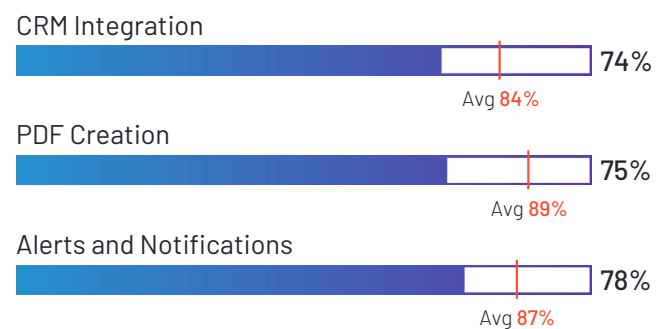
## Top Industries Represented



## Highest-Rated Features



## Lowest-Rated Features



**Ownership**  
Privia



**HQ Location**  
Herndon, VA



**Employees (Listed On LinkedIn)**  
2



**Company Website**  
[www.privia.com](http://www.privia.com)



# Satisfaction Ratings for Proposal

G2 reviewers rated software sellers ability to satisfy their needs as shown in the table below.

|                               | Satisfaction            |                                   | Satisfaction by Category |               |                             |                    |               |             | Net Promoter Score (NPS) |
|-------------------------------|-------------------------|-----------------------------------|--------------------------|---------------|-----------------------------|--------------------|---------------|-------------|--------------------------|
|                               | Likelihood to Recommend | Product Going in Right Direction? | Meets Requirements       | Ease of Admin | Ease of Doing Business With | Quality of Support | Ease of Setup | Ease of Use |                          |
| PandaDoc                      | 93%                     | 92%                               | 92%                      | 91%           | 93%                         | 91%                | 90%           | 91%         | 81                       |
| Responsive, formerly RFPIO    | 92%                     | 92%                               | 91%                      | 91%           | 95%                         | 94%                | 89%           | 90%         | 72                       |
| Proposify                     | 93%                     | 93%                               | 92%                      | 92%           | 95%                         | 94%                | 88%           | 87%         | 77                       |
| DealHub.io                    | 95%                     | 95%                               | 93%                      | 89%           | 97%                         | 97%                | 87%           | 93%         | 87                       |
| GetAccept                     | 93%                     | 93%                               | 91%                      | 89%           | 95%                         | 94%                | 90%           | 91%         | 77                       |
| Qwilr                         | 91%                     | 93%                               | 88%                      | 90%           | 94%                         | 92%                | 91%           | 90%         | 72                       |
| Loopio                        | 95%                     | 97%                               | 92%                      | 94%           | 97%                         | 97%                | 91%           | 94%         | 86                       |
| Ignition                      | 95%                     | 100%                              | 92%                      | 93%           | 96%                         | 96%                | 89%           | 93%         | 84                       |
| RELAYTO                       | 97%                     | 98%                               | 96%                      | 95%           | 97%                         | 98%                | 94%           | 97%         | 90                       |
| Oneflow                       | 89%                     | 87%                               | 89%                      | 87%           | 90%                         | 88%                | 86%           | 90%         | 65                       |
| AutogenAI                     | 90%                     | 100%                              | 87%                      | 92%           | 98%                         | 97%                | 89%           | 84%         | 60                       |
| FastSpring Interactive Quotes | 94%                     | 91%                               | 95%                      | 94%           | 98%                         | 96%                | 88%           | 100%        | 84                       |
| TaxDome                       | 94%                     | 97%                               | 89%                      | 86%           | 97%                         | 95%                | 74%           | 84%         | 86                       |
| fynk                          | 99%                     | 100%                              | 100%                     | 100%          | 100%                        | 100%               | 99%           | 100%        | 100                      |
| Anchor                        | 97%                     | 100%                              | 94%                      | 91%           | 97%                         | 94%                | 88%           | 91%         | 93                       |
| OnePageCRM                    | 97%                     | 100%                              | 93%                      | 95%           | 98%                         | 97%                | 92%           | 95%         | 96                       |
| Smart Pricing Table           | 100%                    | 100%                              | 97%                      | 99%           | 100%                        | 100%               | 95%           | 97%         | 100                      |
| Minoa                         | 100%                    | 100%                              | 98%                      | 94%           | 100%                        | 99%                | 100%          | 100%        | 100                      |
| Cacheflow                     | 93%                     | 92%                               | 89%                      | 95%           | 98%                         | 94%                | 91%           | 91%         | 80                       |

(Satisfaction Ratings for Proposal continues on next page)

\*N/A is displayed when fewer than five responses were received for the question.

\*\*Net Promoter Score ranges from -100 to +100



# Satisfaction Ratings for Proposal (continued)

G2 reviewers rated software sellers ability to satisfy their needs as shown in the table below.

|                  | Satisfaction            |                                   | Satisfaction by Category |               |                             |                    |               |             | Net Promoter Score (NPS) |
|------------------|-------------------------|-----------------------------------|--------------------------|---------------|-----------------------------|--------------------|---------------|-------------|--------------------------|
|                  | Likelihood to Recommend | Product Going in Right Direction? | Meets Requirements       | Ease of Admin | Ease of Doing Business With | Quality of Support | Ease of Setup | Ease of Use |                          |
| AutoRFP.ai       | 98%                     | 100%                              | 96%                      | 94%           | 99%                         | 99%                | 93%           | 93%         | 90                       |
| Bonsai           | 89%                     | 94%                               | 87%                      | 89%           | 86%                         | 87%                | 90%           | 89%         | 64                       |
| Cone Propose     | 97%                     | 100%                              | 97%                      | N/A           | N/A                         | 98%                | 95%           | 92%         | 93                       |
| Ombud            | 95%                     | 89%                               | 90%                      | 95%           | 100%                        | 99%                | 98%           | 94%         | 90                       |
| Zilliant CPQ     | 96%                     | 64%                               | 97%                      | 94%           | 96%                         | 98%                | 93%           | 95%         | 93                       |
| Nusii            | 90%                     | 89%                               | 99%                      | 99%           | 100%                        | 97%                | 96%           | 94%         | 79                       |
| Tango Agreements | 99%                     | 100%                              | 95%                      | 100%          | 100%                        | 100%               | 98%           | 97%         | 100                      |
| Clientary        | 94%                     | 100%                              | 95%                      | 98%           | 100%                        | 96%                | 95%           | 98%         | 84                       |
| Flowcase         | 92%                     | 82%                               | 90%                      | 93%           | 94%                         | 95%                | 85%           | 92%         | 73                       |
| Proposal Kit     | 93%                     | 89%                               | 94%                      | 90%           | 97%                         | 98%                | 90%           | 90%         | 83                       |
| ScalePad Quoter  | 94%                     | 100%                              | 92%                      | 97%           | 98%                         | 96%                | 89%           | 92%         | 85                       |
| Fresh Proposals  | 95%                     | 100%                              | 95%                      | 95%           | 98%                         | 100%               | 96%           | 91%         | 86                       |
| RevOps           | 94%                     | 100%                              | 92%                      | 96%           | 98%                         | 95%                | 94%           | 92%         | 86                       |
| Tilkee           | 92%                     | 91%                               | 96%                      | 95%           | 98%                         | 100%               | 98%           | 95%         | 72                       |
| Oracle CPQ       | 80%                     | 77%                               | 86%                      | 83%           | 83%                         | 79%                | 81%           | 80%         | 25                       |
| DocSend          | 94%                     | 91%                               | 92%                      | 90%           | 91%                         | 92%                | 91%           | 93%         | 82                       |
| Upland Qvidian   | 86%                     | 89%                               | 86%                      | 81%           | 92%                         | 89%                | 81%           | 83%         | 51                       |
| Conga Composer   | 88%                     | 86%                               | 91%                      | 86%           | 91%                         | 91%                | 83%           | 86%         | 59                       |
| ConnectWise CPQ  | 81%                     | 78%                               | 85%                      | 79%           | 86%                         | 80%                | 74%           | 81%         | 35                       |

(Satisfaction Ratings for Proposal continues on next page)

\*N/A is displayed when fewer than five responses were received for the question.

\*\*Net Promoter Score ranges from -100 to +100



# Satisfaction Ratings for Proposal (continued)

G2 reviewers rated software sellers ability to satisfy their needs as shown in the table below.

|                             | Satisfaction            |                                   | Satisfaction by Category |               |                             |                    |               |             | Net Promoter Score (NPS) |
|-----------------------------|-------------------------|-----------------------------------|--------------------------|---------------|-----------------------------|--------------------|---------------|-------------|--------------------------|
|                             | Likelihood to Recommend | Product Going in Right Direction? | Meets Requirements       | Ease of Admin | Ease of Doing Business With | Quality of Support | Ease of Setup | Ease of Use |                          |
| Odoo Sales                  | 92%                     | 100%                              | 89%                      | 83%           | 91%                         | 86%                | 80%           | 87%         | 69                       |
| Fiverr Workspace            | 90%                     | 87%                               | 91%                      | N/A           | N/A                         | 97%                | N/A           | 96%         | 64                       |
| Conga CLM                   | 84%                     | 88%                               | 85%                      | 83%           | 91%                         | 88%                | 77%           | 82%         | 42                       |
| Epicor CPQ                  | 93%                     | 97%                               | 91%                      | 80%           | 92%                         | 94%                | 74%           | 91%         | 77                       |
| QorusDocs                   | 88%                     | 89%                               | 87%                      | 85%           | 93%                         | 94%                | 78%           | 86%         | 56                       |
| Nintex                      | 83%                     | 79%                               | 87%                      | 80%           | 87%                         | 85%                | 78%           | 83%         | 36                       |
| Vendavo                     | 88%                     | 91%                               | 91%                      | 77%           | 95%                         | 91%                | 79%           | 81%         | 60                       |
| Ideagen PleaseReview        | 89%                     | 82%                               | 88%                      | 86%           | 83%                         | 87%                | 87%           | 84%         | 60                       |
| Storydoc                    | 92%                     | 94%                               | 92%                      | 90%           | 94%                         | 91%                | 95%           | 89%         | 66                       |
| Quotient                    | 93%                     | 91%                               | 90%                      | N/A           | N/A                         | 94%                | N/A           | 98%         | 76                       |
| ClientPoint                 | 89%                     | 94%                               | 90%                      | 89%           | 95%                         | 93%                | 86%           | 89%         | 64                       |
| Zomentum e-Sign and Payment | 92%                     | 100%                              | 94%                      | 91%           | 92%                         | 93%                | 90%           | 91%         | 70                       |
| XaitPorter                  | 92%                     | 97%                               | 94%                      | 87%           | 92%                         | 95%                | 86%           | 90%         | 78                       |
| Ideagen Huddle              | 81%                     | 69%                               | 85%                      | 89%           | 84%                         | 82%                | 85%           | 87%         | 34                       |
| QuoteWerks                  | 88%                     | 85%                               | 90%                      | 84%           | 92%                         | 87%                | 82%           | 85%         | 58                       |
| Revolear                    | 94%                     | 100%                              | 90%                      | N/A           | N/A                         | 96%                | 87%           | 86%         | 90                       |
| RocketDocs                  | 85%                     | 89%                               | 85%                      | 82%           | 91%                         | 89%                | 79%           | 84%         | 46                       |
| Better Proposals            | 86%                     | 89%                               | 89%                      | 92%           | 92%                         | 92%                | 85%           | 86%         | 62                       |
| Pricefx                     | 86%                     | 100%                              | 83%                      | 80%           | 84%                         | 90%                | 75%           | 83%         | 44                       |

(Satisfaction Ratings for Proposal continues on next page)

\*N/A is displayed when fewer than five responses were received for the question.

\*\*Net Promoter Score ranges from -100 to +100



# Satisfaction Ratings for Proposal

## (continued)

G2 reviewers rated software sellers ability to satisfy their needs as shown in the table below.

|            | Satisfaction            |                                   | Satisfaction by Category |               |                             |                    |               |             | Net Promoter Score (NPS) |
|------------|-------------------------|-----------------------------------|--------------------------|---------------|-----------------------------|--------------------|---------------|-------------|--------------------------|
|            | Likelihood to Recommend | Product Going in Right Direction? | Meets Requirements       | Ease of Admin | Ease of Doing Business With | Quality of Support | Ease of Setup | Ease of Use |                          |
| Tacton CPQ | 86%                     | 86%                               | 80%                      | 76%           | 83%                         | 84%                | 72%           | 85%         | 53                       |
| SmartDocs  | 91%                     | 100%                              | 86%                      | 83%           | 86%                         | 90%                | 80%           | 91%         | 66                       |
| Bidsketch  | 73%                     | 64%                               | 86%                      | N/A           | N/A                         | 76%                | N/A           | 83%         | 27                       |
| Revv       | 91%                     | 86%                               | 86%                      | N/A           | N/A                         | 96%                | N/A           | 84%         | 76                       |
| Proposable | 84%                     | 81%                               | 88%                      | 88%           | 84%                         | 81%                | 83%           | 87%         | 47                       |
| Privia     | 71%                     | 47%                               | 75%                      | 91%           | 97%                         | 79%                | 81%           | 74%         | 5                        |
| Average    | 91%                     | 91%                               | 91%                      | 90%           | 94%                         | 93%                | 87%           | 90%         | 71                       |

\*N/A is displayed when fewer than five responses were received for the question.

\*\*Net Promoter Score ranges from -100 to +100



# Feature Comparison for Proposal

G2 users have evaluated the following products by feature. Feature ratings are representative of reviewers overall satisfaction with each feature and do not necessarily take into account the breadth of individual product features. The results are shown below.

## Document Creation

|                                  | Customizability:<br>Variables and<br>Fields | Template<br>Creation and<br>Flexibility | Rich Media | Online<br>Document<br>Creation | PDF Creation | Custom<br>Branding |
|----------------------------------|---------------------------------------------|-----------------------------------------|------------|--------------------------------|--------------|--------------------|
| PandaDoc                         | 89%                                         | 89%                                     | 86%        | 91%                            | 92%          | 90%                |
| Responsive, formerly RFPIO       | 86%                                         | 83%                                     | 82%        | 85%                            | 84%          | 85%                |
| Proposify                        | 87%                                         | 87%                                     | 87%        | 89%                            | 93%          | 93%                |
| DealHub.io                       | 95%                                         | 91%                                     | 90%        | 93%                            | 93%          | 94%                |
| GetAccept                        | 84%                                         | 85%                                     | 86%        | 87%                            | 88%          | 88%                |
| Qwilr                            | 82%                                         | 85%                                     | 86%        | 90%                            | 80%          | 86%                |
| Loopio                           | 85%                                         | 84%                                     | 79%        | 86%                            | 87%          | 88%                |
| Ignition                         | 92%                                         | 93%                                     | 87%        | 90%                            | 90%          | 91%                |
| RELAYTO                          | 95%                                         | 96%                                     | 95%        | 97%                            | 96%          | 96%                |
| Oneflow                          | 83%                                         | 83%                                     | 77%        | 85%                            | 86%          | 80%                |
| AutogenAI                        | 76%                                         | 69%                                     | 51%        | 67%                            | 60%          | 62%                |
| FastSpring Interactive<br>Quotes |                                             | N/A                                     | N/A        | 93%                            | N/A          | 86%                |
| TaxDome                          | 92%                                         | 87%                                     | 83%        | 79%                            | 80%          | 86%                |
| fynk                             | 100%                                        | 100%                                    | 95%        | 100%                           | 100%         | 100%               |
| Anchor                           | 85%                                         | 90%                                     |            | 84%                            | 89%          | 88%                |
| OnePageCRM                       |                                             |                                         | 89%        |                                |              |                    |
| Smart Pricing Table              | 94%                                         | 97%                                     | 93%        | 97%                            | 94%          | 96%                |
| Minoa                            | 94%                                         | 95%                                     | 90%        | 94%                            | 97%          | 92%                |
| Cacheflow                        | 89%                                         | 89%                                     | 84%        | 90%                            | 92%          | 89%                |

(Feature Comparison for Proposal continues on next page)

\*N/A is displayed when fewer than five responses were received for the question.

\*\*A blank box indicates that a seller has selected that they do not offer that feature.



# Feature Comparison for Proposal (continued)

G2 users have evaluated the following products by feature. Feature ratings are representative of reviewers overall satisfaction with each feature and do not necessarily take into account the breadth of individual product features. The results are shown below.

## Document Creation

|                  | Customizability:<br>Variables and<br>Fields | Template<br>Creation and<br>Flexibility | Rich Media | Online<br>Document<br>Creation | PDF Creation | Custom<br>Branding |
|------------------|---------------------------------------------|-----------------------------------------|------------|--------------------------------|--------------|--------------------|
| AutoRFP.ai       | 93%                                         | 91%                                     | 83%        | 88%                            | 91%          | 84%                |
| Bonsai           | 83%                                         | 87%                                     | 82%        | 89%                            | 89%          | 95%                |
| Cone Propose     | 94%                                         | 92%                                     | 93%        | 93%                            | 93%          | 93%                |
| Ombud            | N/A                                         | N/A                                     | N/A        | N/A                            | N/A          | N/A                |
| Zilliant CPQ     | 96%                                         | 96%                                     | 87%        | 95%                            | 96%          | 95%                |
| Nusii            | 89%                                         | 84%                                     | 83%        | 88%                            | 97%          | 96%                |
| Tango Agreements |                                             |                                         |            | 92%                            | 69%          | 90%                |
| Clientary        | 93%                                         |                                         |            | 92%                            | 94%          | 93%                |
| Flowcase         | 76%                                         | 81%                                     | 80%        | 87%                            | 89%          | 87%                |
| Proposal Kit     | 96%                                         | 92%                                     | 83%        | 84%                            | 98%          | 94%                |
| ScalePad Quoter  | 88%                                         | 88%                                     | 78%        | 94%                            | 91%          | 95%                |
| Fresh Proposals  | 98%                                         | 93%                                     | 88%        | 95%                            | 98%          | 88%                |
| RevOps           | 95%                                         | 93%                                     |            | 95%                            | 95%          | 88%                |
| Tilkee           | 84%                                         | 86%                                     | 90%        | 79%                            | 100%         | 88%                |
| Oracle CPQ       | 83%                                         | 85%                                     | 80%        | 88%                            | 88%          | 90%                |
| DocSend          | 83%                                         |                                         | 86%        |                                |              | 86%                |
| Upland Qvidian   | 83%                                         | 82%                                     | 71%        | 78%                            | 74%          | 81%                |
| Conga Composer   | 88%                                         | 88%                                     | 84%        | 90%                            | 92%          | 91%                |
| ConnectWise CPQ  | 81%                                         | 78%                                     | 83%        | 87%                            | 91%          | 90%                |

(Feature Comparison for Proposal continues on next page)

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# Feature Comparison for Proposal (continued)

G2 users have evaluated the following products by feature. Feature ratings are representative of reviewers overall satisfaction with each feature and do not necessarily take into account the breadth of individual product features. The results are shown below.

## Document Creation

|                                | Customizability:<br>Variables and<br>Fields | Template<br>Creation and<br>Flexibility | Rich Media | Online<br>Document<br>Creation | PDF Creation | Custom<br>Branding |
|--------------------------------|---------------------------------------------|-----------------------------------------|------------|--------------------------------|--------------|--------------------|
| Odoo Sales                     | 93%                                         | 82%                                     | 81%        | 88%                            | 84%          | 83%                |
| Fiverr Workspace               | N/A                                         | N/A                                     | N/A        | N/A                            | N/A          | N/A                |
| Conga CLM                      | 84%                                         | 82%                                     | 80%        | 87%                            | 83%          | 86%                |
| Epicor CPQ                     | 93%                                         | 92%                                     | 87%        | 92%                            | 91%          | 93%                |
| QorusDocs                      | 85%                                         | 86%                                     | 83%        | 87%                            | 86%          | 85%                |
| Nintex                         | 88%                                         | 86%                                     | 80%        | 87%                            | 90%          | 90%                |
| Vendavo                        | 87%                                         | 83%                                     | 82%        | 89%                            | 91%          | 94%                |
| Ideagen PleaseReview           | 81%                                         | 82%                                     | 84%        | 91%                            | 88%          | 90%                |
| Storydoc                       | 83%                                         | 91%                                     | 86%        | 90%                            | 88%          | 89%                |
| Quotient                       | 83%                                         | 81%                                     | 84%        | 95%                            | 97%          | 91%                |
| ClientPoint                    | 88%                                         | 86%                                     | 85%        | 86%                            | 90%          | 89%                |
| Zomentum e-Sign and<br>Payment | 91%                                         | 88%                                     | 85%        | 92%                            | 90%          | 92%                |
| XaitPorter                     | 86%                                         | 86%                                     | 85%        | 93%                            | 93%          | 89%                |
| Ideagen Huddle                 |                                             | 88%                                     | 87%        | 91%                            |              | 86%                |
| QuoteWerks                     | 87%                                         | 85%                                     | 82%        | 89%                            | 94%          | 92%                |
| Revelear                       | 92%                                         | 92%                                     | 90%        | 94%                            | 94%          | 86%                |
| RocketDocs                     | 83%                                         | 83%                                     | 77%        | 83%                            | 82%          | 83%                |
| Better Proposals               | 80%                                         | 83%                                     | 82%        | 87%                            | 77%          | 87%                |
| Pricefx                        | 86%                                         | 79%                                     | 71%        | 76%                            | 83%          | 80%                |

(Feature Comparison for Proposal continues on next page)

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# Feature Comparison for Proposal (continued)

G2 users have evaluated the following products by feature. Feature ratings are representative of reviewers overall satisfaction with each feature and do not necessarily take into account the breadth of individual product features. The results are shown below.

## Document Creation

|            | Customizability:<br>Variables and<br>Fields | Template<br>Creation and<br>Flexibility | Rich Media | Online<br>Document<br>Creation | PDF Creation | Custom<br>Branding |
|------------|---------------------------------------------|-----------------------------------------|------------|--------------------------------|--------------|--------------------|
| Tacton CPQ | 81%                                         | 74%                                     | 70%        | 74%                            | 86%          | 84%                |
| SmartDocs  | 90%                                         | 88%                                     | 87%        |                                | 93%          |                    |
| Bidsketch  | 81%                                         | 79%                                     | 70%        | 84%                            | 82%          | 89%                |
| Revv       | 93%                                         | 88%                                     | 86%        | 92%                            | 100%         | 93%                |
| Proposable | 82%                                         | 82%                                     | 78%        | 85%                            | 84%          | 86%                |
| Privia     | 82%                                         | 82%                                     | 82%        | 79%                            | 75%          | 84%                |
| Average    | 88%                                         | 87%                                     | 83%        | 88%                            | 89%          | 89%                |

(Feature Comparison for Proposal continues on next page)

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# Feature Comparison for Proposal (continued)

G2 users have evaluated the following products by feature. Feature ratings are representative of reviewers overall satisfaction with each feature and do not necessarily take into account the breadth of individual product features. The results are shown below.

## Workflow

|                               | Document Builder Interface | Collaborative Creation | Assembly and Approval Workflows |
|-------------------------------|----------------------------|------------------------|---------------------------------|
| PandaDoc                      | 89%                        | 88%                    | 89%                             |
| Responsive, formerly RFPIO    | 85%                        | 90%                    | 88%                             |
| Proposify                     | 86%                        | 87%                    | 88%                             |
| DealHub.io                    | 91%                        | 92%                    | 94%                             |
| GetAccept                     | 85%                        | 86%                    | 87%                             |
| Qwilr                         | 85%                        | 83%                    | 85%                             |
| Loopio                        | 88%                        | 92%                    | 90%                             |
| Ignition                      | 91%                        | 89%                    | 91%                             |
| RELAYTO                       | 96%                        | 96%                    | 95%                             |
| Oneflow                       | 81%                        | 82%                    | 83%                             |
| AutogenAI                     | 81%                        | 84%                    | 74%                             |
| FastSpring Interactive Quotes | 96%                        | 92%                    | N/A                             |
| TaxDome                       | 88%                        | 87%                    | 93%                             |
| fynk                          | 100%                       | 100%                   | 100%                            |
| Anchor                        | 90%                        | 81%                    | 86%                             |
| OnePageCRM                    |                            | 89%                    |                                 |
| Smart Pricing Table           | 98%                        | 97%                    |                                 |
| Minoa                         | 92%                        | 96%                    | 95%                             |
| Cacheflow                     | 91%                        | 87%                    | 88%                             |

(Feature Comparison for Proposal continues on next page)

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# Feature Comparison for Proposal (continued)

G2 users have evaluated the following products by feature. Feature ratings are representative of reviewers overall satisfaction with each feature and do not necessarily take into account the breadth of individual product features. The results are shown below.

## Workflow

|                  | Document Builder Interface | Collaborative Creation | Assembly and Approval Workflows |
|------------------|----------------------------|------------------------|---------------------------------|
| AutoRFP.ai       | 89%                        | 98%                    | 93%                             |
| Bonsai           | 90%                        | 87%                    | 83%                             |
| Cone Propose     | 93%                        | 97%                    | 92%                             |
| Ombud            | N/A                        | N/A                    | N/A                             |
| Zilliant CPQ     | 97%                        |                        | 97%                             |
| Nusii            | 93%                        |                        |                                 |
| Tango Agreements | 94%                        |                        | 78%                             |
| Clientary        |                            |                        |                                 |
| Flowcase         | 74%                        | 86%                    | 73%                             |
| Proposal Kit     | 91%                        | 90%                    | 94%                             |
| ScalePad Quoter  | 89%                        | 83%                    | 84%                             |
| Fresh Proposals  | 90%                        | 94%                    | 94%                             |
| RevOps           | 92%                        | 90%                    | 90%                             |
| Tilkee           | 97%                        | N/A                    | N/A                             |
| Oracle CPQ       | 85%                        | 79%                    | 86%                             |
| DocSend          |                            | 86%                    |                                 |
| Upland Qvidian   | 76%                        | 78%                    | 76%                             |
| Conga Composer   | 86%                        | 84%                    | 87%                             |
| ConnectWise CPQ  | 78%                        | 80%                    | 80%                             |

(Feature Comparison for Proposal continues on next page)

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# Feature Comparison for Proposal (continued)

G2 users have evaluated the following products by feature. Feature ratings are representative of reviewers overall satisfaction with each feature and do not necessarily take into account the breadth of individual product features. The results are shown below.

## Workflow

|                             | Document Builder Interface | Collaborative Creation | Assembly and Approval Workflows |
|-----------------------------|----------------------------|------------------------|---------------------------------|
| Odoo Sales                  | 68%                        | 88%                    | 73%                             |
| Fiverr Workspace            | N/A                        | N/A                    | N/A                             |
| Conga CLM                   | 80%                        | 79%                    | 79%                             |
| Epicor CPQ                  | 90%                        | 88%                    | 91%                             |
| QorusDocs                   | 86%                        | 88%                    | 85%                             |
| Nintex                      | 83%                        | 79%                    | 82%                             |
| Vendavo                     | 81%                        | 86%                    | 83%                             |
| Ideagen PleaseReview        | 88%                        | 86%                    | 88%                             |
| Storydoc                    | 89%                        | 88%                    | 83%                             |
| Quotient                    | 86%                        | 77%                    | 90%                             |
| ClientPoint                 | 87%                        | 84%                    | 87%                             |
| Zomentum e-Sign and Payment | 88%                        |                        | 88%                             |
| XaitPorter                  | 89%                        | 93%                    | 85%                             |
| Ideagen Huddle              | 89%                        | 91%                    | 89%                             |
| QuoteWerks                  | 83%                        | 83%                    | 85%                             |
| Revolear                    | 92%                        | 96%                    | 92%                             |
| RocketDocs                  | 82%                        | 81%                    | 81%                             |
| Better Proposals            | 81%                        |                        |                                 |
| Pricefx                     | 77%                        | 86%                    | 81%                             |

(Feature Comparison for Proposal continues on next page)

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\*\*A blank box indicates that a seller has selected that they do not offer that feature.



# Feature Comparison for Proposal (continued)

G2 users have evaluated the following products by feature. Feature ratings are representative of reviewers overall satisfaction with each feature and do not necessarily take into account the breadth of individual product features. The results are shown below.

## Workflow

|            | Document Builder Interface | Collaborative Creation | Assembly and Approval Workflows |
|------------|----------------------------|------------------------|---------------------------------|
| Tacton CPQ | 74%                        | 70%                    | 69%                             |
| SmartDocs  | 89%                        | 90%                    | 91%                             |
| Bidsketch  | 73%                        | 68%                    | 76%                             |
| Revv       | 90%                        | 95%                    | 95%                             |
| Proposable | 82%                        | 82%                    | 82%                             |
| Privia     | 81%                        | 82%                    | 86%                             |
| Average    | 87%                        | 87%                    | 86%                             |

(Feature Comparison for Proposal continues on next page)

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\*\*A blank box indicates that a seller has selected that they do not offer that feature.



# Feature Comparison for Proposal (continued)

G2 users have evaluated the following products by feature. Feature ratings are representative of reviewers overall satisfaction with each feature and do not necessarily take into account the breadth of individual product features. The results are shown below.

## Analytics

|                               | Engagement Tracking | Proposal Effectiveness Reporting | Reporting and Dashboards |
|-------------------------------|---------------------|----------------------------------|--------------------------|
| PandaDoc                      | 91%                 | 88%                              | 88%                      |
| Responsive, formerly RFPIO    | 85%                 | 85%                              | 87%                      |
| Proposify                     | 93%                 | 92%                              | 91%                      |
| DealHub.io                    | 91%                 | 89%                              | 86%                      |
| GetAccept                     | 93%                 | 88%                              | 88%                      |
| Qwilr                         | 84%                 | 84%                              | 82%                      |
| Loopio                        |                     |                                  | 85%                      |
| Ignition                      | 90%                 | 90%                              | 91%                      |
| RELAYTO                       | 96%                 | 96%                              | 95%                      |
| Oneflow                       | 84%                 |                                  | 79%                      |
| AutogenAI                     | 65%                 | 61%                              | 60%                      |
| FastSpring Interactive Quotes | 89%                 | 92%                              | 91%                      |
| TaxDome                       | 81%                 | 83%                              | 79%                      |
| fynk                          | 100%                | 100%                             | 100%                     |
| Anchor                        | 84%                 | 77%                              | 87%                      |
| OnePageCRM                    | 87%                 |                                  | 87%                      |
| Smart Pricing Table           | 96%                 | 96%                              | 93%                      |
| Minoa                         | 91%                 | 96%                              | 91%                      |
| Cacheflow                     | 89%                 | 85%                              | 81%                      |

(Feature Comparison for Proposal continues on next page)

\*N/A is displayed when fewer than five responses were received for the question.

\*\*A blank box indicates that a seller has selected that they do not offer that feature.



# Feature Comparison for Proposal (continued)

G2 users have evaluated the following products by feature. Feature ratings are representative of reviewers overall satisfaction with each feature and do not necessarily take into account the breadth of individual product features. The results are shown below.

## Analytics

|                  | Engagement Tracking | Proposal Effectiveness Reporting | Reporting and Dashboards |
|------------------|---------------------|----------------------------------|--------------------------|
| AutoRFP.ai       | 82%                 | 82%                              | 89%                      |
| Bonsai           | 91%                 | 91%                              | 92%                      |
| Cone Propose     | 93%                 | 94%                              | 89%                      |
| Ombud            | N/A                 | N/A                              | N/A                      |
| Zilliant CPQ     | 95%                 |                                  | 90%                      |
| Nusii            | 91%                 | 93%                              | 94%                      |
| Tango Agreements | 83%                 | 86%                              | 86%                      |
| Clientary        |                     |                                  |                          |
| Flowcase         | 68%                 | 70%                              | 67%                      |
| Proposal Kit     |                     | N/A                              | N/A                      |
| ScalePad Quoter  | 84%                 | 88%                              | 83%                      |
| Fresh Proposals  | 97%                 | 93%                              | 97%                      |
| RevOps           | 95%                 |                                  | 87%                      |
| Tilkee           | 93%                 | 96%                              | 84%                      |
| Oracle CPQ       |                     |                                  | 80%                      |
| DocSend          | 94%                 | 92%                              | 91%                      |
| Upland Qvidian   | 72%                 | 73%                              | 77%                      |
| Conga Composer   | 86%                 | 86%                              | 86%                      |
| ConnectWise CPQ  |                     | 78%                              | 78%                      |

(Feature Comparison for Proposal continues on next page)

\*N/A is displayed when fewer than five responses were received for the question.

\*\*A blank box indicates that a seller has selected that they do not offer that feature.



# Feature Comparison for Proposal (continued)

G2 users have evaluated the following products by feature. Feature ratings are representative of reviewers overall satisfaction with each feature and do not necessarily take into account the breadth of individual product features. The results are shown below.

## Analytics

|                             | Engagement Tracking | Proposal Effectiveness Reporting | Reporting and Dashboards |
|-----------------------------|---------------------|----------------------------------|--------------------------|
| Odoo Sales                  | 79%                 | 82%                              | 88%                      |
| Fiverr Workspace            | N/A                 | N/A                              | N/A                      |
| Conga CLM                   |                     |                                  | 83%                      |
| Epicor CPQ                  | 89%                 | 91%                              | 92%                      |
| QorusDocs                   | 85%                 | 82%                              | 81%                      |
| Nintex                      | 74%                 | 81%                              | 82%                      |
| Vendavo                     | N/A                 | 83%                              | 89%                      |
| Ideagen PleaseReview        | 90%                 | 90%                              | 90%                      |
| Storydoc                    | 92%                 | 95%                              | 90%                      |
| Quotient                    | 89%                 | 91%                              | 91%                      |
| ClientPoint                 | 90%                 | 89%                              | 89%                      |
| Zomentum e-Sign and Payment | 92%                 |                                  | 84%                      |
| XaitPorter                  |                     |                                  | 79%                      |
| Ideagen Huddle              | 86%                 | 87%                              | 91%                      |
| QuoteWerks                  | 88%                 | 87%                              | 84%                      |
| Revolear                    | 92%                 | 90%                              | 92%                      |
| RocketDocs                  |                     |                                  | 80%                      |
| Better Proposals            | 91%                 | 89%                              | 87%                      |
| Pricefx                     |                     |                                  | 77%                      |

(Feature Comparison for Proposal continues on next page)

\*N/A is displayed when fewer than five responses were received for the question.

\*\*A blank box indicates that a seller has selected that they do not offer that feature.



# Feature Comparison for Proposal

## (continued)

G2 users have evaluated the following products by feature. Feature ratings are representative of reviewers overall satisfaction with each feature and do not necessarily take into account the breadth of individual product features. The results are shown below.

### Analytics

|            | Engagement Tracking | Proposal Effectiveness Reporting | Reporting and Dashboards |
|------------|---------------------|----------------------------------|--------------------------|
| Tacton CPQ |                     |                                  | 59%                      |
| SmartDocs  | 85%                 | 86%                              | 87%                      |
| Bidsketch  | 80%                 | 71%                              | 73%                      |
| Revv       | 91%                 |                                  | 90%                      |
| Proposable | 91%                 | 89%                              | 86%                      |
| Privia     | 86%                 | 84%                              | 84%                      |
| Average    | 88%                 | 87%                              | 85%                      |

(Feature Comparison for Proposal continues on next page)

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# Feature Comparison for Proposal (continued)

G2 users have evaluated the following products by feature. Feature ratings are representative of reviewers overall satisfaction with each feature and do not necessarily take into account the breadth of individual product features. The results are shown below.

## Administration and Platform

|                               | User, Role, and Access Management | Alerts and Notifications | CRM Integration | E-Signature Integration | CPQ Integration | API / Integrations |
|-------------------------------|-----------------------------------|--------------------------|-----------------|-------------------------|-----------------|--------------------|
| PandaDoc                      | 90%                               | 91%                      | 86%             | 93%                     | 86%             | 86%                |
| Responsive, formerly RFPIO    | 90%                               | 87%                      | 80%             | 79%                     |                 | 80%                |
| Proposify                     | 91%                               | 92%                      | 86%             | 93%                     | 83%             | 85%                |
| DealHub.io                    | 93%                               | 92%                      | 94%             | 96%                     | 95%             | 91%                |
| GetAccept                     | 88%                               | 90%                      | 84%             | 91%                     | 83%             | 86%                |
| Qwilr                         | 86%                               | 86%                      | 79%             | 89%                     | 82%             | 81%                |
| Loopio                        | 93%                               | 91%                      | 84%             |                         |                 | 85%                |
| Ignition                      | 91%                               | 94%                      | 85%             | 94%                     | 87%             | 88%                |
| RELAYTO                       | 97%                               | 93%                      | 95%             | 95%                     | 93%             | 95%                |
| Oneflow                       | 82%                               | 86%                      | 80%             | 87%                     |                 | 80%                |
| AutogenAI                     | 81%                               | 63%                      | 57%             | 53%                     |                 | 59%                |
| FastSpring Interactive Quotes | N/A                               | 93%                      | N/A             | N/A                     |                 | N/A                |
| TaxDome                       | 92%                               | 92%                      | 90%             | 89%                     | 80%             | 84%                |
| fynk                          | 100%                              | 100%                     | 100%            | 100%                    | N/A             | 100%               |
| Anchor                        | 85%                               | 87%                      | 74%             | 94%                     | 75%             | 86%                |
| OnePageCRM                    | 89%                               | 88%                      | 95%             | 86%                     | 83%             | 90%                |
| Smart Pricing Table           | 96%                               | 97%                      | 76%             | 98%                     | 82%             | 79%                |
| Minoa                         | 91%                               | 91%                      | 100%            | 89%                     | 97%             | 94%                |
| Cacheflow                     | 92%                               | 85%                      | 88%             | 95%                     | 90%             | 90%                |

(Feature Comparison for Proposal continues on next page)

\*N/A is displayed when fewer than five responses were received for the question.

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# Feature Comparison for Proposal

## (continued)

G2 users have evaluated the following products by feature. Feature ratings are representative of reviewers overall satisfaction with each feature and do not necessarily take into account the breadth of individual product features. The results are shown below.

### Administration and Platform

|                  | User, Role, and Access Management | Alerts and Notifications | CRM Integration | E-Signature Integration | CPQ Integration | API / Integrations |
|------------------|-----------------------------------|--------------------------|-----------------|-------------------------|-----------------|--------------------|
| AutoRFP.ai       | 95%                               | 95%                      | 82%             | 73%                     | 81%             | 87%                |
| Bonsai           | 91%                               | 87%                      | 82%             | 92%                     | 75%             | 75%                |
| Cone Propose     | 95%                               | 93%                      | 91%             | 97%                     | 95%             | 96%                |
| Ombud            | N/A                               | N/A                      | N/A             | N/A                     | N/A             | N/A                |
| Zilliant CPQ     | 94%                               | 93%                      | 98%             | 98%                     | 97%             | 95%                |
| Nusii            |                                   | 92%                      | 82%             | 94%                     |                 |                    |
| Tango Agreements | 76%                               | 94%                      | N/A             | 88%                     | N/A             | N/A                |
| Clientary        | 93%                               |                          |                 | 92%                     |                 | 93%                |
| Flowcase         | 90%                               | 68%                      | 71%             | 67%                     | 68%             | 75%                |
| Proposal Kit     | 96%                               |                          | 90%             | N/A                     | 91%             |                    |
| ScalePad Quoter  | 93%                               | 92%                      | 89%             | 91%                     | 80%             | 84%                |
| Fresh Proposals  | 95%                               | 100%                     | N/A             | 94%                     | N/A             | N/A                |
| RevOps           | 90%                               | 93%                      | 98%             | 96%                     | 90%             | 96%                |
| Tilkee           | 95%                               | 96%                      | 83%             | 96%                     | N/A             | 91%                |
| Oracle CPQ       | 85%                               | 82%                      | 86%             | 86%                     | 86%             | 83%                |
| DocSend          | 88%                               | 90%                      | 84%             |                         |                 | 83%                |
| Upland Qvidian   | 85%                               | 83%                      | 69%             | 57%                     | 57%             | 66%                |
| Conga Composer   | 89%                               | 85%                      | 93%             | 89%                     | 90%             | 89%                |
| ConnectWise CPQ  | 86%                               | 81%                      | 86%             | 89%                     | 84%             | 83%                |

(Feature Comparison for Proposal continues on next page)

\*N/A is displayed when fewer than five responses were received for the question.

\*\*A blank box indicates that a seller has selected that they do not offer that feature.



# Feature Comparison for Proposal (continued)

G2 users have evaluated the following products by feature. Feature ratings are representative of reviewers overall satisfaction with each feature and do not necessarily take into account the breadth of individual product features. The results are shown below.

## Administration and Platform

|                             | User, Role, and Access Management | Alerts and Notifications | CRM Integration | E-Signature Integration | CPQ Integration | API / Integrations |
|-----------------------------|-----------------------------------|--------------------------|-----------------|-------------------------|-----------------|--------------------|
| Odoo Sales                  | 90%                               | 77%                      | 84%             | 86%                     | 79%             | 86%                |
| Fiverr Workspace            | N/A                               | N/A                      | N/A             | N/A                     | N/A             | N/A                |
| Conga CLM                   | 85%                               | 85%                      | 87%             | 86%                     | 87%             | 87%                |
| Epicor CPQ                  | 88%                               | 89%                      | 92%             | 90%                     | 92%             | 91%                |
| QorusDocs                   | 88%                               | 83%                      | 83%             | 77%                     | 74%             | 84%                |
| Nintex                      | 86%                               | 83%                      | 92%             | 86%                     | 85%             | 86%                |
| Vendavo                     | 86%                               | 86%                      | 87%             | 86%                     | 91%             | 89%                |
| Ideagen PleaseReview        | 86%                               | 88%                      | 86%             | 95%                     | 87%             | 91%                |
| Storydoc                    | 90%                               | 82%                      | 74%             | 74%                     | 75%             | 74%                |
| Quotient                    | 94%                               | 96%                      | N/A             | 84%                     | N/A             | 98%                |
| ClientPoint                 | 89%                               | 88%                      | 81%             | 87%                     |                 | 85%                |
| Zomentum e-Sign and Payment | 92%                               | 93%                      | 86%             | 96%                     |                 | 91%                |
| XaitPorter                  | 87%                               | 79%                      | 78%             | 80%                     | 73%             | 81%                |
| Ideagen Huddle              | 90%                               | 85%                      | 87%             | 87%                     | 84%             | 86%                |
| QuoteWerks                  | 88%                               | 87%                      | 89%             | 90%                     | 89%             | 89%                |
| Revelear                    | 90%                               | 88%                      | 94%             | 96%                     | 90%             | 92%                |
| RocketDocs                  | 85%                               | 80%                      | 81%             |                         | N/A             | 83%                |
| Better Proposals            | 87%                               | 92%                      | 76%             | 88%                     |                 | 75%                |
| Pricefx                     | 80%                               | 84%                      | 77%             | N/A                     |                 |                    |

(Feature Comparison for Proposal continues on next page)

\*N/A is displayed when fewer than five responses were received for the question.

\*\*A blank box indicates that a seller has selected that they do not offer that feature.



# Feature Comparison for Proposal (continued)

G2 users have evaluated the following products by feature. Feature ratings are representative of reviewers overall satisfaction with each feature and do not necessarily take into account the breadth of individual product features. The results are shown below.

## Administration and Platform

|            | User, Role, and Access Management | Alerts and Notifications | CRM Integration | E-Signature Integration | CPQ Integration | API / Integrations |
|------------|-----------------------------------|--------------------------|-----------------|-------------------------|-----------------|--------------------|
| Tacton CPQ | 82%                               | 64%                      | 73%             | 65%                     | 74%             | 71%                |
| SmartDocs  | 88%                               | 88%                      | 81%             |                         |                 | 83%                |
| Bidsketch  | 84%                               | 77%                      | 67%             | 88%                     |                 | 86%                |
| Revv       | 100%                              | 86%                      | 86%             | 100%                    | 100%            | 97%                |
| Proposable | 85%                               | 89%                      | 79%             | 87%                     |                 | 78%                |
| Privia     | 83%                               | 78%                      | 74%             | N/A                     |                 | N/A                |
| Average    | 89%                               | 87%                      | 84%             | 88%                     | 84%             | 85%                |

\*N/A is displayed when fewer than five responses were received for the question.

\*\*A blank box indicates that a seller has selected that they do not offer that feature.



# Additional Data for Proposal

The table below includes a breakdown of the customer segments for each product, as represented by G2 reviewers.

## Customers by Size

|                               | Small Business<br>(50 or fewer emp.) | Mid-Market<br>(51-1000 emp.) | Enterprise<br>( >1000 emp.) |
|-------------------------------|--------------------------------------|------------------------------|-----------------------------|
| PandaDoc                      | 76%                                  | 21%                          | 3%                          |
| Responsive, formerly RFPIO    | 12%                                  | 48%                          | 40%                         |
| Proposify                     | 85%                                  | 13%                          | 2%                          |
| DealHub.io                    | 22%                                  | 67%                          | 10%                         |
| GetAccept                     | 54%                                  | 40%                          | 6%                          |
| Qwilr                         | 84%                                  | 14%                          | 1%                          |
| Loopio                        | 10%                                  | 56%                          | 34%                         |
| Ignition                      | 94%                                  | 4%                           | 1%                          |
| RELAYTO                       | 59%                                  | 29%                          | 12%                         |
| Oneflow                       | 52%                                  | 37%                          | 11%                         |
| AutogenAI                     | 23%                                  | 29%                          | 49%                         |
| FastSpring Interactive Quotes | 69%                                  | 23%                          | 8%                          |
| TaxDome                       | 100%                                 | 0%                           | 0%                          |
| fynk                          | 8%                                   | 75%                          | 17%                         |
| Anchor                        | 100%                                 | 0%                           | 0%                          |
| OnePageCRM                    | 93%                                  | 7%                           | 0%                          |
| Smart Pricing Table           | 95%                                  | 5%                           | 0%                          |
| Minoa                         | 17%                                  | 78%                          | 6%                          |
| Cacheflow                     | 33%                                  | 67%                          | 0%                          |

(Additional Data for Proposal continues on next page)

\*N/A is displayed when data is not publicly available.



## Additional Data for Proposal (continued)

The table below includes a breakdown of the customer segments for each product, as represented by G2 reviewers.

### Customers by Size

|                  | Small Business<br>(50 or fewer emp.) | Mid-Market<br>(51-1000 emp.) | Enterprise<br>( >1000 emp.) |
|------------------|--------------------------------------|------------------------------|-----------------------------|
| AutoRFP.ai       | 29%                                  | 52%                          | 19%                         |
| Bonsai           | 97%                                  | 0%                           | 3%                          |
| Cone Propose     | 93%                                  | 7%                           | 0%                          |
| Ombud            | 0%                                   | 48%                          | 52%                         |
| Zilliant CPQ     | 44%                                  | 6%                           | 50%                         |
| Nusii            | 96%                                  | 0%                           | 4%                          |
| Tango Agreements | 100%                                 | 0%                           | 0%                          |
| Clientary        | 59%                                  | 19%                          | 22%                         |
| Flowcase         | 45%                                  | 27%                          | 27%                         |
| Proposal Kit     | 78%                                  | 11%                          | 11%                         |
| ScalePad Quoter  | 90%                                  | 10%                          | 0%                          |
| Fresh Proposals  | 93%                                  | 7%                           | 0%                          |
| RevOps           | 41%                                  | 59%                          | 0%                          |
| Tilkee           | 55%                                  | 36%                          | 9%                          |
| Oracle CPQ       | 17%                                  | 29%                          | 55%                         |
| DocSend          | 79%                                  | 17%                          | 4%                          |
| Upland Qvidian   | 9%                                   | 30%                          | 61%                         |
| Conga Composer   | 26%                                  | 51%                          | 23%                         |
| ConnectWise CPQ  | 54%                                  | 43%                          | 3%                          |

(Additional Data for Proposal continues on next page)

\*N/A is displayed when data is not publicly available.



## Additional Data for Proposal (continued)

The table below includes a breakdown of the customer segments for each product, as represented by G2 reviewers.

### Customers by Size

|                             | Small Business<br>(50 or fewer emp.) | Mid-Market<br>(51-1000 emp.) | Enterprise<br>( >1000 emp.) |
|-----------------------------|--------------------------------------|------------------------------|-----------------------------|
| Odoo Sales                  | 46%                                  | 46%                          | 8%                          |
| Fiverr Workspace            | 94%                                  | 6%                           | 0%                          |
| Conga CLM                   | 37%                                  | 45%                          | 18%                         |
| Epicor CPQ                  | 7%                                   | 51%                          | 42%                         |
| QorusDocs                   | 18%                                  | 31%                          | 50%                         |
| Nintex                      | 36%                                  | 40%                          | 24%                         |
| Vendavo                     | 27%                                  | 52%                          | 21%                         |
| Ideagen PleaseReview        | 30%                                  | 43%                          | 26%                         |
| Storydoc                    | 89%                                  | 11%                          | 0%                          |
| Quotient                    | 100%                                 | 0%                           | 0%                          |
| ClientPoint                 | 33%                                  | 35%                          | 32%                         |
| Zomentum e-Sign and Payment | 97%                                  | 3%                           | 0%                          |
| XaitPorter                  | 13%                                  | 53%                          | 34%                         |
| Ideagen Huddle              | 27%                                  | 34%                          | 39%                         |
| QuoteWerks                  | 77%                                  | 16%                          | 7%                          |
| Revelear                    | 20%                                  | 80%                          | 0%                          |
| RocketDocs                  | 14%                                  | 56%                          | 30%                         |
| Better Proposals            | 98%                                  | 2%                           | 0%                          |
| Pricefx                     | 11%                                  | 28%                          | 61%                         |

(Additional Data for Proposal continues on next page)

\*N/A is displayed when data is not publicly available.



# Additional Data for Proposal (continued)

The table below includes a breakdown of the customer segments for each product, as represented by G2 reviewers.

## Customers by Size

|            | Small Business<br>(50 or fewer emp.) | Mid-Market<br>(51-1000 emp.) | Enterprise<br>( >1000 emp.) |
|------------|--------------------------------------|------------------------------|-----------------------------|
| Tacton CPQ | 14%                                  | 19%                          | 68%                         |
| SmartDocs  | 53%                                  | 20%                          | 27%                         |
| Bidsketch  | 73%                                  | 18%                          | 9%                          |
| Revv       | 62%                                  | 14%                          | 24%                         |
| Proposable | 55%                                  | 34%                          | 11%                         |
| Privia     | 0%                                   | 47%                          | 53%                         |
| Average    | 53%                                  | 29%                          | 18%                         |

(Additional Data for Proposal continues on next page)

\*N/A is displayed when data is not publicly available.



## Additional Data for Proposal (continued)

The table below highlights implementation and deployment data as indicated in real user reviews on G2.

### Implementation

|                               | Deployment |             | Implementation Time    | Implementation Method |                      |                        |            | Contract Term               |
|-------------------------------|------------|-------------|------------------------|-----------------------|----------------------|------------------------|------------|-----------------------------|
|                               | Cloud      | On-Premises | Avg. Months to Go Live | In-House Team         | Seller Services Team | Third-Party Consultant | Don't know | Avg. Contract Term (Months) |
| PandaDoc                      | 100%       | 0%          | 1.0                    | 90%                   | 3%                   | 1%                     | 6%         | 7                           |
| Responsive, formerly RFPIO    | 79%        | 21%         | 1.8                    | 69%                   | 13%                  | 0%                     | 17%        | 19                          |
| Proposify                     | 59%        | 41%         | 0.8                    | 91%                   | 4%                   | 1%                     | 5%         | 5                           |
| DealHub.io                    | 86%        | 14%         | 3.3                    | 54%                   | 35%                  | 3%                     | 8%         | 17                          |
| GetAccept                     | 71%        | 29%         | 1.2                    | 64%                   | 26%                  | 1%                     | 10%        | 12                          |
| Qwilr                         | 66%        | 34%         | 0.5                    | 93%                   | 3%                   | 0%                     | 4%         | 4                           |
| Loopio                        | 74%        | 26%         | 1.5                    | 68%                   | 14%                  | 1%                     | 17%        | 16                          |
| Ignition                      | 72%        | 28%         | 0.9                    | 77%                   | 8%                   | 0%                     | 15%        | 5                           |
| RELAYTO                       | 61%        | 39%         | 0.6                    | 69%                   | 13%                  | 13%                    | 6%         | 10                          |
| Oneflow                       | 67%        | 33%         | 1.7                    | 75%                   | 10%                  | 0%                     | 16%        | 9                           |
| AutogenAI                     | 38%        | 62%         | 0.6                    | 58%                   | 17%                  | 8%                     | 17%        | 15                          |
| FastSpring Interactive Quotes | 75%        | 25%         | 0.1                    | 80%                   | 10%                  | 0%                     | 10%        | N/A                         |
| TaxDome                       | 83%        | 17%         | 2.0                    | 94%                   | 0%                   | 6%                     | 0%         | 17                          |
| fynk                          | 100%       | 0%          | 0.6                    | 63%                   | 38%                  | 0%                     | 0%         | 8                           |
| Anchor                        | 94%        | 6%          | 1.0                    | 81%                   | 13%                  | 0%                     | 6%         | 1                           |
| OnePageCRM                    | 89%        | 11%         | 0.1                    | 100%                  | 0%                   | 0%                     | 0%         | 6                           |
| Smart Pricing Table           | 67%        | 33%         | 0.2                    | 94%                   | 0%                   | 0%                     | 6%         | 1                           |
| Minoa                         | 100%       | 0%          | 0.5                    | 100%                  | 0%                   | 0%                     | 0%         | N/A                         |
| Cacheflow                     | 80%        | 20%         | 1.4                    | 82%                   | 0%                   | 0%                     | 18%        | 18                          |

(Additional Data for Proposal continues on next page)

\*N/A is displayed when data is not publicly available.



## Additional Data for Proposal (continued)

The table below highlights implementation and deployment data as indicated in real user reviews on G2.

### Implementation

|                  | Deployment |             | Implementation Time    | Implementation Method |                      |                        |            | Contract Term               |
|------------------|------------|-------------|------------------------|-----------------------|----------------------|------------------------|------------|-----------------------------|
|                  | Cloud      | On-Premises | Avg. Months to Go Live | In-House Team         | Seller Services Team | Third-Party Consultant | Don't know | Avg. Contract Term (Months) |
| AutoRFP.ai       | 100%       | 0%          | 0.9                    | 80%                   | 20%                  | 0%                     | 0%         | 11                          |
| Bonsai           | 33%        | 67%         | 0.4                    | 83%                   | 0%                   | 0%                     | 17%        | 6                           |
| Cone Propose     | N/A        | N/A         | N/A                    | N/A                   | N/A                  | N/A                    | N/A        | N/A                         |
| Ombud            | 80%        | 20%         | N/A                    | 40%                   | 20%                  | 0%                     | 40%        | N/A                         |
| Zilliant CPQ     | 90%        | 10%         | 9.8                    | 46%                   | 15%                  | 8%                     | 31%        | N/A                         |
| Nusii            | 78%        | 22%         | 0.2                    | 100%                  | 0%                   | 0%                     | 0%         | 9                           |
| Tango Agreements | 40%        | 60%         | 0.2                    | 80%                   | 20%                  | 0%                     | 0%         | 1                           |
| Clientary        | 100%       | 0%          | 0.0                    | 86%                   | 14%                  | 0%                     | 0%         | 2                           |
| Flowcase         | 67%        | 33%         | 4.0                    | 55%                   | 9%                   | 0%                     | 36%        | 10                          |
| Proposal Kit     | 0%         | 100%        | 0.6                    | 100%                  | 0%                   | 0%                     | 0%         | 0                           |
| ScalePad Quoter  | 88%        | 13%         | 0.9                    | 88%                   | 13%                  | 0%                     | 0%         | 7                           |
| Fresh Proposals  | 100%       | 0%          | 0.1                    | 83%                   | 0%                   | 0%                     | 17%        | N/A                         |
| RevOps           | 75%        | 25%         | 1.3                    | 92%                   | 8%                   | 0%                     | 0%         | 10                          |
| Tilkee           | 83%        | 17%         | 3.0                    | 100%                  | 0%                   | 0%                     | 0%         | N/A                         |
| Oracle CPQ       | 73%        | 27%         | 7.3                    | 33%                   | 29%                  | 33%                    | 5%         | 27                          |
| DocSend          | 58%        | 42%         | 0.5                    | 93%                   | 1%                   | 1%                     | 4%         | 8                           |
| Upland Qvidian   | 100%       | 0%          | 3.9                    | 59%                   | 17%                  | 2%                     | 22%        | 21                          |
| Conga Composer   | 100%       | 0%          | 3.0                    | 68%                   | 12%                  | 15%                    | 5%         | 16                          |
| ConnectWise CPQ  | 100%       | 0%          | 2.7                    | 53%                   | 45%                  | 0%                     | 2%         | 9                           |

(Additional Data for Proposal continues on next page)

\*N/A is displayed when data is not publicly available.



## Additional Data for Proposal (continued)

The table below highlights implementation and deployment data as indicated in real user reviews on G2.

### Implementation

|                             | Deployment |             | Implementation Time    | Implementation Method |                      |                        |            | Contract Term               |
|-----------------------------|------------|-------------|------------------------|-----------------------|----------------------|------------------------|------------|-----------------------------|
|                             | Cloud      | On-Premises | Avg. Months to Go Live | In-House Team         | Seller Services Team | Third-Party Consultant | Don't know | Avg. Contract Term (Months) |
| Odoo Sales                  | 100%       | 0%          | N/A                    | 67%                   | 33%                  | 0%                     | 0%         | N/A                         |
| Fiverr Workspace            | N/A        | N/A         | N/A                    | N/A                   | N/A                  | N/A                    | N/A        | N/A                         |
| Conga CLM                   | 90%        | 10%         | 2.5                    | 80%                   | 15%                  | 3%                     | 2%         | 14                          |
| Epicor CPQ                  | 72%        | 28%         | 10.3                   | 63%                   | 34%                  | 3%                     | 0%         | 21                          |
| QorusDocs                   | 78%        | 22%         | 4.2                    | 66%                   | 14%                  | 2%                     | 19%        | 15                          |
| Nintex                      | 78%        | 22%         | 1.6                    | 69%                   | 12%                  | 18%                    | 1%         | 12                          |
| Vendavo                     | 100%       | 0%          | 4.6                    | 72%                   | 22%                  | 6%                     | 0%         | 18                          |
| Ideagen PleaseReview        | 63%        | 38%         | N/A                    | 63%                   | 13%                  | 25%                    | 0%         | N/A                         |
| Storydoc                    | 50%        | 50%         | 0.5                    | 100%                  | 0%                   | 0%                     | 0%         | 2                           |
| Quotient                    | N/A        | N/A         | N/A                    | N/A                   | N/A                  | N/A                    | N/A        | N/A                         |
| ClientPoint                 | 100%       | 0%          | 1.5                    | 67%                   | 33%                  | 0%                     | 0%         | 6                           |
| Zomentum e-Sign and Payment | 100%       | 0%          | 0.3                    | 70%                   | 30%                  | 0%                     | 0%         | 2                           |
| XaitPorter                  | 85%        | 15%         | 2.1                    | 62%                   | 31%                  | 8%                     | 0%         | 21                          |
| Ideagen Huddle              | 100%       | 0%          | 0.8                    | 67%                   | 20%                  | 0%                     | 13%        | 10                          |
| QuoteWerks                  | 0%         | 100%        | 0.7                    | 87%                   | 13%                  | 0%                     | 0%         | 8                           |
| Revelear                    | N/A        | N/A         | N/A                    | N/A                   | N/A                  | N/A                    | N/A        | N/A                         |
| RocketDocs                  | 44%        | 56%         | 3.4                    | 56%                   | 28%                  | 4%                     | 12%        | 14                          |
| Better Proposals            | 92%        | 8%          | 1.7                    | 89%                   | 11%                  | 0%                     | 0%         | 7                           |
| Pricefx                     | 82%        | 18%         | 4.7                    | 45%                   | 36%                  | 18%                    | 0%         | 16                          |

(Additional Data for Proposal continues on next page)

\*N/A is displayed when data is not publicly available.



## Additional Data for Proposal (continued)

The table below highlights implementation and deployment data as indicated in real user reviews on G2.

### Implementation

|                   | Deployment |             | Implementation Time    | Implementation Method |                      |                        |            | Contract Term               |
|-------------------|------------|-------------|------------------------|-----------------------|----------------------|------------------------|------------|-----------------------------|
|                   | Cloud      | On-Premises | Avg. Months to Go Live | In-House Team         | Seller Services Team | Third-Party Consultant | Don't know | Avg. Contract Term (Months) |
| <b>Tacton CPQ</b> | 42%        | 58%         | 9.4                    | 57%                   | 25%                  | 7%                     | 11%        | 21                          |
| <b>SmartDocs</b>  | 40%        | 60%         | N/A                    | N/A                   | N/A                  | N/A                    | N/A        | N/A                         |
| <b>Bidsketch</b>  | N/A        | N/A         | N/A                    | N/A                   | N/A                  | N/A                    | N/A        | N/A                         |
| <b>Revv</b>       | N/A        | N/A         | N/A                    | N/A                   | N/A                  | N/A                    | N/A        | N/A                         |
| <b>Proposable</b> | 78%        | 22%         | 0.5                    | 95%                   | 5%                   | 0%                     | 0%         | 2                           |
| <b>Privia</b>     | 20%        | 80%         | N/A                    | N/A                   | N/A                  | N/A                    | N/A        | N/A                         |

(Additional Data for Proposal continues on next page)

\*N/A is displayed when data is not publicly available.



## Additional Data for Proposal (continued)

The table below highlights the average user adoption of each product as indicated in real user reviews on G2.

### User Adoption and Return on Investment (ROI)

|                               | User Adoption         | Payback Period                              |
|-------------------------------|-----------------------|---------------------------------------------|
|                               | Average User Adoption | Estimated ROI<br>(payback period in months) |
| PandaDoc                      | 80%                   | 8                                           |
| Responsive, formerly RFPIO    | 59%                   | 11                                          |
| Proposify                     | 80%                   | 6                                           |
| DealHub.io                    | 76%                   | 9                                           |
| GetAccept                     | 78%                   | 10                                          |
| Qwilr                         | 77%                   | 7                                           |
| Loopio                        | 69%                   | 9                                           |
| Ignition                      | 76%                   | 7                                           |
| RELAYTO                       | 51%                   | 13                                          |
| Oneflow                       | 81%                   | 14                                          |
| AutogenAI                     | 56%                   | 2                                           |
| FastSpring Interactive Quotes | 69%                   | 3                                           |
| TaxDome                       | 86%                   | 6                                           |
| fynk                          | 94%                   | 4                                           |
| Anchor                        | 98%                   | 3                                           |
| OnePageCRM                    | 87%                   | 3                                           |
| Smart Pricing Table           | 76%                   | 3                                           |
| Minoa                         | 95%                   | 4                                           |
| Cacheflow                     | 78%                   | 8                                           |

(Additional Data for Proposal continues on next page)

\*N/A is displayed when data is not publicly available.



# Additional Data for Proposal (continued)

The table below highlights the average user adoption of each product as indicated in real user reviews on G2.

## User Adoption and Return on Investment (ROI)

|                  | User Adoption         | Payback Period                              |
|------------------|-----------------------|---------------------------------------------|
|                  | Average User Adoption | Estimated ROI<br>(payback period in months) |
| AutoRFP.ai       | 80%                   | 5                                           |
| Bonsai           | 85%                   | 12                                          |
| Cone Propose     | N/A                   | N/A                                         |
| Ombud            | N/A                   | N/A                                         |
| Zilliant CPQ     | 60%                   | N/A                                         |
| Nusii            | 97%                   | 3                                           |
| Tango Agreements | 98%                   | 3                                           |
| Clientary        | 78%                   | 4                                           |
| Flowcase         | 77%                   | N/A                                         |
| Proposal Kit     | N/A                   | 3                                           |
| ScalePad Quoter  | 100%                  | 13                                          |
| Fresh Proposals  | N/A                   | N/A                                         |
| RevOps           | 98%                   | 6                                           |
| Tilkee           | 71%                   | 5                                           |
| Oracle CPQ       | 58%                   | 28                                          |
| DocSend          | 64%                   | 8                                           |
| Upland Qvidian   | 66%                   | 19                                          |
| Conga Composer   | 65%                   | 13                                          |
| ConnectWise CPQ  | 76%                   | 14                                          |

(Additional Data for Proposal continues on next page)

\*N/A is displayed when data is not publicly available.



# Additional Data for Proposal (continued)

The table below highlights the average user adoption of each product as indicated in real user reviews on G2.

## User Adoption and Return on Investment (ROI)

|                             | User Adoption         | Payback Period                              |
|-----------------------------|-----------------------|---------------------------------------------|
|                             | Average User Adoption | Estimated ROI<br>(payback period in months) |
| Odoo Sales                  | N/A                   | N/A                                         |
| Fiverr Workspace            | N/A                   | N/A                                         |
| Conga CLM                   | 68%                   | 11                                          |
| Epicor CPQ                  | 51%                   | 20                                          |
| QorusDocs                   | 47%                   | 11                                          |
| Nintex                      | 65%                   | 13                                          |
| Vendavo                     | 73%                   | 14                                          |
| Ideagen PleaseReview        | N/A                   | N/A                                         |
| Storydoc                    | 94%                   | 3                                           |
| Quotient                    | N/A                   | N/A                                         |
| ClientPoint                 | 76%                   | 13                                          |
| Zomentum e-Sign and Payment | 86%                   | 10                                          |
| XaitPorter                  | 64%                   | 11                                          |
| Ideagen Huddle              | 85%                   | N/A                                         |
| QuoteWerks                  | 86%                   | 6                                           |
| Revolear                    | N/A                   | N/A                                         |
| RocketDocs                  | 59%                   | 12                                          |
| Better Proposals            | 77%                   | 10                                          |
| Pricefx                     | 84%                   | 9                                           |

(Additional Data for Proposal continues on next page)

\*N/A is displayed when data is not publicly available.



# Additional Data for Proposal (continued)

The table below highlights the average user adoption of each product as indicated in real user reviews on G2.

## User Adoption and Return on Investment (ROI)

|            | User Adoption         | Payback Period                              |
|------------|-----------------------|---------------------------------------------|
|            | Average User Adoption | Estimated ROI<br>(payback period in months) |
| Tacton CPQ | 66%                   | 34                                          |
| SmartDocs  | N/A                   | N/A                                         |
| Bidsketch  | N/A                   | N/A                                         |
| Revv       | N/A                   | N/A                                         |
| Proposable | 81%                   | 5                                           |
| Privia     | N/A                   | N/A                                         |
| Average    | 76%                   | 9                                           |

(Additional Data for Proposal continues on next page)

\*N/A is displayed when data is not publicly available.



## Additional Data for Proposal (continued)

The table below highlights third-party market presence data used to inform the G2's Market Presence Score that highlights each products impact and influence in the category.

### Market Presence

|                                      | Seller Name         | Year Founded | Employees on LinkedIn (Seller) | LinkedIn Followers |
|--------------------------------------|---------------------|--------------|--------------------------------|--------------------|
| <b>PandaDoc</b>                      | PandaDoc            | 2011         | 796                            | 199,000            |
| <b>Responsive, formerly RFPIO</b>    | Responsive          | 2016         | 633                            | 77,787             |
| <b>Proposify</b>                     | Proposify           | 2012         | 70                             | 12,596             |
| <b>DealHub.io</b>                    | DealHub.io          | 2014         | 244                            | 27,167             |
| <b>GetAccept</b>                     | GetAccept Inc.      | 2015         | 169                            | 15,000             |
| <b>Qwilr</b>                         | Qwilr               | 2014         | 94                             | 11,384             |
| <b>Loopio</b>                        | Loopio Inc.         | 2014         | 294                            | 32,969             |
| <b>Ignition</b>                      | Ignition            | 2011         | 274                            | 33,684             |
| <b>RELAYTO</b>                       | Relayto             | 2023         | 49                             | 1,624              |
| <b>Oneflow</b>                       | Oneflow             | 2012         | 182                            | 13,000             |
| <b>AutogenAI</b>                     | AutogenAI           | 2022         | 200                            | 18,688             |
| <b>FastSpring Interactive Quotes</b> | FastSpring          | 2005         | 157                            | 11,211             |
| <b>TaxDome</b>                       | TaxDome             | 2017         | 252                            | 7,520              |
| <b>fynk</b>                          | fynk GmbH           | 2022         | 28                             | 1,366              |
| <b>Anchor</b>                        | Anchor              |              | 60                             | 6,512              |
| <b>OnePageCRM</b>                    | OnePageCRM          | 2010         | 23                             | 3,875              |
| <b>Smart Pricing Table</b>           | Smart Pricing Table | 2020         | 7                              | 940                |
| <b>Minoa</b>                         | Minoa               | 2023         | 14                             | 1,292              |
| <b>Cacheflow</b>                     | Cacheflow           | 2021         | 23                             | 3,864              |

(Additional Data for Proposal continues on next page)

\*N/A is displayed when data is not publicly available.



## Additional Data for Proposal (continued)

The table below highlights third-party market presence data used to inform the G2's Market Presence Score that highlights each products impact and influence in the category.

### Market Presence

|                  | Seller Name                    | Year Founded | Employees on LinkedIn (Seller) | LinkedIn Followers |
|------------------|--------------------------------|--------------|--------------------------------|--------------------|
| AutoRFP.ai       | AutoRFP.ai                     | 2022         | 8                              | 1,749              |
| Bonsai           | Bonsai (YC W16)                | 2015         | 51                             | 5,925              |
| Cone Propose     | Cone                           | 2022         | 15                             | 4,549              |
| Ombud            | Ombud                          | 2011         | 45                             | 2,756              |
| Zilliant CPQ     | Zilliant                       | 1999         | 239                            | 32,806             |
| Nusii            | Nusii                          | 2013         | 1                              | 27                 |
| Tango Agreements | Tango Agreements               | 2022         | 8                              | 413                |
| Clientary        | Unbrew                         | 2008         | 1                              | 21                 |
| Flowcase         | Flowcase (formerly CV Partner) | 2012         | 51                             | 2,060              |
| Proposal Kit     | Proposal Kit                   | 1997         | 3                              | 73                 |
| ScalePad Quoter  | ScalePad                       | 2015         | 243                            | 7,126              |
| Fresh Proposals  | Fresh Proposals                | 2019         | 8                              | 326                |
| RevOps           | RevOps                         | 2018         | 9                              | 2,095              |
| Tilkee           | Tilkee                         | 2014         | 6                              | 5,031              |
| Oracle CPQ       | Oracle                         | 1977         | 204,855                        | 10,196,173         |
| DocSend          | Dropbox                        | 2007         | 3,595                          | 477,740            |
| Upland Qvidian   | Upland Software                | 2010         | 954                            | 23,656             |
| Conga Composer   | Conga                          | 2006         | 1,828                          | 162,119            |
| ConnectWise CPQ  | ConnectWise                    | 1982         | 3,224                          | 171,372            |

(Additional Data for Proposal continues on next page)

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## Additional Data for Proposal (continued)

The table below highlights third-party market presence data used to inform the G2's Market Presence Score that highlights each products impact and influence in the category.

### Market Presence

|                                    | Seller Name         | Year Founded | Employees on LinkedIn (Seller) | LinkedIn Followers |
|------------------------------------|---------------------|--------------|--------------------------------|--------------------|
| <b>Odoo Sales</b>                  | Odoo                | 2005         | 6,171                          | 397,702            |
| <b>Fiverr Workspace</b>            | Fiverr              | 2010         | 212,456                        | 1,420,452          |
| <b>Conga CLM</b>                   | Conga               | 2006         | 1,828                          | 162,119            |
| <b>Epicor CPQ</b>                  | Epicor              | 1972         | 5,845                          | 143,000            |
| <b>QorusDocs</b>                   | QorusDocs           | 2012         | 60                             | 5,253              |
| <b>Nintex</b>                      | Nintex              | 2006         | 1,226                          | 53,158             |
| <b>Vendavo</b>                     | Vendavo             | 1998         | 527                            | 48,490             |
| <b>Ideagen PleaseReview</b>        | Ideagen             | 2000         | 1,193                          | 26,824             |
| <b>Storydoc</b>                    | Storydoc            | 2019         | 26                             | 1,503              |
| <b>Quotient</b>                    | Quotient            | 2011         | 2                              | 157                |
| <b>ClientPoint</b>                 | ClientPoint         | 2009         | 30                             | 6,353              |
| <b>Zomentum e-Sign and Payment</b> | Zomentum            | 2018         | 70                             | 32,541             |
| <b>XaitPorter</b>                  | Xait                | 2000         | 89                             | 6,425              |
| <b>Ideagen Huddle</b>              | Ideagen             | 2000         | 1,193                          | 26,824             |
| <b>QuoteWerks</b>                  | Aspire Technologies | 1993         | 48                             | 1,206              |
| <b>Revolear</b>                    | Revolear            | 2022         | 9                              | 1,135              |
| <b>RocketDocs</b>                  | RocketDocs          | 1994         | 26                             | 2,109              |
| <b>Better Proposals</b>            | Better Proposals    | 2009         | 8                              | 1,419              |
| <b>Pricefx</b>                     | Pricefx             | 2011         | 424                            | 24,588             |

(Additional Data for Proposal continues on next page)

\*N/A is displayed when data is not publicly available.



# Additional Data for Proposal (continued)

The table below highlights third-party market presence data used to inform the G2's Market Presence Score that highlights each products impact and influence in the category.

## Market Presence

|            | Seller Name        | Year Founded | Employees on LinkedIn (Seller) | LinkedIn Followers |
|------------|--------------------|--------------|--------------------------------|--------------------|
| Tacton CPQ | Tacton             | 1998         | 222                            | 8,509              |
| SmartDocs  | ThirtySix Software | 2009         | 4                              | 176                |
| Bidsketch  | SignWell           | 2010         | 3                              | 134                |
| Revv       | Revv               | 2018         | 17                             | 7,838              |
| Proposable | Proposable         | 2009         | 1                              | 203                |
| Privia     | Privia             |              | 2                              | 1                  |

\*N/A is displayed when data is not publicly available.