



THE CPQ SOFTWARE READINESS CHECKLIST:

HOW TO GET STARTED



<input checked="" type="checkbox"/>		Outsourcing Finance Services 1 year ▾	\$2499.00 \$2249.00
<input type="checkbox"/>		Additional Services Pack - 2 +	\$500.00 \$0.00



The sales process has never been more complex. With products and services offering endless options and customizations, creating accurate quotes can quickly become a bottleneck for sales teams.



The result? Slower sales cycles, increased errors, and frustrated customers — all of which can cost your business valuable deals.



CPQ (configure, price, quote) software helps sales teams generate accurate quotes quickly, reducing manual errors and accelerating deal cycles.

Frequently asked questions

1. What is CPQ?

CPQ, or configure, price, quote, refers to the process sales teams use to configure product listings, establish pricing, and generate quotes. This method streamlines the quoting process for complex product and service offerings.

2. Who Needs CPQ?

A CPQ system can help your team if any of the following apply:

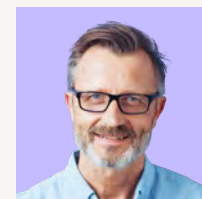
- You have an extensive product catalog.
- You manage a high volume of quotes.
- You have customers with custom or unique needs.
- You create quotes for complex, configurable products.

3. What are Some Use Cases for CPQ Software?



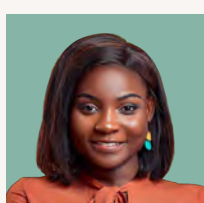
REVOPS

Empowers sales with pricing rules and guidance for accurate, compliant quotes, accelerating sales cycles.



FINANCE

Delivers accurate contract insights for forecasting and informed decisions through a unified dashboard.



SALES

Reduces errors and speeds up the sales cycle by enabling quick, accurate quotes.



IT TEAMS

Connects CPQ with CRM and ERP systems for better scalability and data flow.

How to get started with CPQ software

STEP 1 | ASSESS YOUR BUSINESS NEEDS

- ☐ Do you have a high volume of errors in quotes?
- ☐ Do you have an extensive product catalog with customizable options?
- ☐ Do you frequently manage complex pricing models (e.g., tiered, volume-based, bundles)?
- ☐ Are manual quoting and convoluted approval processes slowing down your sales cycle?
- ☐ Are your sales and RevOps teams struggling with accuracy and timely quotes?

STEP 2 | DEMONSTRATE ROI TO STAKEHOLDERS

- ☐ **Gather case studies**
Ask software vendors for case studies and user stories on how their platform has helped similar organizations.
- ☐ **Address specific challenges**
Show stakeholders how CPQ tools streamline contract creation, quoting, approval, and the signing process.
- ☐ **Provide measurable outcomes**
Calculate time that will be saved by automating processes and error reduction rate. Gather pain points from internal stakeholders to support your case.
- ☐ **Assess analytics**
Ensure the platform has data-tracking features to measure proposal engagement and performance.

STEP 3 | IDENTIFY ESSENTIAL FEATURES THAT SOLVE PAIN POINTS

- ☐ **Dynamic pricing**
Adjust product prices in real time based on market data and competitor insights.
- ☐ **Guided selling**
Use step-by-step forms with conditional logic for faster, more accurate quotes.
- ☐ **Rules engine**
Set pricing and product rules for cross-sells, upsells, discounts, and bundles.
- ☐ **Living documents**
Leverage a system that provides living documents so your sales team can edit and make changes until it ships.
- ☐ **CRM integration**
Sync data from platforms like HubSpot and Salesforce to create quotes without switching apps.
- ☐ **Reporting and analytics**
Track quotes and sales performance in real time.
- ☐ **Security and access controls**
Ensure sensitive data is protected with encryption and user permissions.



STEP 4 | CAREFULLY EVALUATE VENDORS

- ☐ Does the vendor have positive user reviews? (G2, Capterra, etc?)
- ☐ Are they recognized as a top CPQ solution by trusted industry sources?
- ☐ Do they offer transparent pricing and flexible plans?
- ☐ Can they support your business size and scale as you grow?
- ☐ Do they provide a customized demo for evaluation?

STEP 5 | CONSIDER IMPLEMENTATION AND SUPPORT

- ☐ What's the expected implementation timeline (weeks vs. months)?
- ☐ Does the vendor provide onboarding support and training?
- ☐ How user-friendly is the platform? Does it require technical expertise?
- ☐ What level of customer support is available (live chat, phone, email)?
- ☐ Does the platform offer ongoing product training and troubleshooting assistance?

NEXT STEPS 

NEXT STEPS:

1. Get started with **PandaDoc CPQ** today!
2. Watch your close rates soar!

[GET STARTED WITH PANDADOC →](#)

