

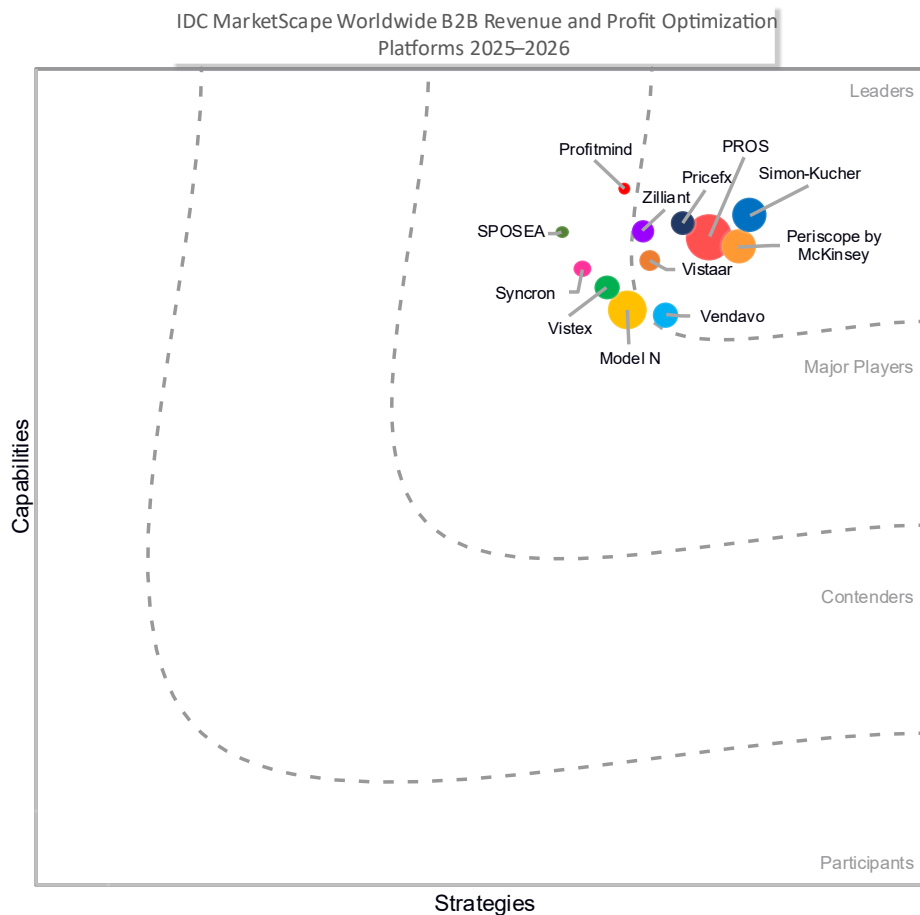
IDC MarketScape: Worldwide B2B Revenue and Profit Optimization Platforms 2025–2026 Vendor Assessment

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IDC MARKETScape FIGURE

FIGURE 1

IDC MarketScape: Worldwide B2B Revenue and Profit Optimization Platforms 2025–2026 Vendor Assessment



Source: IDC, 2025

Please see the Appendix for the detailed methodology, market definition, and scoring criteria.

IDC OPINION

For a company to confidently achieve its revenue, margin, or profit goals in 2026 and beyond, pricing must evolve from manual management or back-office administration to proactive orchestration of data, analytics, and automation across channels. Technology buyers should expect platforms that leverage rich, multisource data to drive highly automated, algorithmic pricing decisions, integrating analytics, forecasting, ML, and optimization science to achieve margin, inventory, and revenue goals across sales channels and geographies.

Based on extensive research with vendors and direct customer experience data, IDC finds that the most advanced B2B revenue and profit optimization (R&PO) platforms combine robust core pricing and optimization capabilities with intuitive, role-based interfaces that support enterprisewide strategic pricing governance, seamless deal management, and channel-agnostic execution. This research assesses each vendor's ability to provide scalable pricing automation, optimization, advanced analytics, forecasting, and explainable AI, as well as flexibility, transparency, and actionable intelligence — allowing organizations not only to manage price but also to integrate across sales, finance, product, and digital commerce systems.

These platforms analyze internal and external data, such as customer behavior, competitive prices, and inventory levels, to recommend optimal prices that balance profitability, competitiveness, and governance. Modern R&PO platforms represent a significant leap beyond spreadsheet-based workflows by enabling explainable, scalable, and real-time pricing aligned with corporate strategy.

Summary of Key Trends in the B2B Revenue and Pricing Optimization Market

As pricing becomes a board-level growth lever, B2B enterprises face growing pressure to manage margin leakage, competitive volatility, and product complexity in real time. Customer feedback consistently highlights tangible business outcomes where their company dramatically improves the pricing process and the product more than pays for itself within three months. Customers reported that automated pricing systems have enabled them to process millions of price changes within a single year, protecting margins during volatile cost cycles that would have been unmanageable under manual processes. Others cited measurable profit gains, such as several millions of dollars in incremental sales and profit, achieved within months of deployment. In complex deal environments, advanced analytics and dynamic scoring capabilities have provided

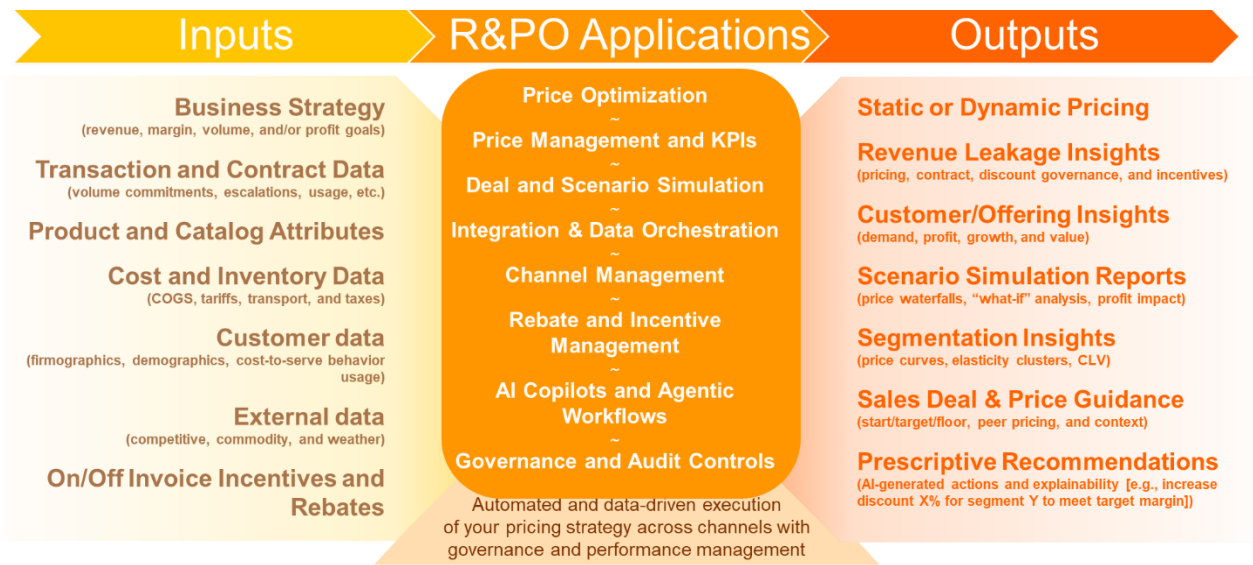
visibility into discounting behaviors and opportunities that were previously invisible, resulting in stronger governance and improved gross profit realization. IDC's analysis highlights the following key trends shaping the market in 2025:

- **Excel's influence is fading but still formidable:** Vendors still compete against spreadsheet inertia, but it is steadily giving way to modern R&PO systems as organizations demand faster reaction times, stronger governance, and greater complexity.
- **AI is everywhere, but explainability is critical:** Pricing is already complex, and AI adds another layer of opacity. Buyers increasingly demand explainable models and human-in-the-loop control to understand and trust algorithmic pricing decisions.
- **User experience drives adoption:** Speed to market, configurable workflows, "glass box" pricing engines, flexible price waterfalls, and scenario simulation differentiate the UX, helping organizations accelerate change management and maximize adoption.
- **From price management to commercial orchestration:** R&PO vendors are expanding into full revenue and profit optimization suites, unifying pricing, rebates, and quoting to drive holistic commercial outcomes.
- **Midmarket expansion is accelerating:** Vendors are introducing modular deployments, preconfigured industry templates, and rapid time-to-value offerings to serve midsize enterprises with lower revenue and less complexity.

Figure 2 illustrates revenue and profit optimization applications.

FIGURE 2

Revenue and Profit Optimization Applications



Source: IDC, 2025

In addition to these foundational advancements, IDC's research highlights that the R&PO platforms work to distinguish themselves through their varying approaches to extensive integration capabilities, industry-specific solutions, and customer-centric change management. The ability to connect seamlessly with core enterprise systems, such as CRM, ERP, commerce, and inventory platforms, accelerates deployment and enables unified pricing logic and process efficiency across global businesses. Digital transformation pressures and channel convergence further require platforms to be adaptable, supporting traditional sales, ecommerce, B2B2C, and partner channels with transparent, auditable workflows that empower both frontline and strategic executives. Importantly, feedback from enterprise customers underscores that they can achieve the most significant value when platforms deliver both automation and insight, allowing organizations to simulate, measure, and adjust pricing strategies with real-time agility and governance. As companies strive to optimize profitability amid ongoing disruption, competitive intensity, and margin uncertainty, R&PO solutions are evolving from transactional tools to strategic enablers of enterprisewide growth, risk mitigation, and commercial innovation.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

The vendor list selection for this evaluation depicts the vendors that are most representative of any given B2B R&PO application buyer's selection short list. Inclusion criteria include:

- The vendor has an active customer base, and other R&PO vendors report it as shown in deals.
- Customers can purchase and use the vendor's R&PO application separately from a larger suite of products.
- The vendor meets IDC's definition for a B2B R&PO application in terms of the functionality it supports, such as price management, optimization, and execution capabilities across multiple channels (see the Market Definition section).
- The vendor has customers that IDC can interview that have been using the vendor's application for at least one year.

ADVICE FOR TECHNOLOGY BUYERS

IDC research and customer evidence make it clear that investment in a modern R&PO platform is essential for companies that expect to maintain profitability in fast-moving markets. Organizations relying on manual workflows or legacy back-office tools are now operating at a structural disadvantage. Across industries, buyers reported that having well-equipped pricing teams using advanced pricing systems that incorporate business goals with AI/ML modeling has been key to their success and profit. The competitive stakes have shifted; pricing agility, transparency, and explainable AI are the new baseline capabilities for commercial success.

When evaluating price optimization and management (PO&M) vendors, technology buyers should:

- **Prioritize explainable AI over opaque complexity:** Seek solutions that make pricing recommendations transparent, traceable, and adjustable by business users. The ability to understand why a price is recommended will be key to driving user confidence and sales adoption.
- **Validate integration and data readiness early:** Seamless connectivity with ERP, CRM, configure price quote (CPQ), and ecommerce systems is now a baseline expectation. Confirm that the vendor provides prebuilt connectors, data governance tools, and APIs to reduce implementation risk and time to value. Equally important, buyers must assess the quality and structure of their own pricing, transaction, and master data. Many R&PO platforms depend on accurate, normalized inputs to deliver optimal results, so organizations should

evaluate the current state of their data and select a platform flexible enough to meet them where they are.

- **Focus on speed to value and scalability:** Successful deployments increasingly show ROI in less than three months. Buyers on the fence should look for modular architectures that can start small (optimizing a single region or product line) and scale enterprisewide without reimplementing.
- **Assess the capacity, maturity, and influence of the pricing team:** A platform's effectiveness is a two-way street; even the most advanced platforms require a skilled pricing organization to interpret insights, set guardrails, and continuously refine pricing strategies. Ensure that internal teams or partner resources possess the staffing and analytical/business acumen needed to fully utilize the platform's capabilities.
- **Assess usability and adoption support:** The ROI varies greatly depending on the platform's adoption rate across pricing, sales, product, and finance teams. Evaluate user experience, dashboards, explainability in plain language, configurability, and the quality of enablement, training, and customer success programs.
- **Evaluate organizational change management readiness:** Pricing transformation requires a cultural shift toward data-driven decision-making. Buyers should assess how well their organization can adapt existing approval processes, incentive structures, and governance models to leverage new automation and analytics capabilities and insights.
- **Balance innovation with stability:** The best platforms pair advanced capabilities, such as agentic AI and natural language interaction, with proven governance, auditability, and human-in-the-loop oversight.
- **Look for evidence of industry-specific expertise:** Vendors with verticalized templates, elasticity models, and best practice workflows will accelerate adoption and improve accuracy in pricing decisions.

Ultimately, IDC advises technology buyers to approach R&PO investment as a core pillar of their commercial transformation strategy, not as a standalone pricing tool. The goal is not only to set better prices but to embed intelligence across quoting, rebate, and revenue processes that together drive profitable growth. The most successful organizations are those that confidently deploy R&PO platforms equipped to orchestrate analytics, automation, and strategic data usage across every sales channel, enabling rapid adaptation to customer, competitor, and market changes. Delaying investment in scalable, integrated, and intelligent pricing automation may limit opportunities, reduce agility, and affect returns.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations that determine a vendor's position in the IDC MarketScape. While IDC evaluated every vendor against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and opportunities.

Model N

IDC positioned Model N in the Major Players category in this 2025–2026 IDC MarketScape for worldwide B2B revenue and profit optimization platforms.

Model N is a privately held revenue management and profit optimization software company, which Vista Equity Partners acquired in 2024, that focuses on highly regulated, complex industries, such as life sciences and high-tech manufacturing. The Model N Revenue Cloud platform integrates pricing, contracting, incentives, tenders, channel management, and compliance into a unified cloud solution. It designed its architecture to automate and optimize the full commercial process, reduce revenue leakage, and adapt to changing regulatory or market conditions. The system leverages an array of embedded analytics, AI and ML models, and purpose-built workflows for market access, rebate management, launch sequence optimization, and global price governance. Enterprise deployments span 120 countries, with flexible deployment options to fit organizational scale and regulatory needs.

Key attributes of the company are as follows:

- **Industry specialization:** Pharma, medtech, semiconductors, ECM, and high-tech
- **Optimization capability:** Profit, net revenue, margin optimization, factoring COGS, rebates, trade promotions, shipping, contract and tender management, channel performance, Medicaid/340B, and launch sequence
- **Dynamic and personalized pricing:** AI/ML-driven segmentation, pricing, scenario simulation, win/loss likelihood, and recommendations at deal, region, or channel level
- **Data management:** Structured, semistructured, and partner-fed data sources via robust APIs; tools for customer master management, data quality, compliance, and analytics
- **Ecosystem integration:** Native support and certified integrations for ERP, CRM, CPQ, contract life-cycle management (CLM), and external BI/analytics platforms

Strengths

- Model N has an end-to-end focus on life sciences and high-tech markets, embedding domain-specific compliance requirements and workflow automation

into all core modules. Dedicated functionality addresses market-specific needs, such as channel data reconciliation, tender win analytics, and government pricing. The solution undergoes regular updates to support evolving regulatory frameworks globally.

- The platform employs supervised and unsupervised ML models and scenario-based optimization tools to deliver actionable guidance for pricing, margin, inventory, and risk management. What-if simulations, win rate and compliance probability analytics, and optimization levers (goal seek, margin, volume, and revenue targets) support commercial teams in navigating highly complex negotiation, launch, and promotion environments.
- Model N's Revenue Cloud supports the full gross-to-net workflow, consolidating pricing, contract, incentive, rebate, and tender management into a single, auditable platform. This unified data model ensures compliance, margin recovery, and centralized price execution across international geographies, business units, and channels. Model N built the system for scale, handling billions in rebates and high-volume pricing/revenue events annually.

Challenges

- Implementation in global, highly customized settings often requires configuration effort, integration with surrounding systems, and data migration, leading to extended project cycles. Organizations with unique or non-standard commercial models may experience a steeper path to full go-live and ROI.
- Because Model N has tuned its platform for large, regulated, multinational enterprises, it can be oversized for basic-need organizations or those in sectors outside of core target markets. Industry-agnostic customers may need greater customization or find the learning curve and time to value longer than with point solutions.
- Due to the system's depth, breadth, and regulatory orientation, successful adoption often requires end-user training and ongoing change management, especially for functions new to advanced price optimization or automated compliance environments. This adds to the initial investment and time to complete rollout.

Consider Model N When

Consider Model N if the buying organization needs a comprehensive, industry-specialized solution capable of unifying revenue optimization, price governance, rebates, tenders, and compliance management at a global scale. The platform is relevant for enterprises in life sciences or high-tech sectors facing complex regulatory, channel, or pricing landscapes and requiring global consistency, auditability, and AI/ML-driven optimization across the commercial life cycle.

Periscope by McKinsey

IDC positioned Periscope by McKinsey in the Leaders category in this 2025–2026 IDC MarketScape for worldwide B2B revenue and profit optimization platforms.

Periscope operates as part of McKinsey & Company and focuses on enterprise B2B pricing and growth use cases, combining software modules, advanced analytics libraries, and implementation/change management services for sustained adoption and outcomes across industries such as manufacturing, distribution, technology, and equipment makers. It is a modular B2B revenue and profit optimization platform covering price setting, price execution, and performance management with configurable analytics, guardrails, and workflows across ERP/CRM/CPQ landscapes, delivered via SaaS, private cloud, or client-hosted deployments with human-in-the-loop AI and agentic capabilities for pricing tasks and seller guidance. The product line has been in the market since 2007 and includes modules such as Price Advisor, Deal Advisor, Discount Manager, Market Vision, Relationship Manager, and Performance Monitor, with options to embed analytics into third-party systems, such as Salesforce, or to deploy a full solution as a service on Azure or in client environments.

Key attributes of the company are as follows:

- **Industry specialization:** B2B focus across manufacturing, distribution, technology, and equipment, addressing complex catalogs and negotiated pricing
- **Optimization capability:** Multidriver price optimization for margin, profit, and revenue, with architecture and guardrails
- **Dynamic and personalized pricing:** ML-driven deal scoring and seller guidance, supporting real-time and human-in-the-loop pricing flows
- **Data management:** Data lake foundation with automated cleansing, GenAI attribute extraction, and robust APIs for varied data sources
- **Ecosystem integration:** Native connections to ERP, CPQ, CRM, and BI tools, with deployment flexibility to suit IT requirements

Strengths

- Periscope provides analytics software, configurable models, and implementation/change management under one operating model, allowing joint responsibility for data quality, tailored configuration, and ongoing capability building. Reinforcing this alignment are options to embed analytics in client or third-party tools and operate in the client's cloud for IT fit and cost control.
- The platform supports a variety of client preferences, including SaaS, on-premises, private cloud, and hybrid environments, with deep integrations into enterprise systems, such as Salesforce, SAP, Microsoft Dynamics, and CPQ

applications. This architectural flexibility enables Periscope to meet complex and evolving IT requirements, including cost containment around cloud usage and deployment within existing client infrastructures.

- Periscope offers advanced pricing workbenches with explainability and guardrails. Price Advisor and Relationship Manager implement price architecture and driver-follower gaps with ML detection, real-time recalculation across related items, configurable guardrails/alerts, and scenario/what-if forecasting. Deal Advisor surfaces dynamic guidance, scores, and approval workflows, with agentic explanations to strengthen seller conviction.

Challenges

- **Real-time external data streaming:** While it is possible to integrate Market Vision and third-party data sets and use them to inform pricing, it offers limited native support for ingesting general event/IoT/weather feeds in real time for autonomous price updates, which places more emphasis on human-in-the-loop workflows for dynamic use cases today.
- **Off-the-shelf templates and community:** The configuration-first approach reduces reliance on standardized templates and public user communities, which may increase the need for guided setup and direct vendor engagement during the onboarding and evolution of models.
- **Implementation partner ecosystem:** Typically, Periscope/McKinsey teams deliver implementations rather than a broad SI channel, which can constrain customers seeking to leverage incumbent systems integrators for program delivery and change management.

Consider Periscope by McKinsey When

Consider Periscope when an enterprise requires end-to-end pricing transformation with configurable analytics, embedded guardrails and governance, seller-facing guidance in CPQ, and an implementation model that can run in SaaS or client-hosted environments with strong change management and consulting support. It is also suitable for organizations seeking ML-assisted price architecture, competitive intelligence integration, and agentic task orchestration with human-in-the-loop control.

Pricefx

IDC positioned Pricefx in the Leaders category in this 2025–2026 IDC MarketScape for worldwide B2B revenue and profit optimization platforms.

Pricefx is a privately held, venture-funded company founded in 2011 with headquarters in Germany, a European headquarters in Prague, and a U.S. headquarters in Chicago. The platform is cloud-native and in a position to deliver end-to-end price management

across insight generation, simulation and optimization, price setting, and execution. Its solution suite is modular and spans the complete price management and CPQ life cycle, integrating strategy, controlling, dynamic setting, and margin realization. The company supports midsize to multinational enterprises with advanced, AI-enabled, and modular capabilities for managing and optimizing pricing, rebates, promotions, agreements, channel management, quoting, and sales compensation. Pricefx operates worldwide through direct operations and a substantial partner network. Industry accelerators and best practice templates expedite deployment and enhance time to value.

Key attributes of the company are as follows:

- **Industry specialization:** Prepackaged industry use cases and process enablement tools that target manufacturing, distribution, automotive, high-tech, EO&G, chemicals, and related sectors
- **Optimization capability:** Productized AI and agent models that optimize list prices, price waterfalls, and negotiation, and support custom analytics via "bring your own science"
- **Dynamic and personalized pricing:** Real-time pricing, negotiation guidance, and embedded insights that it delivers through agents that learn and adapt over time
- **Data management:** Platform Manager offers self-service for integrations, data administration, and release scheduling, with recent updates adding enhanced import/export functions and external data cloud connections
- **Ecosystem integration:** Broad connectivity, with CRM, CPQ, ERP, and SFDC partnerships, and also with SAP as a SAP-endorsed app with premium certification, SAP-certified for integration with SAP S/4HANA, and SAP-certified for BTP

Strengths

- Pricefx has invested heavily in productized, explainable AI and agent-based automation, embedding over 125 proprietary pricing agents within its platform. These automate high-value pricing tasks, ranging from margin leakage detection and discount compliance to segment-specific optimization and inventory clearance. These agents support multi-objective optimization, leveraging both AI/ML- and rules-driven decisioning for granular, actionable recommendations, all designed for transparency and auditability.
- The platform's cloud-native, API-first architecture facilitates seamless bidirectional integration with enterprise systems. Open data models, robust RESTful APIs, and event-driven integrations enable the ingestion, processing, and application of internal and external data, including third-party market feeds, ERP, CRM, and digital commerce sources. Pricefx supports high-volume, real-time

analytics and a wide array of pricing models (attribute, formula, volume, margin-seeking, goal-seeking, leader-follower, and custom), as well as mass price updates, inventory-aware pricing, and personalized ecommerce pricing.

- Pricefx emphasizes implementation speed and customer autonomy. Its accelerators, out-of-the-box industry use cases, and guided onboarding reduce deployment cycles, with customers able to launch pricing agents in days and achieve value realization within six to nine months. One customer commented that during the vendor demo, they asked Pricefx to add an attribute to the pricing logic, which the team was able to configure live in 10 minutes.

Challenges

- Pricefx requires ongoing updates to ensure sustained optimal performance and alignment with evolving business strategies. The company has two regular innovation releases per year with an "N-1" support policy that requires customers to upgrade to the current or last full release version to keep up with the latest advancements. This represents an additional commitment for internal IT and business teams, though Pricefx does provide support and best practices to streamline these processes.
- Pricefx's effectiveness is closely linked to the quality and completeness of the input data used for analytics and pricing recommendations. Pricefx does not provide native data-cleaning tools; instead, it partners with third-party providers and leverages AI technologies to support customers in maintaining robust data-driven processes. Strong data governance and hygiene remain the responsibility of the client organization.
- Integration depth can drive timelines and risk despite low-code/no-code options. Pricefx positions broad connectivity to CRM/CPQ/ERP and highlights low-code/no-code integrations. However, embedding pricing insights/actions into quoting, agreements, and rebates at enterprise scale often depends on the complexity of incumbent systems and data readiness. The materials underscore integration breadth but do not fully detail contingencies for highly customized ERP landscapes, which can affect schedules and change management.

Consider Pricefx When

Consider Pricefx when rapid time to value, scalability, and configurability are top priorities and enterprises want to operationalize AI-driven pricing quickly through packaged, industry-specific use cases and a large library of prebuilt agents that embed directly into CPQ, agreements, rebates, and price-setting workflows, supported by a self-service platform layer for integrations and data administration.

Profitmind

IDC positioned Profitmind in the Major Players category in this 2025–2026 IDC MarketScape for worldwide B2B revenue and profit optimization platforms.

Profitmind is a privately held SaaS revenue and profit optimization platform with headquarters in Pittsburgh, Pennsylvania, and Palo Alto, California. It started as Netail and was incubated by AI Fund, then launched as an independent company in 2022. Profitmind tailors its offerings for B2B brands, wholesalers, and DTC retailers, with a particular strength in the retail and distribution industries. The platform is the first natively AI solution for retail, orchestrating a suite of collaborative AI agents to optimize pricing, revenue, margin, and inventory decisions. Profitmind targets mid- to large-sized organizations with substantial transaction volumes and complexity, focusing on organizations seeking to automate, analyze, and optimize pricing and commercial outcomes through advanced analytics and AI-driven automation.

Key attributes of the company are as follows:

- **Industry specialization:** Specializes in retail, wholesale, and direct-to-consumer brands, with industry templates and automation agents enabling rapid deployment
- **Optimization capability:** Utilizes AI agents to optimize pricing, assortment, and negotiation, offering business-ready recommendations and scenario analysis
- **Dynamic pricing:** Supports real-time, personalized pricing and responds to competitor moves and inventory shifts with adaptive agent workflows
- **Data management:** Automates data onboarding and preparation, with robust real-time and batch integrations across ERP, CRM, and ecommerce systems, and a road map for further self-service tools
- **Ecosystem integration:** Provides prebuilt and API-based integrations, with ongoing expansion of low-code/no-code and external data connectivity

Strengths

- The platform's vision is rooted in cofounder Andrew Ng's work because he coined the term "agentic AI," and the solution has a native agentic AI architecture, where specialized, collaborative AI agents autonomously analyze data, model scenarios, and recommend or execute actions across price, inventory, and assortment domains. This multi-agent system enables rapid synthesis of complex business factors and supports a level of workflow automation and strategy alignment not typically seen in single-model or rules-driven platforms.

- The platform offers quick deployment and time to measurable value. Automated onboarding agents perform data extraction, validation, and transformation, enabling most customers to achieve full rollouts in six weeks or less and realize meaningful ROI often within the first month of use. Enhancing this are proprietary methods for making disparate data "AI-ready," a capability being productized for standalone use.
- Profitmind is designed for adoption by business teams in retail, finance, sales, and operations with minimal training (typically under two hours). All recommendations are in business language and contextualized with financial, operational, and strategic rationales enabling nontechnical stakeholders to adopt advanced analytics at scale. The system supports human-in-the-loop feedback, reinforcement learning, and scenario simulation, further empowering business teams.

Challenges

- As a relatively new entrant, Profitmind has a developing installed customer base and global support footprint. While early adoption results demonstrate strong ROI and customer advocacy, the scalability of its reputation, long-term track record, and support operations will undergo monitoring as the company grows.
- The initial focus of Profitmind has been primarily within retail and distribution, with B2B brands and wholesalers as the core clientele. As such, it may not yet address deep requirements or compliance obligations in industries such as manufacturing, financial services, and healthcare, or sectors with highly bespoke contracting, billing, or revenue recognition workflows.
- While core integrations with ERP, CRM, and commerce platforms are available, some advanced revenue life-cycle features (such as contract management, billing, complex channel/rebate management) are not natively present. Deep integrations with third-party analytics, low-code integration tools, or all enterprise security/compliance certifications may also not be as developed as in platforms that larger, legacy vendors own.

Consider Profitmind When

Consider Profitmind for organizations seeking rapid time to value with AI-driven revenue and profit optimization, especially those in retail, wholesale, and B2B distribution environments who require automated, segmented, and competitive pricing at scale. Its platform is a good fit for buyers with complex, high-volume data, a need for business-user adoption, limited data science and pricing team resources, and a strategic focus on operationalizing advanced analytics quickly.

PROS

IDC positioned PROS in the Leaders category in this 2025–2026 IDC MarketScape for worldwide B2B revenue and profit optimization platforms.

PROS Holdings Inc. is a publicly traded company (NYSE: PROS) with headquarters in Houston, Texas. It has entered a definitive agreement for Thoma Bravo to acquire it (subject to approvals), with the intent to merge PROS' B2B software business, which includes capabilities in price optimization, CPQ, and rebate management, with Conga, its portfolio company, focusing on CPQ, CLM, and document automation. The company's core offering, PROS Smart Price Optimization and Management, is part of an integrated commercial platform that delivers AI-driven pricing and revenue optimization solutions at enterprise scale. PROS leverages decades of expertise in pricing science, AI, and ML, embedding these technologies across a broad array of industries and global markets. Its platform supports complex pricing, rebate management, subscription, and CPQ capabilities, aiming to optimize revenue and profit across all sales channels in real time.

Key attributes of the company are as follows:

- **Industry specialization:** B2B sectors, including manufacturing, distribution, cargo (air freight, rail, etc.), and services, with expertise in logistics capacity-aware pricing and distributor price guidance
- **Optimization capability:** AI-optimization, negotiated and ecommerce pricing using neural networks, multiple prescriptive algorithms with elasticity, win-rate modeling, price waterfalls, and policy-compliant approval workflows
- **Dynamic pricing:** Real-time pricing engine that delivers dynamic, contextual pricing within milliseconds, leveraging neural networks for transaction-level guidance and agentic AI for anomaly detection
- **Data management:** Streamlines onboarding, monitoring, access control, and normalization, with support for enterprise connectors and catalog management
- **Ecosystem integration:** Certified connectors and APIs for major ERP/CRM and ecommerce platforms, serving both back-office and digital commerce apps

Strengths

- PROS offers a single unified platform that encompasses pricing, rebate management, CPQ, and subscription management. This horizontally integrated approach allows customers to manage the entire commercial life cycle, from pricing strategy and execution to rebate and contract management, without needing disparate systems or complex integrations. This breadth facilitates consistent pricing execution and synchronized workflows across teams.

- PROS employs neural networks and sophisticated AI models for price optimization, moving beyond traditional segmentation methods to enable transaction-specific pricing. Its platform incorporates AI not just for pricing but across all commercial workflows, including rebates and recommendations. PROS has also embedded generative AI and is advancing agentic AI workflows that autonomously optimize pricing decisions with transparency and explainability.
- The PROS real-time pricing engine delivers pricing recommendations with contractually guaranteed sub-300 millisecond response times, with support from enterprise-grade SLAs ensuring 99.99% uptime. This capability is critical for high-volume use cases, such as ecommerce and global digital commerce environments that demand instantaneous, accurate pricing. PROS also supports extensive data integration and scalability requirements, processing trillions of transactions annually worldwide.

Challenges

- PROS can present a significant learning curve for organizations with less mature pricing processes or limited in-house analytic expertise. Effective leverage of the platform's capabilities often requires a substantial enablement effort, including ongoing user training and change management to ensure full adoption and maximize value. Organizations without established data stewardship, cross-functional governance, and executive sponsorship may find the breadth adds planning and rollout complexity.
- Implementation of PROS may require considerable upfront investment in data preparation, integration with legacy ERP and CRM systems, and process alignment. Organizations with fragmented or lower-quality data might experience delayed time to value because the platform's AI models rely heavily on consistent, high-integrity data inputs for accurate price and profit optimization.
- Connector specificity and external data strategy still merit diligence, though there are certified integrations and several strategic endpoints, with additional connectors and external data sets on the road map. Buyers with heterogeneous ERP estates, specialized ecommerce stacks, or requirements for third-party data (e.g., indices, weather, and competitor signals) should confirm connector availability, data contracts, and performance profiles at the outset to avoid custom work that could impact time to value.

Consider PROS When

Consider PROS when you require real-time, explainable price optimization at enterprise scale (spanning negotiated sales and digital self-service) and you want pricing to operate as part of a unified commercial platform that also covers CPQ, rebates, and

subscriptions. This fit is key for organizations seeking to modernize the full offer-to-price-to-order life cycle with audited performance characteristics, agent-assisted analytics, and governance suited to global B2B operations.

Simon-Kucher

IDC positioned Simon-Kucher in the Leaders category in this 2025–2026 IDC MarketScape for worldwide B2B revenue and profit optimization platforms.

Simon-Kucher is a global consultancy specializing in revenue and profit optimization through the integration of commercial strategy, advanced analytics, and technology. Founded in 1985 and headquartered in Bonn, Germany, Simon-Kucher is a privately owned partnership, owned by more than 200 partners who are also entrepreneurs in the company. The company's software arm, Simon-Kucher Engine, delivers proprietary platforms, including the core SK Pricer solution for price optimization and management across B2B and B2C environments. Simon-Kucher's approach tightly aligns strategic consulting, technology deployment, and ongoing support to enable sustainable, measurable growth for its clients.

Key attributes of the company are as follows:

- **Industry specialization:** B2B sectors, including healthcare, life sciences, industrials, technology, financial services, media, and telecom
- **Optimization capability:** Value-based methods with configurable algorithms, price waterfalls, simulations, price corridors/targets, and seller guidance
- **Dynamic pricing:** SK Dynamica, which provides AI-based dynamic price optimization with real-time automation (e.g., SmartRates), and SK Pricer, which augments personalization at the account/opportunity level via insight agents
- **Data management:** Custom ETL and flexible data integration that allow real-time, batch, and streaming dataflows with automated validation and transformation supporting structured and unstructured data with configurable pipelines
- **Ecosystem integration:** SK Engine, which positions its apps to coexist with CRM/CPQ rather than displace them and delivers its vertical apps as cloud software that integrates with customers' systems of record

Strengths

- Simon-Kucher combines its commercial strategy expertise with configurable, client-tailored software made for pricing and sales teams. The SK Pricer platform operationalizes pricing strategy directly within the application. This close linkage between strategy and software accelerates implementation timelines and helps organizations shorten time to value and reduce change management barriers.

- SK Pricer places significant emphasis on its configurable, visually driven interface and workflow design. Users benefit from low-code and drag-and-drop tools for configuring pricing logic, creating simulations, and managing discount conditions without reliance on IT. Flexibility exists within almost every aspect of the platform, from changing the margin calculation to changing the base on the price waterfall from product costs to an anchor product price, competitor price, or even multiple products.
- The platform employs AI and advanced analytics to surface actionable insights (via insight agents) that recommend pricing actions, highlight value drivers, and assist with segmentation. All AI recommendations offer transparency so users can drill into the logic, see comparable deals, review the data behind suggestions, and override automated outputs as needed. The company tailors custom AI models (e.g., elasticity estimation and win-loss propensity) for each client, and agentic AI features support autonomous scenario building within business constraints.

Challenges

- While feature-rich in price setting, governance, and simulation, SK Pricer's functional scope in adjacent areas (such as rebate management, contract life-cycle management, and comprehensive channel incentives) lags more mature, one-stop platforms. Current road maps identify these modules as priorities for future investment, but depth of out-of-the-box capabilities is presently limited, and specialized needs may require custom development.
- SK Pricer may not offer the same historical depth of integrations, third-party ecosystem relationships, or community content as longer-established software vendors. While the underlying technology is scalable and extensible, some connectors (such as ecommerce) have partial support or are on the short-term road map. Customers with highly heterogeneous architectures or a preference for prebuilt integrations may face steeper effort in onboarding.
- Simon-Kucher does not maintain ISV or SI partnerships, opting instead for direct sales and internal implementation resources, and the platform does not offer proprietary competitive intelligence or automated price scraping capabilities out of the box, limiting coverage for organizations seeking partner-driven delivery and advanced external market insights.

Consider Simon-Kucher When

Consider Simon-Kucher for organizations that value the direct link between strategic advisory, advanced analytics, and highly tailored software delivery. Enterprises with complex or evolving pricing strategies and pricing and sales teams who require strong explainability and hands-on implementation in addition to robust AI and simulation

capabilities will benefit most from this integrated offering. The platform is particularly attractive where bespoke transformation, deep industry expertise, or alignment to a global consulting partner is a key selection criterion.

SPOSEA

IDC positioned SPOSEA in the Major Players category in this 2025–2026 IDC MarketScape for worldwide B2B revenue and profit optimization platforms.

SPOSEA BV is a privately held, self-funded company with headquarters in Hoofddorp, Netherlands, and began operations in 2015. The company's flagship product, the BrightPrice Suite, serves medium-to-large B2B enterprises, purpose-built for organizations running SAP ERP that face complex pricing challenges. The solution comprises Foundation, Build, Deal, Rebate, and Insights modules, offering comprehensive support across the pricing life cycle, price management, optimization, deal management/CPQ, analytics, and rebate management. The platform emphasizes native, real-time integration with SAP's Sales and Distribution module and supports seamless bidirectional connectivity with mainstream CRM systems.

Key attributes of the company are as follows:

- **Industry specialization:** SAP-driven sectors, such as chemicals, manufacturing, energy, and materials, with close alignment to SAP's cloud and S/4 rollouts
- **Optimization capability:** Enables global price list management, value-based pricing, guardrails, and what-if simulations; embeds recommendations and updates directly using SAP-native pricing logic
- **Dynamic pricing:** Offers microsegmented pricing and high-frequency recalibration, with transaction-level guidance, incorporating factors such as costs and transaction patterns and enforcing approval governance
- **Data management:** Consolidates SAP data and external sources in a central repository on SAP BTP/HANA, supports data science, and delivers analytics via SAP Analytics Cloud, Power BI, or Tableau
- **Ecosystem integration:** Provides native integration to SAP ERP (ECC and S/4HANA), major CRM, and ecommerce platforms, fully leveraging SAP's pricing engine and BTP services for advanced, AI-powered use cases

Strengths

- SPOSEA engineered BrightPrice for tight, native integration with SAP ERP (both ECC and S/4HANA), utilizing direct data synchronization instead of API or ETL-based approaches, rather than re-implementing a parallel engine. This architecture ensures real-time access to SAP transactional and master data, minimizes duplication, and allows pricing, quoting, and rebate management to

leverage all data structures and logic in SAP without heavy custom integration or additional middleware.

- The BrightPrice Suite consists of distinct modules that focus on the core revenue management life cycle, each with configurable workflows, approval hierarchies, and role-based access. Customers can start with BrightPrice Foundation and scale up as pricing sophistication grows. The user interface is both SAP UI5-based and web-based, which allows for adaptability to client workflows and personalization.
- SPOSEA's solution prioritizes data harmonization and governance, embedding a unified pricing repository that brings together SAP data with internal and external sources for advanced scenario simulation and optimization. Their approach includes predictive analytics and ML (segmentation, elasticity modeling, and price recommendation) coupled with what-if analysis and scenario testing. The platform architecture supports a practical, non-black-box approach, where explanations for recommendations surface visually.

Challenges

- While SPOSEA's deep SAP expertise enables a highly differentiated offering for SAP ERP organizations, it diminishes applicability for clients not using SAP as their core system of record. The company's focus (by design) makes the solution suboptimal for non-SAP environments and may limit business development beyond this ecosystem.
- BrightPrice's effectiveness depends on clean, well-structured, and harmonized data within the client organization. Organizations in an early stage of pricing maturity or those with fragmented, legacy, or Excel-driven pricing processes must invest in data readiness, migration, and change management to realize full value from the solution.
- Some advanced features (such as agentic AI, fully autonomous pricing strategies, and unstructured data ingestion) are in development or early-stage rollout based on the product road map and market readiness.

Consider SPOSEA When

Consider SPOSEA when seeking a cost-effective, scalable, and rapidly implementable revenue and profit optimization solution that natively integrates with SAP ERP. The platform is particularly well-suited for global B2B enterprises that have complex pricing, quoting, and rebate needs and are prioritizing SAP-centric digital transformation or migration to S/4HANA. SPOSEA is especially attractive for those committed to harmonizing processes, reducing Excel dependency, and adopting robust governance, analytics, and AI-driven pricing strategies in an SAP-first environment.

Synchron

IDC positioned Synchron in the Major Players category in this 2025–2026 IDC MarketScape for worldwide B2B revenue and profit optimization platforms.

Synchron is a privately held global provider of cloud-based after-sales service solutions, with a pronounced focus on revenue and profit optimization for manufacturers and service organizations operating in asset-intensive industries. Founded in 1999 and headquartered in Stockholm, Sweden, Synchron's offerings cover service parts inventory, price optimization, warranty, and field service management. The company's strategy centers on digital transformation of the service supply chain, leveraging AI and advanced analytics to maximize customer uptime, optimize parts availability, and enhance service profitability. Synchron primarily targets large enterprises in industries such as automotive, industrial equipment, agriculture, construction, aerospace, and defense, where service and parts operations are an essential revenue and profit source. The platform supports complex global operations and manages the intricacies of dealer networks and multitier distribution.

Key attributes of the company are as follows:

- **Industry specialization:** Focuses on capital assets with extended life cycles, serving dealer and distributor-heavy sectors, such as automotive, industrial equipment, agriculture, construction, aerospace, consumer durables, high-tech, and medical devices
- **Optimization capability:** Combines advanced price optimization and segmentation with a waterfall framework for contract pricing, emphasizing cost prediction and transparent margin sustainability
- **Dynamic pricing:** Applies AI/ML for customer segmentation and elasticity modeling, tailoring pricing to aftermarket contexts where manufacturers or service organizations control pricing
- **Data management:** Utilizes a unified data layer to aggregate and harmonize siloed data, enabling cross-silo analytics and centralized decision-making
- **Ecosystem integration:** Connects pricing, inventory, and service management in a coordinated approach, streamlining data and workflows and accelerating business decisions

Strengths

- **Deep aftermarket and service industry expertise:** Synchron has developed highly specialized capabilities for the pricing of service and after-sales parts within complex, asset-driven industries, differentiating it from more generalized price optimization vendors. This industry focus allows the solution to address

sector-specific challenges, such as disparate dealer networks, the gray market, and outcome-based service models.

- **A unified service life-cycle management platform:** The company's integration of inventory, service, and pricing solutions creates tangible cross-functional value. This approach encourages customers to move beyond point pricing solutions to orchestrated, data-driven service and profit management, increasing automation and resilience.
- **Advanced ML-driven segmentation and transparency:** Synchron's pricing models leverage ML for customer and product segmentation that aligns to both global and local conditions. Decision support and visualization tools enhance business transparency, and the platform supports explainability and governance features necessary for compliance in highly regulated environments.

Challenges

- **Narrower applicability outside aftermarket contexts:** Synchron explicitly optimized its platform for spare parts and service contracts. Organizations seeking enterprisewide, finished-goods pricing led by marketing (e.g., new product launches and retail/ecommerce price competition) may find the fit less direct relative to use cases where the manufacturer/service organization governs pricing.
- **Implementation timelines vary and can be lengthy:** Deployment scope depends on data maturity, multiregion coverage, and process complexity. Vendor discussions indicate durations ranging from a few months to more than a year, and two-year programs are "not uncommon" for large, complex environments. This should factor into business case and sequencing.
- **Data unification is a prerequisite for value:** Synchron's approach presumes aggregation of siloed data into a single source of truth to enable cross-silo analytics and optimization. Where data quality, model governance, or integration capacity constraints exist, initial time to value may suffer delays while the shared data layer and decision frameworks are established.

Consider Synchron When

Consider Synchron when aftermarket revenue is a strategic growth and margin engine and you need to optimize spare parts and service contract profitability in tandem with parts availability and service execution. Synchron's combination of advanced pricing/contract pricing, shared data layer, and operational integration suits OEMs and distributors with complex dealer networks, multiregion footprints, and a mandate to harden margin stability while coordinating pricing with inventory and service KPIs across the installed base.

Vendavo

IDC positioned Vendavo in the Leaders category in this 2025–2026 IDC MarketScape for worldwide B2B revenue and profit optimization platforms.

Vendavo is a privately held provider that helps B2B manufacturers and distributors maximize profitable growth. The company operates globally, with headquarters in Denver, Colorado, and regional support hubs in Europe, India, and North America. Francisco Partners and Accel-KKR, two technology-focused private equity firms, jointly own Vendavo. Its solution architecture is cloud based, API first, and harmonized across a common data model, facilitating robust integration with ERPs, CRMs, and other enterprise systems. Vendavo positions its suite as a "commercial operating system" spanning price management and optimization, CPQ, and rebate/channel management, with embedded analytics and agentic AI. The portfolio centers on Vendavo Pricepoint (systematic global-to-net price setting), Intelligent CPQ (guided configuration and agreement management), and Rebate and Channel Manager, all built on a common platform and data model.

Key attributes of the company are as follows:

- **Industry specialization:** manufacturers and distributors
- **Optimization capability:** Deal Price Optimizer, which applies WTP/elasticity and policy-based models for price guidance; Margin Bridge Analyzer, which quantifies pricing and PVM drivers; and a model library that includes segment, power/risk, and volume-curve optimization to align targets with strategy
- **Dynamic pricing:** AI Price Manager, AI Price Optimizer, and AI Deal Desk, which introduce natural-language copilots in the flow of work to surface contextual guidance and approvals; guidance that integrates into quoting and agreement workflows
- **Data management:** A common data model with sync/async APIs, GraphQL interfaces, and an operability framework with a cloud-native, API-first platform
- **Ecosystem integration:** Standardized integrations with SAP, Oracle (ERP), Salesforce, and Microsoft Dynamics (CRM)

Strengths

- Vendavo's pricing solution leverages explainable AI along with embedded ML models to deliver pricing guidance, margin optimization, and customer segmentation at scale. The solution emphasizes model transparency ("glass box" rather than "black box"), empowering pricing teams with visibility and control over algorithmic recommendations and ensuring auditability.

- Vendavo's Commercial Operating System unifies price setting, quoting, rebate management, and analytics across the entire price waterfall in a single platform. This integration, reinforced by an API-first architecture and harmonized data model, delivers a "single pane of glass" for price management, enabling cross-functional execution, process automation, and seamless data orchestration between pricing, sales, and finance.
- Preconfigured with vertical-specific workflows, pricing playbooks, and best practices, the platform caters to the nuanced needs of manufacturing-centric industries. Industry accelerators and embedded KPI libraries enable rapid time to value and tailored adoption, particularly for segments such as medtech, building products, and automotive.

Challenges

- Vendavo has optimized its price management and optimization solutions for enterprise manufacturers and distributors in made-to-stock business models. As a result, companies with made-to-order goods or with core requirements in industries outside of this may find certain limitations in functionality. Vendavo has released a made-to-order API to price products not directly stored in Pricepoint to account for these use cases.
- Vendavo Pricepoint's UI, while highly functional, can feel less modern. Some users mentioned that the UX prioritizes depth and configurability over visual polish, which may require additional onboarding for broader stakeholder adoption. That said, recent enhancements have started to improve usability and the overall user experience.
- Customer feedback reveals small variability in the integration and API experience. Customers noted that API integration for Vendavo presents certain challenges, while other functionality received positive feedback. This indicates that although customers generally expressed satisfaction with the platform overall, integration and interoperability may require additional technical effort and oversight.

Consider Vendavo When

Consider Vendavo for mid-to-large B2B manufacturers and distributors, particularly those that face high product and channel complexity, demand rigorous price and rebate governance, and seek a unified platform to optimize their price, quote, and incentive operations. Organizations looking for scalable, transparent AI-driven heuristics with industry-specific accelerators, deep ERP/CRM integration capabilities, and a strong balance of automation with user oversight will find Vendavo's offering well suited to their strategic revenue and profit optimization needs.

Vistaar

IDC positioned Vistaar in the Leaders category in this 2025–2026 IDC MarketScape for worldwide B2B revenue and profit optimization platforms.

Vistaar Technologies, founded in 2001 and headquartered in Parsippany, New Jersey, is a private software provider specializing in price optimization and management, CPQ, rebate management, and promotion management. In B2B revenue and profit optimization, the company's primary product is the Vistaar SmartPricing Suite, first released in 2006, a SaaS platform designed for enterprise-level price management and optimization, spanning the full life cycle from pricing strategy and list management through to execution and analysis.

Key attributes of the company are as follows:

- **Industry specialization:** Manufacturing, consumer goods, and specialty verticals, such as beverage alcohol, steel, retail pharmacy, retail convenience stores, homebuilding, music, and cannabis
- **Optimization capability:** User-controlled and auto price optimization capabilities through the Vistaar SmartOptimizer bolt-on; AI/ML-driven optimization with prioritized opportunities and explainable price recommendations within a price modeling workbench, allowing rule changes, simulations, and goal tracking
- **Dynamic pricing:** Provides capabilities for using optimized prices or pricing rules, heat maps, configurable alerts, competitive analyses, and context-aware, explainable analytics to address value leakage and guide pricing strategy
- **Data management:** Ingests data from ERP, CRM, and external sources; supports configuration at scale through rule frameworks, a formula editor, and reusable platform components
- **Ecosystem integration:** Connects with ERP and CRM systems, aggregates data from partners, and enables multimodule deployments (pricing, promotions, rebates, and CPQ) within a unified interface

Strengths

- **Platform-first architecture with reusable components and vertical templates:** Vistaar's generic planning framework enables rapid configuration of solutions that support diverse business processes across industries. It leverages modular assembly toolkits that allow modeling of various planning functions, including price management, quoting, rebates, and more. This supports rapid configuration, reuse of templates across industries, and cost-effective extension when requirements are unique.

- **Ease of use:** Vistaar designed its platform for simplicity and intuitive navigation, enabling users to quickly explore data through opportunity heat maps, dynamic alerts, and easy slice-and-dice capabilities. Built-in contextual, actionable analytics and self-serve tools guide users to insights without a complex setup, driving faster adoption and measurable improvements in decision-making, speed, and ROI.
- **End-to-end visibility:** Vistaar offers breadth across price, promotions, rebates, and quoting under a single UI. When licensed together, pricing, promo, rebates, and CPQ live within one interface and data context, supporting coordinated decisions across the price waterfall. This alignment is useful for organizations that measure outcomes holistically and seek to connect price setting, quoting, and incentive programs.

Challenges

- Vistaar deployments require up-front integration with customer ERP, CRM, and BI systems, which can entail significant internal IT resource commitments and a onetime effort for system harmonization. Vistaar recommends defining a clear integration road map and establishing a dedicated core team to oversee data integration activities.
- In cases where organizations have heavily invested in externally managed CRM systems, there may be split pricing workflows between the CRM and Vistaar environments. This can result in additional end-to-end testing complexity and prolonged user adoption cycles, especially if pricing intelligence and execution reside in separate systems. Vistaar has bolt-on offerings to navigate this.
- The effectiveness of the Vistaar platform is heavily reliant on the quality and completeness of customer data. Challenges such as incomplete win-loss records or inconsistent master data can reduce model accuracy and delay value realization, thus requiring remediation and instrumentation. Vistaar recommends proper phasing and data-readiness planning, collaboratively defined as part of its standard onboarding cycle.

Consider Vendor When

Consider Vistaar when you want to digitize your revenue management processes through a configurable platform that unifies pricing, quoting, promotions, and rebates within a closed-loop, analytics-driven framework. Even in cases where standard data integration options with ERP/CRM are limited, Vistaar's configurable architecture allows flexible implementation options. Template-based onboarding, tailored for both cross-industry and industry-specific use cases, enables faster deployment across supplier and distributor ecosystems in manufacturing, consumer goods, retail, and other emerging industries.

Vistex

IDC positioned Vistex in the Major Players category in this 2025–2026 IDC MarketScape for worldwide B2B revenue and profit optimization platforms.

Vistex is a privately held enterprise software provider founded in 1999 and headquartered in Hoffman Estates, Illinois. The company offers comprehensive solutions for pricing, incentive, rebate, royalty, and channel program management, serving clients in a wide range of industries globally. Known initially as a rebate and chargeback solution, which then moved to pricing, Vistex's primary revenue and profit optimization offerings include the SAP Margin Optimization Solutions (for SAP environments) and the Vistex Go-to-Market Solutions suite (for any ERP platform). These solutions manage the intricate mechanics of revenue processes, providing automation and analytics for pricing, rebates, rights, royalties, and channel programs.

Key attributes of the company are as follows:

- **Industry specialization:** SAP-centric manufacturers, wholesalers, and retailers
- **Optimization capability:** Structured processes for list-price setting and negotiated sales prices with scoring/feedback, what-if price adjustments to assess margin and volume impact, and controlled commit to execution
- **Dynamic and personalized pricing:** A cloud-price staging hub that serves real-time ecommerce and field quoting; guidance can reflect competitor targets and cost conditions for contextual recommendations
- **Data management:** External competitive data ingestion, cleansing, and analytics; native access to ERP cost structures and supplier rebates to calculate true net costs before optimization
- **Ecosystem integration:** Choice of SAP-embedded deployment plus cloud services; integrations into ecommerce and Salesforce RevFlo

Strengths

- Vistex leverages an integrated approach to margin optimization, enabling clients to manage and optimize every lever affecting net revenue, including pricing, discounts, cost of goods sold, shipping, rebates, chargebacks, and trade promotions. The platform automates complex calculations, presents full transparency in gross-to-net profitability, and adapts to multi-entity, multijurisdictional compliance requirements.
- The Vistex platform architecture supports dynamic pricing and profit optimization by harnessing ML, agentic AI workflows, and generative AI. Users benefit from self-service dashboards, automated data ingestion from structured and unstructured sources, and tools for scenario modeling and simulation.

Personalized AI recommendations, explainable decision logic, and flexible integration endpoints support the solution's segmentation and price optimization capabilities.

- Vistex provides tailored functional modules and deployment templates that address specific industry requirements for sectors such as manufacturing, consumer products, life sciences, retail, and licensing. The solution handles complexity across high transaction volumes, diverse regulatory environments, and multilevel sales channels. The platform's flexibility extends to both on-premises and cloud deployments, and it can scale for organizations of any size.

Challenges

- Implementing SAP-embedded Vistex solutions can present complexity, particularly for clients new to SAP or for those with limited technical expertise. These projects require strong executive sponsorship, rigorous change management, and ongoing investment in training to drive adoption and realize the full value of the solution. To mitigate challenges, Vistex offers industry-specific templates out of the box while giving the option to configure and personalize the solution for unique or advanced needs.
- Vistex capabilities heavily depend on quality data (particularly for chargeback, rebate, and channel program management). The data management tools that Vistex solutions provide need robust organizational support and process alignment or customers may encounter resource-intensive operations and an increased risk of errors or compliance lapses.
- The cost of deploying and maintaining Vistex solutions may be prohibitive for some midsize enterprises if they need capabilities far beyond the templates it offers. Vistex solutions are flexible and can handle significant complexity, but this ability may come at a cost. If not managed, extended implementation cycles, specialized expertise, and ongoing support requirements can contribute to an increased total cost of ownership.

Consider Vistex When

Consider Vistex for organizations needing integrated management of complex revenue, pricing, and incentive programs, especially where multiple margin levers in gross-to-net drives business outcomes. Vistex's embedded solutions are particularly relevant for enterprises operating a SAP-based commercial stack that unifies price setting, real-time delivery, and incentive management by leveraging external data and ERP costs to optimize net revenue. Vistex's cloud suite offers broad functional coverage that supports SAP and non-SAP environments as well as on-premises and cloud deployments.

Zilliant

IDC positioned Zilliant in the Leaders category in this 2025–2026 IDC MarketScape for worldwide B2B revenue and profit optimization platforms.

Zilliant is a privately held software provider founded in 1999 and headquartered in Austin, Texas, with a global footprint focusing primarily on North America and Europe. In 2023, Zilliant acquired In Mind Cloud to enhance its CPQ capabilities, further strengthening its portfolio and support for complex configuration, pricing, and quoting workflows. Zilliant's precision pricing platform utilizes advanced data science to deliver dynamic pricing, quoting, and sales guidance by integrating with ERP, CRM, and ecommerce systems to maximize revenue and profit. Within the optimization domain, Zilliant's design centers on three pillars — segmentation, price sensitivity, and strategy-based optimization — to produce explainable, defensible recommendations. Its "goal seeking" optimizer works backward from the business outcome (e.g., profit, volume).

Key attributes of the company are as follows:

- **Industry specialization:** Primary focus on B2B manufacturers and distributors, with additional traction in selected services segments
- **Optimization capability:** A segmentation manager with attribute engineering, a sensitivity module that estimates price–volume response, and scenario/strategy management that constrains moves to achieve defined outcomes
- **Dynamic pricing:** Price guidance produced from the optimizer that propagates into sales agreements and quoting tools as part of a single motion
- **Data management:** Projects that include ingestion, normalization (e.g., cost based), data quality checks, and analytics (when segments lack volume, the system supports inference/borrowing from adjacent segments and provides embedded visualizations for review)
- **Ecosystem integration:** ERP/CRM/quote flows, extended into CPQ through the acquisition of In Mind Cloud to address "last mile" delivery of price.

Strengths

- Zilliant's precision pricing platform incorporates robust ML and statistical modeling to apply segmentation, elasticity, and scenario modeling to tailor prices by region, product, customer, and deal attributes. Its flexible configuration enables automated retraining and adaptive optimization based on new data and business objectives, minimizing manual intervention and aligning pricing outputs directly to profit and revenue targets.
- Zilliant has engineered its platform for tight integration with legacy and modern ERP, CRM, and ecommerce environments, allowing for real-time ingestion of

internal structured and semistructured data. Advanced integration toolsets support robust API connectivity, bidirectional data sync, and secure batch or real-time exchange, while proprietary tools enable granular drill-down and dashboard customization without dependence on IT.

- Zilliant provides actionable guidance and targeted deal recommendations directly in sales workflows. Through role-based dashboards, scenario planners, and approval workflows, the platform enables sales teams to react to pricing models, margin thresholds, and real-time alerts, maximizing revenue while minimizing leakage. Analytics modules deliver insights into churn risk, upsell and cross-sell opportunities, and margin improvement tactics.

Challenges

- Deploying Zilliant's advanced capabilities in organizations with low pricing maturity often necessitates significant change management and structured user education. Customers may encounter adoption friction because automation and sophisticated analytics require cultural alignment and expanded data literacy, especially when transitioning from manual or homegrown processes.
- While Zilliant serves midsize and large complex organizations, it has tailored its suite toward enterprises with robust IT and data infrastructure. Smaller businesses (those with limited budgets, simpler pricing needs, or less specialized staff) may find the total cost of ownership, implementation requirements, and functional depth less accessible or practical for their scale.
- Integration capabilities and customization options can extend implementation timelines, particularly for organizations with unique or legacy environments. In-region support, particularly outside North America and Western Europe, is less comprehensive, which may present challenges for global enterprises seeking local expertise for deployment, maintenance, and troubleshooting.

Consider Zilliant When

Consider Zilliant when seeking a comprehensive, AI-driven pricing and revenue optimization solution capable of delivering dynamic, personalized price and margin management across the entire pricing life cycle, particularly if the enterprise has complex product catalogs, multichannel sales, and ambitious profit improvement goals that require tight integration with existing business systems and a high degree of analytical maturity.

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

Price optimization and management applications are software platforms that leverage data (customer history/behavior, competitor pricing, inventory, weather, etc.) to make algorithmic decisions on the best price for items to achieve margin, inventory, and revenue goals across sales channels and locations. Algorithmic decisions leverage forecasting, segmentation, price elasticity models, ML, AI, and optimization sciences to

set prices for logical groups of products across time, locations, and touch points. Revenue and profit optimization platforms extend and evolve price optimization and management applications by including the ability for the solution to do profit or net-revenue optimization by considering discounts, COGS, shipping, rebates, and trade promotions to manage price, typically with machine learning and adding explainability. In addition, we want to evaluate vendors' abilities to do dynamic and personalized pricing which typically requires injecting external data into the pricing analysis. Therefore, evaluating the solution's data management capabilities is also in scope. This is in addition to the core price management and optimization capabilities that leverage data to manage pricing, segment customers, and make algorithmic decisions on the best price for items to achieve margin, inventory, and revenue goals across sales channels and locations.

IDC segments the revenue and profit optimization platform marketplace into two groups:

- **B2B R&PO applications (the focus of this IDC MarketScape):** These applications focus on pricing offerings that a salesperson typically sells but are increasingly being sold via B2B ecommerce and direct to consumer via B2C and B2B2C. They should have extensions/UIs that enable efficient management and communication of price and price change context to sales and customers (deal management, price guidance, and configure price quote) across channels to ensure the company can achieve its revenue, margin, or profit goals.
- **Retail-focused B2C PO&M applications:** Customized for pricing retail merchandise across channels, these applications have life-cycle pricing capabilities to price merchandise as it moves through the various stages of retail life: regular, introduction, promotion, markdown, and clearance pricing.

Strategies and Capabilities Criteria

Tables 1 and 2 provide key strategy and capability measures, respectively, to successfully select B2B-focused revenue and profit optimization platform vendors.

TABLE 1

Key Strategy Measures for Success: Worldwide B2B Revenue and Profit Optimization Platforms

Criteria	Definition	Weight (%)
Delivery	Strategy to allow for and ensure scalability (on premises, off premises, data, pricing models, transactions, customers, partnerships, geographies, regulations, etc.)	16.00
Financial/funding	Consistent growth or an increase in revenue, profit, or market share	12.00
Functionality or offering strategy	How well the company anticipates the market, its problems, and potential solutions	50.00
	Current development of offerings that will be relevant and attractive to customers over the next three to five years (A wide variety of approaches will be employed to ensure increased functional and industry capability, including market sensing capabilities, offering reinforcements, and strategic hiring and training. To ensure maximum impact, organizations will need to increase their ability to construct offerings that leverage those capabilities and provide precise value to clients.)	
	Does the company have a solid strategy to evolve its application's architecture to support future offerings, customer requirements, scalability, and performance? Includes platform vision, integrations, modules, APIs, and microservices	
	Derived by how long a company has been selling the solution and how well known the company is for its expertise in the marketplace	
R&D pace/ productivity	Evaluates the comprehensiveness and effectiveness of the vendor's research and development plan for advancing pricing software capabilities, including investments in new technologies and quick adaptation to industry changes	22.00
	Measures the vendor's contribution to advancing understanding and best practices in the field, such as producing influential research, hosting industry forums, or providing expert guidance	
Total		100.00

Source: IDC, 2025

TABLE 2

Key Capability Measures for Success: Worldwide B2B Revenue and Profit Optimization Platforms

Criteria	Definition	Weight (%)
Range of services	Considers the variety of services available, such as implementation support, training, consultancy, ongoing technical assistance, and custom integrations that improve value realization for different customer types	8.00
Pricing model or structure of product/offering	Reviews the flexibility and variety of pricing models available to accommodate diverse customer budgets, industry requirements, service levels, product type, and scalability requirements	10.00
Functionality or offering	Measures the breadth and depth of core functions that the software provides, evaluating aspects such as price optimization, elasticity modeling, revenue forecasting, and integration across platforms	58.00
	Assesses the quality, accuracy, and actionability of advanced analytics tools within the solution, including their ability to anticipate future pricing trends, demand curves, and profit scenarios	
	Rates unique features that distinguish the product in the market, such as real-time price optimization, dynamic pricing engines, scenario simulation, and customized reporting designed for complex pricing needs	
	Rates the incorporation of new technologies, such as AI, ML, and advanced automation, which enable novel approaches to profit optimization, pricing strategy, and measurable business impact	
Customer satisfaction	Reflects aggregated customer feedback and satisfaction ratings, indicating how well the product meets client expectations in vital areas, such as pricing accuracy, profitability impact, and ease of use within real-world business environments	24.00
	Measures how effectively the company's support and service teams cater to key industry segments, providing responsive, tailored assistance that drives successful adoption and business outcomes	
Total		100.00

Source: IDC, 2025

Related Research

- *From Competition to Combination: Assessing the PROS and Conga Merger* (IDC #lcUS53848225, October 2025)
- *AI Monetization Cube: A Systematic Framework for Pricing AI Offerings* (IDC #US53568425, July 2025)
- *Navigating Tokenized Pricing Models* (IDC #US52136225, July 2025)
- *IDC MarketScape: Worldwide Business Intelligence and Analytics Platforms 2025 Vendor Assessment* (IDC #US52034725, July 2025)
- *Consumption-Based Pricing in the AI Era* (IDC #US53300325, April 2025)
- *GenAI Pricing Models Survey Spotlight: Which Pricing Models Do Companies Prefer for GenAI Applications?* (IDC #US53146925, February 2025)
- *IDC MarketScape: Worldwide Configure Price Quote Applications for Commerce 2024-2025 Vendor Assessment* (IDC #US50608124, December 2024)

Synopsis

The IDC study examines the rapid transformation of the pricing discipline from manual, back-office processes to needing advanced, AI-driven platforms that integrate data, analytics, and automation for real-time, explainable pricing decisions. The report evaluates vendors on their capabilities in pricing automation, analytics, integration, and user experience, highlighting the strategic importance of these platforms for commercial agility, governance, and measurable business outcomes. Key market trends include the shift away from spreadsheets, the critical need for explainable AI, user experience as a driver of adoption, and the expansion of platforms into holistic monetization ecosystem orchestration of the commercial organization. The assessment provides detailed vendor profiles, strengths, and challenges, offering guidance for technology buyers to prioritize transparency, integration, scalability, and industry expertise when selecting solutions. Ultimately, the report underscores that organizations adopting modern R&PO platforms need to bolster their pricing teams and gain a competitive edge in fast-moving markets, while those relying on legacy tools and underinvested pricing team risk falling behind.

"We are fast approaching a world where pricing agility defines winners and laggards. The pace of change is accelerating, and organizations need the right tools so their pricing can adapt just as fast. The future of profitable growth belongs to those who harness explainable AI, real-time analytics, and automation with a pricing team empowered to drive change and grow profit. Pricing is a strategic lever that needs C-suite investment and attention, not a back-office afterthought." — Tiffany McCormick, research director, AI Monetization, Pricing Strategies, and Business Models

ABOUT IDC

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