

CPQ Buyer's Checklist for Manufacturers

Off-the-shelf or custom? Nine questions to help manufacturers of configured, made-to-order, and engineered products choose the right CPQ approach.

YOUR PRODUCTS & PRICING

- ☐ **Are your products configured, made-to-order, or engineered?** Highly variable products are where off-the-shelf CPQ struggles most.
- ☐ **Is your pricing logic complex?** Volume, options, materials, regional or dealer-specific rules.
- ☐ **Is quoting accuracy tied to margin or delivery?** If a wrong quote is expensive, the rules must be exactly right.

YOUR SYSTEMS & WORKFLOW

- ☐ **Must a quote flow into your ERP or production system?** Tight integration usually points toward custom.
- ☐ **Does quoting depend on CAD or drawings?** Configure-to-order with CAD automation rarely fits packaged tools.
- ☐ **Are you quoting in spreadsheets today?** Manual estimating is slow, error-prone, and hard to scale.

FIT & RISK

- ☐ **Does off-the-shelf CPQ force workarounds to “almost” work?** Constant add-ons and manual steps are a signal to go custom.
- ☐ **Do you want the tool to fit your process (not the reverse)?** Custom fits your workflow; packaged tools ask you to adapt.
- ☐ **Can you start with a small, scoped assessment first?** De-risk a custom build before committing to it.

Reading your answers: Mostly “yes” to the product, pricing, and integration questions means custom CPQ is likely the better long-term fit. If your products follow standard rules and you don’t need deep integration, start with a mature off-the-shelf CPQ instead. On AI: it helps at the edges (reading RFQs, suggesting configs, catching errors) — but the core pricing and configuration rules should stay deterministic and exactly right.

WHAT HAPPENS NEXT

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| <div style="background-color: #333; color: white; border-radius: 50%; width: 40px; height: 40px; margin: 0 auto; display: flex; align-items: center; justify-content: center; margin-bottom: 10px;">1</div> <p>Free 20-Min Fit Call</p> <p>A quick, no-pressure call to see if it's a fit.</p> | <div style="background-color: #333; color: white; border-radius: 50%; width: 40px; height: 40px; margin: 0 auto; display: flex; align-items: center; justify-content: center; margin-bottom: 10px;">2</div> <p>AI Opportunity Blueprint</p> <p>A focused session mapping scope, risks, and a practical path — with one scoped, costed Phase 1.</p> | <div style="background-color: #333; color: white; border-radius: 50%; width: 40px; height: 40px; margin: 0 auto; display: flex; align-items: center; justify-content: center; margin-bottom: 10px;">3</div> <p>Phased Implementation</p> <p>We build Phase 1 around what creates value now, architected to grow.</p> | <div style="background-color: #333; color: white; border-radius: 50%; width: 40px; height: 40px; margin: 0 auto; display: flex; align-items: center; justify-content: center; margin-bottom: 10px;">4</div> <p>Ongoing Support</p> <p>We support, improve, and evolve the system as you scale.</p> |
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