



Retail & eCommerce

SPARK Matrix™: B2B Price Optimization & Management, 2024

October 2024

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Executive Overview

This research report includes a detailed analysis of the global B2B Price Optimization & Management (B2B PO&M) market dynamics vendor landscape, and competitive positioning analysis. The study provides competition analysis and ranking of the leading B2B Price Optimization & Management (B2B PO&M) vendors in the form of SPARK Matrix. This research provides strategic information for technology vendors to better understand the market supporting their growth strategies and for users to evaluate different vendors' capabilities, competitive differentiation, and market position.

Market Definition and Overview

QKS Group defines B2B Price Optimization & Management Application (PO&MA) as “the part of the pricing solution that helps B2B organizations create effective pricing strategies that align business objectives by leveraging predictive and prescriptive analytics to maximize margins and recommend precise, dynamic, and optimized prices of products or services. It integrates and analyzes business data, easily manages prices, monitors, approves, and reports price changes, and provides insights into customers and markets to help organizations make informed pricing decisions.” The B2B PO&M enables organizations to adopt an accurate, granular, flexible, and integrated pricing approach, empowering them to cope with ever-changing market conditions.

Due to various factors such as increasingly complex regulatory constraints, fluctuating raw material supply and pricing scenarios, and an increasingly competitive market environment, legacy methods such as spreadsheets yield inefficient, inaccurate results and hamper overall productivity. Due to the time-consuming and tedious pricing analysis process, organizations are emphasizing transitioning from these legacy methods to comprehensive software such as B2B PO&M to adopt a dynamic pricing approach that aids in determining optimal prices. Furthermore, organizations would make pricing decisions in the absence of relevant information, such as cost volatility, competitor prices, demand, and supply. This essentially impacted the performance of organizations in terms of revenue, margin, and customer satisfaction.

Organizations also struggle to manage complex product portfolios and global operations, handle multiple suppliers’ and customers’ contracts and agreements, streamline communication amongst their stakeholders, and administer their prices to maintain margins owing to constantly changing raw material costs. The traditional pricing approaches exhibited signs of ineffectiveness and impracticality, which necessitated organizations to seek alternative procedures for addressing these challenges.

Over the past few years, organizations began implementing pricing solutions that overcame the complexity issues and made better pricing decisions. The development of B2B price optimization solutions played a key role in the way organizations set and managed their prices. The price optimization solutions assist organizations in creating

tailored segment-specific pricing strategies to meet the expectations of customers. With changing consumer preferences and market dynamics, organizations are increasingly offering appealing discounts and promotions to encourage customers to purchase their products. B2B PO&M aids organizations in creating engaging promotions to attract buyers and augment sales. The B2B PO&M also automates the pricing process, enhancing the productivity and efficiency of organizations. The B2B pricing solutions save human efforts and time, which organizations can use for other business aspects.

The B2B pricing application vendors are focusing on upgrading their solutions with recent AI/ML technological advancements, such as generative AI to automate pricing tasks and make data-driven decisions. The vendors are partnering with Cloud Service Providers (CSPs) to support cloud-based deployments and adopt the Microservices-based, API-first, Cloud-native, and Headless (MACH) framework. Organizations are implementing B2B pricing solutions for dynamically adjusting their prices owing to various factors, such as inflation, and focusing on value-based and sustainable pricing to drive sales. There is also a growing need to integrate these solutions with Configure-Price-Quote (CPQ) applications and incorporate sales intelligence, rebate management, and deal management capabilities to help organizations streamline their end-to-end sales processes. Additionally, the vendors are aiming to improve system consumerization by making continuous upgrades to their user interface to enhance the experience of users.

The following are the key capabilities of B2B price optimization and management applications:

- ◆ **Data Management:** The B2B PO&M integrates data pertaining to the organization's sales, customers, products, product lines, historical transactions, price lists, costs of goods sold, promotions, rebates, and inventory. The solution enriches data by integrating data from internal sources and external systems, such as Enterprise Resource Planning (ERP), Customer Relationship Management (CRM), CPQ, and eCommerce. Additionally, the B2B PO&M solution normalizes data and performs data cleansing by stripping any outliers from the dataset, thereby making it valuable and useful for downstream purposes, such as analytics and decision-making.

- ◆ **Price Management:** The B2B PO&M helps organizations create and set pricing strategies relevant to their business requirement. The solution assists the pricing team in managing all price types, such as list, matrix, customer-specific, negotiated, or overridden, locally and globally. It helps organizations dynamically adjust prices by enabling user-defined formulas and logic creation for mass updation of prices in response to changes in the factors influencing price. The solution also aids organizations in creating and managing promotions for customers, improving the organization's customer retention margins and win probability.
- ◆ **Price Optimization and Simulation:** The B2B PO&M helps organizations optimize prices by clustering products and segmenting customers based on similar purchase behaviors derived from historical data. The solution then builds a predictive model to test out various pricing strategies and helps the pricing team choose the most appropriate price strategy. It recommends optimal real-time prices to the users through constraint-based elasticity optimization. The B2B PO&M also helps organizations in pricing new products better, introducing them into the cluster, and predicting the behavior of new customers who match the segment's profile. The solution computes the floor price, start price, and target price for a transaction line. It also provides the rationale behind price recommendations in compelling human terms and assists users in simulating the impact of the price changes on the Key Performance Indicators (KPIs) before publishing new price lists.
- ◆ **Analytics, Dashboards, and Reporting:** The B2B PO&M uses a wide range of analytics to provide organizations with actionable insights into revenue and margin based on region, product, product line, and time. The solutions provide comprehensive and granular analytics to organizations with the help of user-friendly customizable dashboards. The insights from its analytics aid organizations in identifying any price improvement opportunities. The solution also enables organizations to analyze the pricing performance over time, visualize the price waterfall to understand the cause of any revenue or margin leakages, and evaluate the effectiveness of promotions.

Competitive Landscape and Analysis

QKS Group conducted an in-depth analysis of major B2B Price Optimization & Management Application (PO&MA) vendors by evaluating their products, market presence, and value proposition. The evaluation is based on primary research with expert interviews, analysis of use cases, and overall B2B Price Optimization & Management Application (PO&MA) market. This study includes an analysis of key vendors, including Flintfox, Model N, Periscope® by McKinsey, Price Edge, Pricefx, Pricemoov, PROS, SPOSEA, Synchron, Vendavo, Vistaar, and Zilliant.

Companies, namely Periscope® by McKinsey, Price Edge, Pricefx, PROS, SPOSEA, Vendavo, and Zilliant, are the top performers and SPARK leaders in the 2024 SPARK Matrix™ of the global B2B PO&M market. These companies offer robust out-of-the-box capabilities, user-friendly dashboards and user experiences, advanced analytics, and integration and interoperability. These capabilities help B2B organizations with price management and optimization, enabling them to create, manage, optimize, and execute effective pricing strategies.

Periscope by McKinsey's platform has a modular design where each technology module can be easily configured as building blocks to suit the needs of its clients. Periscope offers comprehensive B2B price optimization and management capabilities that assist organizations in optimizing their pricing strategies using predictive and prescriptive analytics to deliver real-time competitive prices. Additionally, its capabilities help organizations identify price change opportunities and measure the performance of prices over time.

Price Edge's solutions help B2B organizations obtain advanced pricing insights and assist them in transitioning from the usage of Excel for price setting to using robust, efficient pricing solutions. Price Edge equips organizations with Kanban boards to plan future price changes, intuitive UIs, and automatic product matching features. Additionally, its versatile solution can be configured as a CPQ application.

Pricefx is positioned amongst leaders due to its ability to solve complex pricing challenges. Pricefx uses a data-driven approach toward pricing to help B2B organizations

understand margin drivers that create effective pricing strategies. Pricefx's key technology differentiators include its customizable user interface, quote creation, rebate management, set of configurations for rapid solution deployment into the customer environment, and a Plasma benchmarking tool to help businesses objectively measure and compare their performance against their peers in the market.

PROS provides an integrated and intuitive platform that streamlines communication between the pricing, sales, and eCommerce teams. The platform leverages advanced analytics to provide optimized prices based on predictive insights. Additionally, the platform delivers omnichannel, personalized prices to organizations through traditional and digital sales channels.

SPOSEA is a technology leader that is constantly enhancing its technology offerings and market share in the B2B space. SPOSEA's pricing solutions offer automated and real-time data-driven pricing using a customer-centric pricing approach that assists organizations in improving their price strategy. Additionally, SPOSEA helps organizations manage rebates, quotes, and deals and provides a flexible user interface with a transparent approach toward pricing.

Vendavo provides extensive and in-depth capabilities that help B2B organizations create optimal pricing strategies to maximize margin, increase sales effectiveness, and improve customer experience. Vendavo offers pre-built APIs for quick integrations, ready-to-use reports, customizable dashboards, its patented Power and Risk™ algorithm to compute optimal prices, KPI Drill Tables for deep dive analytics, and its unique Transfer Price Management (TPM) feature to manage international and internal transfer prices. Furthermore, Vendavo provides a unified customer experience, assisting organizations in delivering optimized price quotes to the right customer by performing impact analysis.

Zilliant offers exhaustive, intuitive, and out-of-the-box pricing solutions built on the microservices architecture. Its data-driven pricing solutions help B2B organizations address pricing complexities, prevent revenue leakages, and generate and deliver dynamic omnichannel prices. Zilliant provides a unique campaign management application that enables organizations to create and manage time-bound promotional campaigns. Furthermore, the company focuses on providing end-to-end pricing solutions

that facilitate best-in-class price science, faster optimization times, intuitive user interfaces, and quick-to-implement core pricing features to help organizations meet their goals.

The B2B vendors, such as Flintfox, Model N, Pricemoov, Synchron, and Vistaar, are positioned as strong contenders in the 2024 SPARK Matrix™. These vendors provide comprehensive technological capabilities and are continuously enhancing their offerings to gain market traction in the B2B price optimization space. They are rapidly growing their presence across geographies and industry verticals by acquiring new clients and augmenting their market share. Furthermore, these vendors are aware of the upcoming market trends and have laid out a detailed roadmap to capitalize on future growth opportunities.

Flintfox's platform facilitates users to set real-time competitive prices and ensures customer satisfaction by offering accurate and fair pricing, which strengthens customer loyalty and retention. The platform automates complex pricing tasks to streamline operations and improve the efficiency of pricing processes. Further, the platform's analytical capabilities enable users to gain in-depth insights into pricing and assist them in making data-driven decisions.

Model N provides enterprise-grade pricing solutions that empower organizations with validated and real-time pricing information to help them devise their pricing strategies. The solutions enable B2B organizations to execute effective and optimized pricing strategies for maximizing revenue. Furthermore, the solutions assist organizations in decreasing revenue leakage and help them improve revenue and overall margins by optimizing prices throughout the price waterfall.

Pricemoov's pricing platform helps organizations set, manage, optimize, and negotiate prices with ease. The platform enables B2B organizations to maximize their revenue and simplify their overall pricing. Pricemoov offers deal management, quoting, and seamless integration capabilities through its user-friendly UIs. Pricemoov has partnered with various technology companies to obtain competitive intelligence for providing key actionable competitive insights.

Syncron enables manufacturers, dealers, and suppliers in the aftermarket business to automate and optimize pricing and improve their pricing strategies for achieving their business objectives. Syncron's pricing solution leverages AI to identify pricing opportunities that positively impact the overall organizational performance.

Vistaar's pricing solutions enable organizations to optimize prices, promotions, and rebates, helping them easily configure complex products. The solutions provide tailored dynamic prices to the users and deliver optimal quotes to the sales representatives. Vistaar's pricing platform facilitates quick user adoption with its intuitive UI. It also enables efficient data integration by creating a single unified data model using its extensible architecture.

B2B Price Optimization and Management Application (PO&MA) vendors are focusing on improving their technology value proposition by enhancing key functionalities, such as price optimization, price management, price setting, customer segmentation, price guidance, margin optimization, and discount/rebate management. Vendors are focusing on supporting seamless integration with CPQ, CRM, and ERP to enhance the end-to-end sales process. Organizations face difficulties in finding the right B2B PO&M tools that are suitable for their industry-specific and organization-specific use cases due to the availability of multiple tools with varying capabilities.

While a majority of the vendors may provide all the core capabilities, the breadth and depth of these capabilities may differ based on the vendors' offerings. Organizations should evaluate B2B PO&M vendors whose comprehensive capabilities provide seamless integration with various organization-owned tools and platforms, scalability and extensibility, and the ability to effectively segment and target customers. Additionally, the vendor's customer value proposition may differ in terms of ease of deployment, ease of use, price/performance ratio, support for a broad range of use cases, and global support service. The retail space across B2B and B2C segments is continuously transforming, requiring vendors to expand their R&D investments, make continuous enhancements to their software, and provide a robust technology value proposition to meet future customer needs. The vendor's ability to accommodate emerging technology trends, artificial intelligence, and machine learning technologies to a holistic and unified platform is increasingly becoming the key differentiator when selecting a B2B PO&M vendor.

Key Competitive Factors and Technology Differentiators

The following are the key competitive factors and differentiators for the evaluation of B2B Price Optimization & Management Application (PO&MA) vendors. While a majority of the B2B PO&M offers all the core functionalities, the breadth and depth of functionalities may differ based on the vendors' offerings. Driven by increasing competition, vendors are enhancing their technology capabilities and overall customer value proposition to remain competitive. Some of the key differentiators of B2B Price Optimization & Management Application include:

- ◆ **Rebate Management:** The B2B price optimization and management application vendors should enable organizations to create personalized rebate programs, seamlessly manage and execute complex rebate agreements, increase sales, and improve customer loyalty. It should enable organizations to create a wide array of rebate programs, such as volume rebates, incremental rebates, tiered rebates, and other incentives-focused rebates for strengthening long-term customer loyalty. The rebate management capability should also enable organizations to analyze and obtain insights into the performance of rebates through intuitive dashboards. Furthermore, the capability should offer approval workflows to increase the efficiency of rebate processes and ensure stakeholder collaboration. Organizations should look for vendors that provide effective rebate management capabilities to enhance their user engagement across channels and improve and optimize their revenue with effective and measurable incentive programs.
- ◆ **Agreement Management:** Organizations should look for B2B price optimization and management application vendors that help them create, manage, and renew customer-specific price agreements and secure optimal deals with customers. The capability should also assist organizations in identifying, monitoring, and analyzing a wide range of deal-related parameters, such as customer's purchase history, discount levels provided to customers, and operational constraints, to facilitate optimal deal creation for their customers. Additionally, the capability should help

organizations efficiently manage the entire agreement lifecycle, including negotiation, contract creation, modifications, and renewals of various agreement types. Organizations should look for vendors whose agreement management capability facilitates seamless communication between the pricing and sales teams, enabling them to create new agreements that take into account margin goals and customer relationships and obtain actionable insights into each deal.

- ◆ **Competitive Intelligence:** Organizations should look for a B2B price optimization and management application that offers a robust Competitive Intelligence (CI) capability, which enables them to create optimal pricing strategies by incorporating real-time competitive insights. The CI capability utilizes AI-driven attribute-based matching, elastic search, and image recognition for matching products with the competitors across the entire store. The CI capability of the vendor's application should automatically recommend product matches to users based on various item attributes and allow the users to validate the matches. Furthermore, the capability must provide dashboards that can deliver competitive insights on price positioning, assortment structure, and breadth and depth of promotions to help retailers understand the competitive environment and create effective and efficient processes that maximize sales. Organizations should look for an application with comprehensive CI capability that integrates data from multiple sources and provides them with accurate real-time omnichannel competitive pricing data and insights.
- ◆ **Use of Generative AI:** Organizations should look for a B2B price optimization and management application based on the advanced technologies it leverages. The application should utilize generative AI to help users analyze customer behavior data and gain better insights into customer preferences. This enables users to quickly generate customer-specific personalized quotes and helps close deals faster by reducing the quote turnaround time, thereby accelerating the sales cycle and enhancing revenue. Additionally, the technology helps users enrich their data regarding product attributes to gain better competitive insights. Organizations should look for an application offering advanced technology that provides tailored

product recommendations, promotions, and content to users for personalized customer experience.

- ◆ **Sales Intelligence:** The B2B price optimization and management application vendors should offer organizations cross-sell/upsell recommendations, customer churn analytics, and gap analysis to help them increase sales and get better insights into potential customers. The sales intelligence capability of the vendor's offering should provide tailored product recommendations for upselling and cross-selling using machine learning to increase the order value and average Customer Lifetime Value (CLV). The capability should assist organizations in analyzing various customer behaviors, such as churn rate within a segment, low product usage, lack of customer engagement, and inconsistent buying behaviors, for identifying the likelihood of customer churn. Furthermore, it must enable organizations to estimate the likelihood of closing a deal based on various customer, competitor, product, and pricing parameters. Organizations should look for vendors whose sales intelligence capability enables them to improve lead generation, increase conversions, close additional deals, and obtain a better understanding of current and potential customers.
- ◆ **Intuitive User Interface:** The B2B price optimization and management application vendors should offer interactive and intuitive user interfaces that help organizations streamline complex processes and workflows and provide real-time visibility into the price performance. It should also provide a configurable user interface that meets the specific needs of various user groups using role-based access controls and permissions to help organizations manage and optimize their end-to-end pricing. Additionally, vendors should offer simple navigation, automated workflows, and reminders with clear and concise instructions, and error-free operation. Organizations should look for vendors offering intuitive user interfaces that enable them to complete tasks quickly and efficiently to improve their productivity.
- ◆ **Product Strategy and Roadmap:** The B2B price optimization and management platform providers should focus on creating a comprehensive technology roadmap and constantly innovate their offerings to help organizations drive business growth. Vendors should have strong knowledge of current market

dynamics to identify areas of investment for maximizing their customers' Return On Investment (ROI). Vendors should continuously evolve their platforms with the latest technologies, such as AI/ML, and AR/VR to support automation and improve the efficiency of their clients. Organizations should choose vendors based on the vendor's ability to align its platform with emerging market opportunities, trends, and evolving business requirements, enabling it to gain a competitive edge and improve customer satisfaction.

- ◆ **Scalability:** The B2B price optimization and management platform vendors should offer a scalable platform that enables organizations to manage and process large volumes of data and transactions with minimal time and resources. Vendors should have the ability to support increasing amounts of data and handle varying workloads as per the requirements of the business to improve productivity, reduce downtime, and satisfy users. Organizations should opt for vendors that can scale enough to respond to fluctuations in system processing demands and suit the requirements of small, medium, and large enterprises.
- ◆ **Application Diversity:** The B2B price optimization and management application vendors should have the ability to deploy their applications across a range of industry verticals and quickly adapt their offerings based on the industry their customers operate. Organizations must look for vendors that support various use cases, such as managing global and country price lists, administering inflation and cost-pass through using real-time pricing, optimizing and setting prices through advanced analytics, maximizing deal outcomes using data-driven insights, and generating customer-specific price quotes.
- ◆ **Seamless Integration:** The B2B price optimization and management application vendors should facilitate seamless integration of their offerings with the organization's existing systems, such as ERP, CRM, CPQ, and eCommerce channels, to enable data exchange. The capability should help organizations attain quicker deployment, lower IT involvement, and faster time to value. Organizations should look for vendors with out-of-the-box integration connectors, webhooks, RESTful API, and API documentation to ensure smooth data flow, eliminate redundancies, and streamline operations.

- ◆ **Deployment and Accessibility:** B2B price optimization and management application vendors should offer multiple deployment models, such as on-premises, cloud, or hybrid, to suit the business requirements of organizations. Organizations must look for vendors that provide mobile applications to access their features, such as approvals, entering comments, reviews, and negotiations, to have quick and easy access to the features from anywhere.

SPARK Matrix™: Strategic Performance Assessment and Ranking

QKS Group SPARK Matrix provides a snapshot of the market positioning of the key market participants. SPARK Matrix provides a visual representation of market participants and provides strategic insights on how each supplier ranks related to their competitors concerning various performance parameters based on the category of technology excellence and customer impact. QKS Group's Competitive Landscape Analysis is a useful planning guide for strategic decision-making, such as finding M&A prospects, partnerships, geographical expansion, portfolio expansion, and similar others.

Each market participant is analyzed against several parameters of Technology Excellence and Customer Impact. In each of the parameters (see charts), an index is assigned to each supplier from 1 (lowest) to 10 (highest). These ratings are designated to each market participant based on the research findings. Based on the individual participant ratings, X and Y coordinate values are calculated. These coordinates are finally used to make the SPARK Matrix.

Technology Excellence	Weightage
Data Management	12%
Price Management	18%
Price Optimization and Simulation	18%
Analytics, Dashboards, and Reporting	15%
Competitive Differentiation Strategy	15%
Integration and Interoperability	10%
Vision and Roadmap	12%

Customer Impact	Weightage
Product Strategy and Performance	20%
Market Presence	20%
Proven Record	15%
Ease of Deployment and Use	15%
Customer Excellence	15%
Unique Value Proposition	15%

Evaluation Criteria: Technology Excellence

- ◆ **Data Management:** Evaluates the ability to fetch and combine data from multiple sources such as ERP, CRM, etc., declutter, mine, and organize it for further processing.
- ◆ **Price Management:** Evaluates the ability to create, modify, and update pricing rules for every item set in the business' complex portfolio across multiple channels as well as formulate effective pricing strategies aligned with business goals.
- ◆ **Price Optimization and Simulation:** Evaluate capability to leverage predictive and prescriptive analytics, cluster products, segment customers, and determine the optimal price point of a product based on the pricing strategy set.
- ◆ **Analytics, Dashboards, and Reporting:** Evaluate the ability to provide user-friendly, interactive, and customizable dashboards consistently monitoring KPIs; track real-time customers and sales insights, perform rigorous in-depth analysis, and pull out actionable insights.
- ◆ **Integration and Interoperability:** Evaluates the ability to exchange data with multiple platforms and partner ecosystems.
- ◆ **Competitive Differentiation Strategy:** Evaluates the ability to distinctly differentiate from the rivals.
- ◆ **Vision and Roadmap:** Evaluation of the vendor's product strategy and roadmap with the analysis of key planned enhancements to offer superior products/technology and improve the customer ownership experience.

Evaluation Criteria: Customer Impact

- ◆ **Product Strategy and Performance:** Evaluation of multiple aspects of product strategy and performance in terms of product availability, price-to-performance ratio, excellence in GTM strategy, and other product-specific parameters.
- ◆ **Market Presence:** The ability to demonstrate revenue, client base, and market growth along with a presence in various geographical regions and industry verticals.
- ◆ **Proven Record:** Evaluation of the existing client base from SMB, mid-market, and large enterprise segments, growth rate, and analysis of customer case studies.
- ◆ **Ease of Deployment and Use:** The ability to provide superior deployment experience to clients supporting flexible deployment or demonstrate superior purchase, implementation, and usage experience. Additionally, vendors' products are analyzed to offer a user-friendly UI and ownership experience.
- ◆ **Customer Excellence:** The ability to demonstrate vendor capability to provide a range of professional services from consulting, training, and support. Additionally, the company's service partner strategy or system integration capability across geographical regions is also considered.
- ◆ **Unique Value Proposition:** The ability to demonstrate unique differentiators driven by ongoing industry trends, industry convergence, technology innovation, and others.

SPARK Matrix™:

B2B Price Optimization & Management (B2B PO&M)

Strategic Performance Assessment and Ranking

Figure: 2024 SPARK Matrix™

(Strategic Performance Assessment and Ranking)

B2B Price Optimization & Management (B2B PO&M) Market



Vendors Profile

The following vendor profile is written based on the information provided by the vendor's executives as part of the research process. The QKS Group's research team has also referred to the company's website, whitepapers, blogs, and other sources for writing the profile. A detailed vendor profile and analysis of all the vendors, along with various competitive scenarios, are available as a custom research deliverable to our clients. Users are advised to directly speak to respective vendors for a more comprehensive understanding of their technology capabilities. Users are advised to consult QKS Group before making any purchase decisions, regarding B2B Price Optimization & Management (B2B PO&M) application and vendor selection based on research findings included in this research service.

Flintfox

URL: <https://www.flintfox.com>

Flintfox, founded in 1987 and headquartered in Auckland, New Zealand, operates in the software development industry and is a provider of intelligent pricing and rebate management solutions for B2B organizations across industries including retail, manufacturing, and wholesale distribution.

Flintfox offers the Intelligent Pricing & Rebates Platform that supports seamless integration with any Enterprise Resource Planning (ERP) system, facilitating organizations to manage complex pricing structures, automate trade agreements, and execute promotions and rebates in real-time. The platform simplifies pricing by automating manual processes and leveraging advanced analytics for better visibility and insights, enabling organizations to improve margins and efficiency. The platform's key capabilities include real-time price execution, rebate management, and comprehensive pricing and margin analytics.

Analyst Perspective

Key Differentiators

- ◆ Flintfox's Intelligent Pricing & Rebates platform helps users seamlessly create and manage various rebate types, including percentage-based, monetary, and volume-related incentives. The platform's rebate management capability enhances control over cash flow by providing users with complete visibility and accuracy of the rebate process. The capability supports multiple features that allow users to easily track, reconcile, and automate rebate processes, enabling users to effectively manage supplier and customer rebates. This helps reduce errors and ensure timely and accurate rebate payments, leading to better financial management and operational efficiency.
- ◆ Flintfox provides a centralized repository for managing and executing pricing activities with suppliers and buyers. The platform offers a rules-based pricing

framework that ensures consistency and transparency while minimizing errors. The platform allows users to seamlessly create and manage flexible agreements, enabling them to easily manage promotions, discounts, and rebates. Additionally, it enhances operational efficiency by automating and streamlining processes and providing a single source of truth for all pricing data. This further helps reduce administrative workloads and minimize margin leakage.

- ◆ The company's platform streamlines the management of payment processes and transaction tracing to improve operational efficiency. The platform automates these functions, enabling organizations to execute pricing quickly and accurately while minimizing the risk of errors. Further, the platform supports advanced mapping and validation tools that ensure precise matching of transactions that help users maintain accurate financial records. This minimizes revenue leakage and provides users with comprehensive visibility into financial flows, enabling them to make informed decisions.

Product Strategy

- ◆ **Strategic Roadmap:** Flintfox focuses on continuous innovation with a strategic roadmap focused on industry-specific capabilities that address the evolving needs of customers in managing complex pricing and rebates. The company is committed to enhancing its platform's capabilities to support diverse use cases, including the expansion of commerce channels, and the introduction of new promotions and rebates. A key aspect of this innovation is bridging gaps in ERP systems by offering advanced functionalities beyond their standard capabilities. Additionally, Flintfox emphasizes ongoing customer support and training, ensuring clients achieve faster time-to-value and maximize the platform's potential.

Customer Success Strategy

- ◆ Flintfox focuses on building a robust partnership ecosystem and has a wide range of technology, advisory, and integration partners. The partnership helps the company deliver enhanced solutions to its clients and provide a seamless user experience. Additionally, the partnership network includes industry associations that help the

company enhance its reach, visibility, and collaboration opportunities with industry experts, ensuring increased networking and engagement.

Market Strategy

- ◆ **Geo-expansion Strategy:** Flintfox has a global footprint with a geographical presence across various regions, including North America, EMEA, LATAM, and APAC.
- ◆ **Industry Presence:** Flintfox serves customers across industries, including wholesale and distribution, manufacturing, Consumer Packaged Goods (CPG), life sciences, and retail.
- ◆ **Use Case Support:** Flintfox's platform supports various use cases, such as centralizing pricing to offer a unified approach to set and manage prices, providing real-time pricing across the buy-side and sell-side to improve the efficiency of pricing processes while ensuring consistency and accuracy of prices, managing complex pricing across geographies, customer segments, and item groups, streamlining discount management including off-invoice deductions, bill backs, high levels of price breaks, and accrued promotions across regions, and optimizing prices to maximize revenue.

Trend Analysis

- ◆ B2B pricing application vendors are focusing on upgrading their solutions with recent AI/ML technological advancements, such as generative AI, to automate pricing tasks and make data-driven decisions. Organizations are implementing B2B pricing solutions for dynamically adjusting their prices due to various factors, such as inflation, and focusing on value-based and sustainable pricing to drive sales. Vendors aim to improve system consumerization by making continuous upgrades to their user interface to enhance users' experience.
- ◆ Flintfox offers a scalable platform that incorporates various factors to support complex pricing and rebates, helping organizations maximize revenue. The platform supports automation to streamline complex pricing tasks and utilizes advanced analytics to enable users to make data-driven pricing decisions. The platform offers rebate

management capability to help users seamlessly manage complex rebates. Further, the platform natively integrates with Microsoft Dynamics 365 and SAP, facilitating organizations to improve their end-to-end sales processes.

- ◆ As Mergers & Acquisitions (M&A) continue to be a lever of growth for many organizations, Flintfox enables companies with multiple ERPs to bring pricing and rebate data together, creating a single source of truth. This facilitates real-time pricing updates and allows users to seamlessly execute rebates, promotional pricing, and price catalogs while reducing margin leakage.

Final Take

- ◆ Flintfox's Intelligent Pricing & Rebates Platform helps organizations with complex pricing and rebates, centralize pricing into a single source of truth, and execute pricing at speed and scale with the Flintfox Performance Pricing Engine. The platform automates complex pricing tasks to streamline operations, improve the efficiency of pricing processes, and reduce errors. Further, the platform's analytical capabilities enable users to gain in-depth insights into pricing and assist them in making data-driven decisions.
- ◆ Users seeking a B2B pricing vendor with a global footprint, offer a scalable and configurable platform for medium-sized and enterprise-level businesses, has a robust partnership network to enhance the functionalities of its platform, supports seamless integration with any ERP system, and provides comprehensive omnichannel pricing capabilities with multiple use cases across various industry verticals could opt for the Flintfox platform.

Model N

URL: <https://www.modeln.com>

- ◆ Established in 1999 and headquartered in California, USA, Model N operates in the software development industry and offers integrated technology, data, analytics, and expert services to provide organizations with insights to make data-driven decisions. Model N is a provider of Revenue Cloud, a cloud-based AI-driven platform that helps enterprises manage and optimize their pricing, incentives, and contracts to improve revenue and margins. The platform enables organizations to optimize the quote-to-cash process with comprehensive functionality for Configure-Price-Quote (CPQ), Contract Lifecycle Management (CLM), rebate management, Market Development Fund (MDF) management, and Channel Data Management (CDM).
- ◆ The company offers various SaaS-based revenue management solutions, as part of its platform, that facilitate organizations to gain visibility into their performance and streamline their operations while driving revenue and improving margins.
- ◆ The company provides various B2B pricing and sales solutions, as part of its revenue management suite, including Price Intelligence, Rebate Management, Global Price Management, and Deal Management with Deal Intelligence add-on analytics. These solutions enable organizations to ensure consistent and accurate pricing across channels and geographies and improve their end-to-end sales process. The solutions offer comprehensive B2B pricing capabilities, that include price analytics, rebate management, price management, quote management, deal management, and deal analytics.

Analyst Perspective

Key Differentiators

- ◆ Model N's Rebate Management solution facilitates users to create and manage complex rebate programs. The solution provides users with insight into rebate

programs' effectiveness by allowing them to analyze the impact of rebates on margins. The rebate management capability automates rebate calculations, eligibility checks, claim validations, and approval routing to streamline processes and minimize errors for improved profitability and customer satisfaction. Additionally, the capability helps in reducing overpayment errors, generates accurate accruals, and makes timely accurate rebate payments to eligible customers.

- ◆ Model N's Deal Management solution supports quote management capability that leverages AI/ML to streamline the quoting process and enables users to minimize quote turnaround time, quickly close deals, and improve sales. The solution also offers deal management capability for streamlining the price negotiation and contract creation processes. It supports approval workflows and enables automatic contract creation from quotes. Furthermore, it provides users with what-if analysis to obtain deal score insights and aid in predicting the probability of winning a deal.
- ◆ The company's Deal Intelligence add-on analytics supports price optimization to provide optimal price recommendations and price guidance to the users. It leverages AI/ML to analyze customers, prices, margins, win-loss, and competitive data for optimizing prices that maximize revenue and margins.

Product Strategy

- ◆ **Strategic Roadmap:** Model N's strategic roadmap focuses on incorporating advanced technologies such as AI/ML to automate and streamline price setting. The company plans to continuously introduce new features to extend the functionalities of its platform, support multiple use cases, meet evolving client needs, and align with market trends. Additionally, the company emphasizes sustainability, as well as ongoing customer support and training, to help clients realize faster time-to-value and maximize the platform's benefits.

Customer Success Strategy

- ◆ Model N supports cloud-based deployments and follows a subscription-based pricing approach.

- ◆ Model N focuses on building a robust partnership ecosystem and has a wide range of partners to provide better value to its clients. The company's partnership network helps offer various value-added professional services to clients, including strategy, implementation, and support of Model N solutions.

Market Strategy

- ◆ **Geo-expansion Strategy:** Model N has a strong geographical presence across the NA, followed by the EMEA and APAC regions.
- ◆ **Industry Presence:** Model N serves customers across various industries including pharmaceutical, medical technology, semiconductor, and high technology.
- ◆ **Use Case Support:** Model N's platform supports various use cases, such as negotiating prices with the help of advanced customers and quote analysis, improving deal conversions by reducing quote cycle times, and automating the quoting process according to pre-established price lists, pricing rules, and contract terms to ensure consistency and accuracy of prices across channels and geographies.

Trend Analysis

- ◆ The B2B pricing application vendors are focusing on upgrading their solutions with recent AI/ML technological advancements, such as generative AI to automate pricing tasks and make data-driven decisions. The vendors are partnering with Cloud Service Providers (CSPs) to support cloud-based deployments and adopt the Microservices-based, API-first, Cloud-native, and Headless (MACH) framework. Organizations are implementing B2B pricing solutions for dynamically adjusting their prices owing to various factors, such as inflation, and focusing on value-based and sustainable pricing to drive sales. There is also a growing need to integrate these solutions with Configure-Price-Quote (CPQ) applications and incorporate sales intelligence, rebate management, and deal management capabilities to help organizations streamline their end-to-end sales processes. Additionally, the vendors are aiming to improve system consumerization by making continuous upgrades to their user interface to enhance the experience of users.

- ◆ In these areas, Model N focuses on delivering a cloud-based platform with a flexible and scalable architecture to enhance performance, reusability, and security. The platform integrates multiple factors to support dynamic list pricing, aiming to maximize revenue. Additionally, the company offers quoting, deal management, and sales intelligence capabilities to help organizations streamline their quote-to-cash processes.

Final Take

- ◆ Model N's SaaS-based integrated platform supports end-to-end pricing and sales capabilities that assist organizations in creating and managing dynamic pricing strategies to deliver optimized prices across multiple channels in real-time. The company's pricing solutions enable users to optimize prices across multiple channels and regions, support approval workflows, and provide analytics and actionable insights to help maximize revenue and margin. Further, the solutions assist organizations in decreasing revenue leakage and help in improving revenue and overall margins by optimizing prices across the price waterfall.
- ◆ Users looking for a B2B pricing vendor that has a strong customer base across NA, has a core focus on the healthcare sector and provides comprehensive pricing and sales capabilities while offering multiple use cases across various industry verticals could choose Model N's platform.

Periscope® by McKinsey

URL: <https://www.mckinsey.com/>

Periscope by McKinsey, a division of McKinsey & Company's Growth, Marketing & Sales Practice, was founded in 2007. The company offers advanced analytics solutions, software tools, and expert support to drive revenue and margin growth. The company's Periscope platform provides marketing solutions, customer experience solutions, category solutions, B2B and B2C pricing solutions, and sales solutions to improve profitability for enterprises.

Periscope by McKinsey's B2B pricing solutions suite includes Price Advisor, Performance Vision, Deal Advisor, and Market Vision. These solutions utilize advanced analytics and real-time insights to facilitate B2B organizations with price setting, price guidance, price negotiations, discount management, and pricing performance management. The solutions enable users to optimize their pricing and sales strategies and make data-driven decisions. The solutions offer comprehensive B2B pricing capabilities, including data management, price analytics, AI-driven price optimization, price management, product relationship management, task management, rebate management, quote management, and deal management.

Analyst Perspective

Key Differentiators

The Price Advisor solution includes the Relationship Manager module that enables users to create and manage complex product relationships across items in the catalog, such as good-better-best, local vs, national brand, price line, price family, and pack size. The module uses generative AI to analyze product content to identify and recommend product relationships based on product similarity. This facilitates users in creating price strategies and efficiently managing item prices. The module helps users view product hierarchy through visual representation of item linking to better understand the relationships between products. It enables users to define price

architecture by allowing them to create price gaps and gap types across the product hierarchy. This helps create and implement effective pricing strategies that maximize the margins.

Price Advisor's Launchpad module automatically generates and prioritizes tasks for users based on defined rules and thresholds that significantly impact key metrics such as sales and margin. This enables users to determine price improvement opportunities and helps efficiently manage their pricing tasks across modules. This further streamlines task management for users and enhances their efficiency. The module provides automated alerts and recommendations that notify users of various scenarios, such as the decrease in margin thresholds, violation of rules and guardrails, and fluctuations in market conditions.

The company's Market Vision solution uses generative AI algorithms to support the automatic matching of products with competitors based on the items' similarity. The solution facilitates scraping and collecting competitors' pricing and product data to provide users with actionable insights into competitors' pricing strategies. The insights enable users to respond to market price changes at granular levels, such as competitors, competitor type, and category. The solution leverages generative AI for enriching image and attribute descriptions to improve product data quality for better match results.

Periscope by McKinsey's Deal Advisor solution facilitates negotiation, quoting, and deal-specific configuration, such as cross-sell and upsell recommendations, customer-specific rebate programs, and rental payment structures to streamline the deal creation and quote generation processes. The solution offers users price guidance to help determine the optimal price of specialty products based on value-based pricing. The solution supports Dynamic Deal Scoring (DDS) algorithms for providing users with insights into optimal quote pricing for maximizing deal outcomes. Further, it supports automated deal approval workflows based on business rules and user-defined logic to ensure seamless collaboration, streamline approvals, and reduce time-to-quote.

Product Strategy

- ◆ **Technology Roadmap:** Periscope by McKinsey emphasizes ongoing investment and innovations to its platform and has a robust technology roadmap to support extended use cases and align with evolving client needs and market trends while ensuring sustainable growth. Periscope by McKinsey aims to continue developing its suite of pricing solutions to support the entire pricing journey for users. The company plans to make continuous improvements and strengthen the front-end, discount/rebate, and analytics capabilities. The company also plans to focus on adding new use cases, such as micro-market pricing, lead generation, propensity modeling, and churn to improve customer acquisition, retention, and revenue generation. The company aims to assess and introduce generative AI into the price creation and price execution workflows to enhance efficiency, accuracy, and decision-making.
- ◆ **Strategic Roadmap:** Periscope by McKinsey's strategic roadmap focuses on collaborating with McKinsey & Company's team to ensure pricing solutions support and enhance McKinsey's efforts in strategic consulting and technology. This collaboration helps align pricing solutions with McKinsey's consulting projects to ensure the solutions complement the strategic and technological initiatives being implemented. The company focuses on providing ongoing customer support and training to help clients achieve faster time-to-value and maximize the platform's benefits.

Customer Success Strategy

- ◆ Periscope by McKinsey offers both McKinsey cloud-based deployment and private cloud options for clients who prefer to manage the tools independently, tailored to the specific needs and requirements of each client. The company's pricing model incorporates various factors to provide clients with tailored pricing options, addressing their unique needs.
- ◆ Periscope by McKinsey's partnership ecosystem includes various technology and channel partners to deliver better value to its clients. The technology partnership with Salesforce helps the company integrate its pricing programs with Salesforce apps to provide a seamless and efficient experience for customers. As part of McKinsey &

Company, Periscope provides clients with comprehensive services, such as pricing strategy consulting, configuration support, change management, and training. These services support clients in seamlessly implementing the platform, enabling them to achieve faster time-to-value.

Market Strategy

- ◆ **Geo-expansion Strategy:** Periscope by McKinsey has a global footprint with a strong geographical presence across North America, followed by EMEA and JAPAC regions.
- ◆ **Industry Strategy:** Periscope by McKinsey serves customers across industries, including logistics and transportation, manufacturing, automotive, mining and construction, healthcare and life sciences, and oil and gas. The company plans to develop industry-specific templates to solve industry-specific use cases with capabilities customized to the needs of the customers, facilitating customers to realize faster time-to-value.
- ◆ **Use Case Support:** Periscope by McKinsey's platform supports various use cases, such as leveraging advanced analytics to create, test, and optimize pricing models, setting and managing optimal list prices, creating and managing complex product relationships for efficient price management, analyzing pricing performance and identifying price improvement opportunities, and implementing analytical models to improve pricing performance on an ongoing basis.

Trend Analysis

- ◆ The B2B pricing application vendors are focusing on upgrading their solutions with recent AI/ML technological advancements, such as generative AI to automate pricing tasks and make data-driven decisions. Vendors are adopting the Microservices-based, API-first, Cloud-native, and Headless (MACH) framework. Organizations are implementing B2B pricing solutions for dynamically adjusting their prices due to various factors, such as inflation, and focusing on value-based and sustainable pricing to drive sales. There is also a growing need to integrate these solutions with Configure-Price-Quote (CPQ) applications and incorporate sales intelligence, rebate

management, and deal management capabilities to help organizations streamline their end-to-end sales processes. Vendors are aiming to improve system consumerization by making continuous upgrades to their user interface to enhance the experience of users.

- ◆ Periscope by McKinsey plans to focus on enhancing the platform's AI capabilities, such as strengthening generative AI, to help clients maximize the platform's benefits. Periscope by McKinsey's cloud-native platform supports flexible and scalable architecture for improved performance, configurability, and usability. The platform incorporates various factors to support dynamic and automated pricing to maximize revenue and enhance the efficiency of the pricing process. The company offers quoting, rebate management, deal management, and sales intelligence capabilities and plans adding further analytics and use cases to help customers streamline their quote-to-cash process. The company aims to continuously simplify its solutions' UIs to enhance the experience of users and improve their overall efficiency.

Final Take

- ◆ Periscope by McKinsey's SaaS-based integrated platform consists of multiple technology layers, which can be customized to suit the specific needs of clients. The platform facilitates data ingestion, connectivity, price normalization, and optimization, and supports seamless integration with various systems through APIs. The platform incorporates business logic, such as pipeline analytics, cross-sell, and churn, to seamlessly deliver insights on pricing, customer acquisition, and churn prevention to the front-end tools. The company offers a low-code platform that enables users to add use cases through an intuitive configuration-based interface.
- ◆ Users seeking a B2B pricing vendor that has a strong customer base across North America and Europe and offers a modular and flexible platform with scalable architecture, enabling users to tailor or add use cases in logical order as per their requirements, provides comprehensive pricing and sales capabilities and has a robust technology roadmap while offering multiple use cases across industry verticals could select Periscope by McKinsey's platform.

Price Edge

URL: <http://www.priceedge.se>

Price Edge, established in 2014 and headquartered in Stockholm, Sweden, is a B2B price management company in the software development industry. The company provides a cloud-based price optimization and management platform for enterprises. The platform helps organizations create and optimize pricing strategies to maximize their margins.

Price Edge offers various applications as part of its PriceEdge Price platform, including PriceEdge Collect, PriceEdge Quote, and PriceEdge Optimize, which support end-to-end pricing processes. The company offers robust B2B pricing capabilities, including price setting, price execution, and price monitoring.

Analyst Perspective

Key Differentiators

Price Edge's Quote application helps organizations create accurate, consistent, and competitive quotes. The application also enables users to organize, track, and approve customer-specific quotes to streamline the quoting process. The application supports automated approvals to streamline the approval process for quotes. This, in turn, enables organizations to improve their quoting process and increase sales.

Price Edge's Collect application offers a price crawler tool for collecting competitors' prices and supports an automatic product-matching feature to provide users with competitive insights. Price Edge enables users to configure its platform as a Configure-Price-Quote (CPQ) application to reduce quote iterations, decrease customer churn, increase win rates, and improve margins.

Product Strategy

- ◆ **Technology Roadmap:** Price Edge's technology roadmap focuses on continuous innovations and technology enhancements to deliver additional capabilities to its

clients and meet their growing requirements. The company focuses on improving its time-to-value by building additional out-of-the-box connectors and launching packages or templates that users can integrate with their systems. The company plans to leverage generative AI wherever applicable and provide end-to-end setups for distributors, from supplier price lists to sending price lists. It also plans to release the Supplier Portal for managing cost updates and further develop its analytics and contextual AI-driven insights to help organizations make data-driven decisions.

- ◆ **Strategic Roadmap:** Price Edge intends to serve mid-market enterprises planning to transition from spreadsheets or custom built-in applications to advanced, scalable, and flexible pricing solutions. The company aims to offer comprehensive solutions tailored to the unique client requirements to help them improve operational capabilities and streamline their processes.

Market Strategy

- ◆ **Geo-expansion Strategy:** Price Edge has a robust geographical presence across EMEA, followed by North America. The company also has a small presence in the JAPAC region. The company aims to leverage its partner network to expand in North America to acquire new clients and grow its customer base.
- ◆ **Industry Presence:** Price Edge serves customers across industries, such as manufacturing, distribution, aftermarket, and eCommerce sectors. The company plans to continue focusing on the distribution sector and expand its market share.
- ◆ **Use Case Support:** Price Edge's platform supports various use cases, such as managing price lists, improving sales and margins through automated price logic, setting and managing prices across the price waterfall, and utilizing market-based and value-based pricing strategies to maximize margin. The platform also supports managing prices using automated workflows, such as for approvals.

Customer Success Strategy

- ◆ Price Edge supports cloud-based deployments and provides subscription-based licensing options. The company offers multiple editions of its platform, including Essential, Standard, and Enterprise, tailored to customer requirements with different pricing options based on the number of users, price lists, and products.
- ◆ Price Edge focuses on building a robust partnership ecosystem and has a wide range of technology and channel partners. The company leverages its growing network of partners for implementation and improving the time-to-value for its clients. The company's technology partners provide infrastructure to support its cloud-based deployments. Its technology partners also provide clients with vertical-specific competitive data for actionable insights.

Trend Analysis

- ◆ The B2B pricing application vendors are focusing on upgrading their solutions with recent AI/ML technological advancements, such as generative AI, to automate pricing tasks and make data-driven decisions. Vendors are partnering with Cloud Service Providers (CSPs) to support cloud-based deployments and adopt the Microservices-based, API-first, Cloud-native, and Headless (MACH) framework. Organizations are implementing B2B pricing solutions for dynamically adjusting their prices due to various factors, such as inflation, and focusing on value-based and sustainable pricing to drive sales. Vendors aim to improve system consumerization by making continuous upgrades to their user interface to enhance users' experience.
- ◆ Price Edge partners with CSPs to support its cloud-based deployments and provide users with improved flexibility, scalability, and security. The company aims to incorporate generative AI for various tasks, such as sending price list revision letters, obtaining quick competitive insights, and reporting and improving search and support experiences. The company plans to continuously upgrade its user interface for better UX. The company plans to develop a supplier portal for suppliers to update their prices, enabling users to dynamically adjust prices and publish price lists across channels.

Final Take

- ◆ Price Edge offers a flexible SaaS-based pricing platform to help organizations implement price management calculations, manage price lists and rebates, and leverage AI/ML algorithms to provide optimal price recommendations that maximize revenue. The platform also helps organizations simulate various pricing scenarios to assess their impact on KPIs. The platform assists organizations in identifying price improvement opportunities using advanced analytics and allows users to create omnichannel pricing strategies to ensure consistent pricing across all channels.
- ◆ Users seeking a B2B pricing vendor that has a robust presence in EMEA primarily caters to large and enterprise-level clients with a robust focus on mid-market companies and offers robust core pricing capabilities while offering multiple use cases across industry verticals, specifically the distribution sector, could select Price Edge's platform.

Pricefx

URL: <http://www.pricefx.com>

Pricefx, founded in 2011 and headquartered in Pfaffenhofen, Germany, is a price optimization and management company, operating in the software development industry. The company is a provider of cloud-based AI-driven price management and optimization platform for B2B and B2C organizations. The platform enables organizations to optimize their pricing strategies and improve price execution across all channels, improving revenue and margins.

Pricefx's platform leverages AI/ML to assist B2B organizations, specifically in the manufacturing, distribution, and process industries, in managing and optimizing their complex pricing and sales processes. The platform offers robust B2B pricing capabilities, including price analytics, price benchmarking, price management, price simulation, agreement management, rebate management, channel management, and quote management.

Analyst Perspective

Key Differentiators

- ◆ Pricefx offers the Plasma tool, an industry-level benchmarking tool that enables organizations to compare their performance against peers. The tool enables users to compare their pricing performance with industry standards using KPIs, such as price waterfall structure, deal velocity, and price increases. The tools help organizations aggregate and anonymize data from various industries to provide benchmarks. This assists in identifying market trends and enhances pricing strategies and execution by providing detailed insights and benchmarks.
- ◆ Pricefx's deal management capability facilitates organizations to create, maintain, and monitor customer-specific agreements to streamline the management of sales agreements, such as volume discounts, competitor discounts, and special pricing. The

capability allows users to set price policies and discounting rules to manage the lifecycle of customer-specific agreements. The capability supports automated workflows to streamline the deal approval process and ensure agreements are approved based on pre-defined rules.

- ◆ Pricefx leverages generative AI capabilities to identify patterns in data, automate insights, create watchers for alerts and notifications, and help prioritize actions across various use cases. The company provides accelerators for optimization use cases, such as negotiation guidance, list price optimization, and forecasting and simulation. The company also offers accelerators for industry use cases, such as customer agreements, formula pricing, workflows, and collaboration. This enables faster implementation and accelerates time-to-value, facilitating organizations to quickly realize benefits and improve their return on investment.

Product Strategy

- ◆ **Technology Roadmap:** Pricefx's comprehensive technology roadmap focuses on making continuous innovation and strengthening the platform's functionalities to provide better value to its customers. The roadmap emphasizes self-service capabilities by supporting UI-based configurations to help users seamlessly configure and manage pricing strategies, agreements, and actionable insights. The roadmap aims to strengthen the platform's adaptability by integrating with SAP applications and supporting rebate integration to ensure seamless integrations.
- ◆ **Strategic Roadmap:** Pricefx prioritizes the continuous enhancement of its platform's capabilities to support extended use cases and align with evolving client needs and market trends. The company aims to make ongoing upgrades to its user interfaces to make them more intuitive for users and improve their overall experience. The company also focuses on continuously offering out-of-the-box industry-specific accelerators and integration templates to help clients extend the platform's functionalities and achieve faster time-to-value.

Customer Success Strategy

- ◆ Pricefx supports cloud-based deployments and follows a subscription-based pricing approach. The pricing model depends upon the business requirements and includes various parameters, such as actual usage, use cases, and others for licensing.
- ◆ Pricefx focuses on building a robust partnership ecosystem and has a wide range of strategy partners to advise its clients on business and pricing strategies. The company also partners with System Integrators (SIs) and Independent Software Vendors (ISVs). These partnerships help Pricefx assist its clients with end-to-end implementation and provide them with better value. The company's SI partners help integrate the Pricefx platform with clients' various existing systems and applications. The company's ISVs offer pre-built connectors and add-ons to the Pricefx platform to deliver an integrated to its clients.

Market Strategy

- ◆ **Geo-expansion Strategy:** Pricefx has a strong geographical presence across EMEA, followed by North America and Asia Pacific. The company continues to focus on growing its footprint in EMEA and North America by acquiring new customers and increasing its market share.
- ◆ **Industry Presence:** Pricefx serves customers across sectors, including manufacturing, distribution, and process industries. The company focuses on industrial, automotive, building products, and high-tech segments in the manufacturing and distribution sectors. The company focuses on chemicals and lubricants segments in the process industry vertical.
- ◆ **Use Case Support:** Pricefx's platform supports various use cases, such as quoting, segmenting customers based on similar attributes, optimizing prices across the price waterfall using AI, managing list prices, rebates, contracts, and promotions, and supporting pricing analytics to deliver actionable insights to users.

Trend Analysis

- ◆ The B2B pricing application vendors are focusing on upgrading their solutions with recent AI/ML technological advancements, such as generative AI, to automate pricing tasks and make data-driven decisions. Vendors are partnering with Cloud Service Providers (CSPs) to support cloud-based deployments and adopt the Microservices-based, API-first, Cloud-native, and Headless (MACH) framework. Organizations are implementing B2B pricing solutions for dynamically adjusting their prices due to various factors, such as inflation, and focusing on value-based and sustainable pricing to drive sales. There is also a growing need to integrate these solutions with Configure-Price-Quote (CPQ) applications and incorporate sales intelligence, rebate management, and deal management capabilities to help organizations streamline their end-to-end sales processes. Vendors aim to improve system consumerization by making continuous upgrades to their user interface to enhance users' experience.
- ◆ Pricefx adopts cloud-native architecture to enhance the scalability, flexibility, and security of its platform. The company's platform leverages generative AI for actionable insights, as well as improved search and analytics capabilities. The platform incorporates various factors to support dynamic and tailored pricing that maximizes margins. The company provides CPQ, deal management, and sales intelligence capabilities to help organizations streamline their quote-to-cash process. The company also partners with Enable to support complex rebate management.

Final Take

- ◆ Pricefx's configurable and SaaS-based platform supports organizations with the end-to-end price management closed-loop cycle. This includes offering comprehensive pricing capabilities for creating pricing strategy, managing and optimizing prices across the waterfall, executing prices, and tracking price performance across channels in real-time. The platform also offers sales capabilities, such as cross-selling, upselling, negotiated price guidance, quoting, and agreement management, to streamline the sales process and help organizations improve margins.

- ◆ Users seeking a B2B pricing vendor that provides a self-service, user-friendly platform focusing on the white-box approach to pricing with comprehensive pricing and sales capabilities, supports the flexibility to help users tailor the platform as per their requirements, offers industry accelerators and integration templates for quick implementation, and has a strategic partnership with SAP and Salesforce for extended use cases while offering multiple use cases across industry verticals could select Pricefx's platform.

Pricemoov

URL: <http://www.pricemoov.com>

Established in 2016 and headquartered in Paris, France, Pricemoov is a price management company. Pricemoov operates in the software development industry and is a provider of cloud-based price management and optimization platform for B2C and B2B organizations. The platform helps organizations improve their sales, adapt to market dynamics, and make informed pricing decisions.

The company's pricing platform supports end-to-end pricing capabilities, enabling organizations to seamlessly manage and optimize their prices leveraging automation and advanced analytics. The platform offers robust B2B pricing capabilities, that include data centralization, price delivery, monitoring and analytics, collaboration workflows, price management, price optimization, and price negotiation.

Analyst Perspective

Key Differentiator

Pricemoov's price negotiation capability helps organizations centralize and track customer price agreements and quotes to streamline deal management. The capability allows users to configure price guidelines for specific customer segments to ensure consistency and maximize margin. The capability also provides the sales team with real-time contextual insights to negotiate and personalize quotes for customers to increase conversions. Furthermore, it supports automated approvals and collaborative workflows to reduce time-to-quote and increase the efficiency of the deal approval process.

Product Strategy

- ◆ **Strategic Roadmap:** Pricemoov aims to continue its focus on sustainable pricing practices to ensure compliance with regulations and satisfy eco-conscious consumers to increase sales and drive customer engagement, trust, and loyalty. The company

plans to help organizations adopt sustainable pricing strategies by allowing them to dynamically monitor and adjust prices using its platform to ensure alignment with evolving market dynamics and business objectives. Further, the company plans to make ongoing improvements to extend the capabilities of its platform for ensuring organizations' alignment with long-term sustainability and profitability.

Market Strategy

- ◆ **Geo-expansion Strategy:** Pricemoov has a strong geographical presence across the EMEA region.
- ◆ **Industry Presence:** Pricemoov serves customers across the retail and distribution sectors.
- ◆ **Use Case Support:** Pricemoov's platform supports various use cases, such as implementing dynamic pricing, supporting automatic price updates, monitoring price changes, omnichannel pricing, managing price lists, optimizing prices for items in the catalog, and negotiating deals.

Customer Success Strategy

- ◆ Pricemoov focuses on building a robust partnership ecosystem and has a wide range of technology, consulting, and integration partners. Pricemoov leverages its partner network for quick implementation and improving the time-to-value for its clients. The company also partners with data providers to ensure its clients gain access to accurate external data required to set optimal prices.

Trend Analysis

- ◆ The B2B pricing application vendors are focusing on upgrading their solutions with recent AI/ML technological advancements, such as generative AI to automate pricing tasks and make data-driven decisions. The vendors are partnering with Cloud Service Providers (CSPs) to support cloud-based deployments and adopt the Microservices-based, API-first, Cloud-native, and Headless (MACH) framework. Organizations are

implementing B2B pricing solutions for dynamically adjusting their prices owing to various factors, such as inflation, and focusing on value-based and sustainable pricing to drive sales. There is also a growing need to integrate these solutions with Configure-Price-Quote (CPQ) applications and incorporate sales intelligence, rebate management, and deal management capabilities to help organizations streamline their end-to-end sales processes. Additionally, the vendors are aiming to improve system consumerization by making continuous upgrades to their user interface to enhance the experience of users.

- ◆ In these spaces, Pricemoov offers a cloud-native pricing platform for improved scalability, flexibility, and increased security. The cloud-native architecture also enables faster time to market, allowing organizations to quickly respond to market changes. Additionally, Pricemoov focuses on sustainable pricing practices, supports platform integration with Configure-Price-Quote (CPQ) applications, and offers deal management capabilities to help organizations streamline their end-to-end sales process. The company also provides an intuitive user interface for improved efficiency and enhanced UX.

Final Take

- ◆ Pricemoov's flexible SaaS-based platform centralizes price management to provide organizations with a comprehensive view of pricing information for improved consistency, accuracy, and transparency. This enhances data quality and enables organizations to make better pricing decisions. The platform allows users to seamlessly create, set, and optimize pricing strategies to maximize their revenue. Additionally, the platform supports various pricing capabilities, including price setting, price execution, and performance management to simplify overall pricing and deliver users with real-time analytics and insights into price management.
- ◆ Users looking for a B2B pricing vendor that has a strong presence in the EMEA, and offers an intuitive platform with robust pricing capabilities while offering multiple use cases across retail and distribution industries could choose Pricemoov's platform.

PROS

URL: <https://pros.com>

PROS, founded in 1985 and headquartered in Texas, US, operates in the software development industry as a provider of cloud-based B2B and airline solutions through its PROS Platform for B2B and B2C organizations. The platform leverages AI and ML to provide real-time predictive insights that enable organizations to maximize revenue and improve margins.

The company offers Smart Price Optimization & Management (POM) and Smart Configure-Price-Quote (CPQ) solutions as part of its platform's B2B offering. The POM solution utilizes advanced analytics to help organizations create optimal pricing strategies and manage their prices across channels to maximize revenue and margin. The solution offers comprehensive B2B pricing capabilities, including dynamic price management; AI-driven price optimization; price simulation; quote management; agreement management; and analytics, dashboards, and reporting.

Analyst Perspective

Key Differentiators

- ◆ PROS offers a deal management capability that facilitates organizations in streamlining the management of sales agreements and contracts throughout their lifecycle. The capability enables users to seamlessly create, modify, renew, and extend sales agreements, allows them to configure terms and conditions, including price protection and provides real-time insights into agreement changes during the amendment and renewal processes. The capability also enables users to track agreements by providing visibility into consolidated and detailed views of agreements that facilitate management and analysis. It provides insights into deal pricing, such as waterfall charts and profitability ratings, to help the sales team analyze deals and review the impact of pricing decisions.

- ◆ PROS' platform leverages AI to analyze customer purchase behavior, including gap analysis, churn rate, and inconsistent buying patterns, to provide customers with personalized product recommendations for cross-selling and upselling. This helps the sales team increase deal sizes, improve conversions, and enhance their sales.
- ◆ PROS' quote management capability enables users to seamlessly create and manage quotes using flexible workflows. This capability supports automated approval workflows to reduce quote approval times and streamline the quoting process. The capability enables sales teams to manage and quote subscription-based products with specific terms and rate plans, delivering a seamless experience for both the sales team and the customer.

Product Strategy

- ◆ **Technology Roadmap:** PROS focuses on continuous innovation and maintains a robust technology roadmap to meet the growing needs of its customers. The company aims to support its comprehensive omnichannel pricing and selling capabilities by continuously incorporating advanced AI/ML technologies. This approach helps organizations adapt their pricing strategies to market dynamics and evolving trends. Leveraging AI capabilities helps users identify patterns and make informed decisions by analyzing price recommendations, actual prices, and market predictions over time. The company focuses on improving digital collaboration through its platform to ensure seamless and real-time communication between teams, thereby increasing productivity and enhancing decision-making. The company prioritizes self-service by making its platform intuitive for users, enabling them to personalize it according to their needs. The company aims for extensibility and ecosystem by supporting seamless integration with other systems and applications through APIs. The company offers various third-party apps to enhance the platform's functionality and provides clients with robust community support for sharing best practices.
- ◆ **Strategic Roadmap:** PROS focuses on continuously enhancing its platform's capabilities to support expanded use cases and align with evolving client needs and market trends. The company invests in significant upgrades to its user interfaces, enhancing readability and visual appeal and refining search flow for better navigation,

making the platform more intuitive for users. These improvements aim to enhance the overall user experience and increase efficiency. The company prioritizes ongoing customer support and training to help clients achieve faster time-to-value and fully leverage the platform's benefits.

Customer Success Strategy

- ◆ PROS supports cloud-based deployments and follows a subscription-based licensing model. The licensing structure offers different editions, including Essentials, Advantage, and Ultimate, each catering to support standard and additional capabilities depending upon the business requirement. The company provides data integration and professional services to assist clients with configuration.
- ◆ PROS is committed to building a robust partnership ecosystem to deliver enhanced value to its clients. The company partners with various technology and advisory companies and has partnerships with industry associates and system integrators to assist in the end-to-end implementation of its platform.

Market Strategy

- ◆ **Geo-expansion Strategy:** PROS has a strong geographical presence across EMEA, followed by North America and Asia Pacific.
- ◆ **Industry Presence:** PROS serves customers across industries, including airline, air cargo, automotive parts, chemicals, consumer goods, industrial distribution, energy, food and consumables, healthcare, industrial manufacturing, services, technology, and transportation and logistics.
- ◆ **Use Case Support:** PROS' platform supports various use cases, such as omnichannel pricing to provide a consistent pricing experience to customers, dynamically managing and optimizing global price lists, providing real-time price guidance to the sales team, configuring and quoting complex products to improve time-to-quote, and utilizing price analytics to help users identify price improvement opportunities for maximizing margins.

Trend Analysis

- ◆ B2B pricing application vendors are focusing on upgrading their solutions with recent AI/ML technological advancements, such as generative AI, to automate pricing tasks and make data-driven decisions. Vendors are partnering with Cloud Service Providers (CSPs) to support cloud-based deployments and adopt the Microservices-based, API-first, Cloud-native, and Headless (MACH) framework. Organizations are implementing B2B pricing solutions for dynamically adjusting their prices due to various factors, such as inflation, and focusing on value-based and sustainable pricing to drive sales. There is also a growing need to integrate these solutions with Configure-Price-Quote (CPQ) applications and incorporate sales intelligence, rebate management, and deal management capabilities to help organizations streamline their end-to-end sales processes. Vendors aim to improve system consumerization by making continuous upgrades to their user interface to enhance users' experience.
- ◆ PROS prioritizes offering a cloud-based platform with a flexible and scalable architecture to improve performance, reusability, and security. The platform incorporates various factors to support dynamic price recommendations for eCommerce channels, helping organizations maximize revenue. The company provides CPQ, deal management, and sales intelligence capabilities to help organizations streamline their quote-to-cash process. The company also partners with Enable to support complex rebate management. The company aims to continuously simplify its user interface to enhance the user experience and increase overall efficiency for users.

Final Take

- ◆ PROS' SaaS-based integrated platform offers end-to-end pricing capabilities that enable organizations to create and manage dynamic pricing strategies, delivering personalized prices across channels in real-time. The company's POM solution enables users to define pricing strategies, optimize prices across channels and regions, manage workflows for pricing approval processes, and provide analytics and actionable insights to maximize revenue and margin.

- ◆ Users seeking a B2B pricing vendor with a robust customer base across EMEA and North America, a flexible platform with a scalable architecture that allows users for customization, a robust partnership network, and comprehensive pricing capabilities with multiple use cases across industries could opt for PROS' platform.

SPOSEA

URL: <http://www.sposea.com>

SPOSEA, founded in 2015 and headquartered in Hoofddorp, Netherlands, operates in the software development industry as a price management company. The company provides cloud-based pricing solutions, primarily for B2B enterprises.

SPOSEA offers the BrightPrice suite, which encompasses various solutions delivered on the SAP Business Technology Platform (BTP). The BrightPrice suite includes BrightPrice Insights, BrightPrice Build, BrightPrice Rebate, BrightPrice Deal, and BrightPrice Foundation, which provides SAP integration. These solutions help organizations manage and optimize prices throughout the pricing cycle. They also leverage AI and ML to provide users with real-time insights that maximize revenue and improve margins. The solutions offer comprehensive B2B pricing capabilities, including price analytics, price list management, price optimization, price simulation, quote management, rebate management, and deal management.

Analyst Perspective

Key Differentiators

SPOSEA's BrightPrice Foundation solution seamlessly integrates with SAP's systems, such as SAP ECC and SAP S/4 HANA, providing core functionalities to various other solutions within the BrightPrice suite. The native integration with SAP enables a seamless exchange of data and functionality between the two systems, eliminating the need for manual data entry and complex interfaces.

BrightPrice Foundation solution supports workflows that ensure governance and approvals, enhancing collaboration, efficiency, and compliance. The solution facilitates mass price updates, enabling quick adjustments in response to cost changes to prevent margin leakages and maintain competitive pricing. The solution allows users to perform

impact analysis, providing comprehensive insights into the effects of price changes to support informed decision-making.

The BrightPrice Rebate solution offers advanced rebate management capabilities, enabling users to seamlessly create and manage customer rebates within the SAP S/4 HANA application. SPOSEA's Rebate solution supports multi-level governance approval workflows to ensure compliance with regulatory standards and streamline the approval process while enhancing collaboration. The solution also supports mass extension options and customizable features, enabling users to efficiently manage rebate contracts while ensuring governance and compliance. The solution includes built-in analytics capabilities and access to real-time financial reports, empowering users to track accruals, sales performance, and automated settlements.

SPOSEA's BrightPrice Deal solution provides real-time price guidance to the sales team, enabling them to create and manage customer-specific price lists, quotes, and agreements. The solution leverages deal management analytics, such as Deal Score, to provide users with insights into deal quality and the likelihood of closing the deal. This capability helps organizations secure optimal deals with customers and enhance their sales performance. The solution enables users to simulate various pricing scenarios and visualize their impact on KPIs, assisting them in assessing the effects of different strategies. It also provides an intuitive UI facilitating users to quickly create quotes to reduce time-to-quote and improve sales process efficiency.

Product Strategy

Technology Roadmap: SPOSEA focuses on ongoing innovations and maintains a robust technology roadmap to make technological enhancements and cater to the growing needs of its customers. The company continuously invests in advanced AI/ML technologies for various use-case scenarios. The company continues to strengthen its analytics capabilities across its suite of solutions for deeper insights and improved decision-making. The company plans to optimize the data modeling process of its solutions to support quick implementations. SPOSEA plans to further standardize integration with CRM applications and eCommerce platforms, enabling users to seamlessly integrate the solutions into their existing workflows.

Strategic Roadmap: SPOSEA focuses on selling its offerings to SAP customers. The company plans to provide SAP clients with pricing expertise, advanced technology, and configurable UI tailored to customer needs. The company focuses on providing ongoing customer support and training to ensure clients achieve faster time-to-value and maximize the platform's benefits.

Customer Success Strategy

- ◆ SPOSEA supports cloud-based deployments and utilizes a subscription-based approach licensing approach. The company follows a SaaS-managed service approach, which provides comprehensive services to clients, such as training, support, maintenance, upgrades, and additional services, including consulting and customization. This strategy enhances customer value and maximizes the benefits solutions provide.
- ◆ SPOSEA focuses on building a robust partnership ecosystem and has a wide range of technology and channel partners. The company's strategic technology partnership with SAP for Enterprise Resource Planning (ERP), Salesforce, and MS Dynamics for Customer Relationship Management (CRM) enables the delivery of integrated pricing solutions to clients. The company's channel partners include pricing consultancies that assist clients in the implementation process and help them achieve faster time-to-value.

Market Strategy

- ◆ **Geo-expansion Strategy:** SPOSEA has a robust geographical presence across EMEA, followed by North America and JAPAC. The company aims to continue expanding its footprint across EMEA and North America to increase its presence and gain market share.
- ◆ **Industry Presence:** SPOSEA serves customers across industries, including chemicals, building materials, oil and gas, industrial machinery, Consumer Packaged Goods (CPG) and retail, paper and packaging, automotive, food and beverage, high-

tech and electronics, mining and metals, and pharmaceuticals. The company plans to further strengthen its presence in the pharmaceuticals, CPG, and retail sectors.

- ◆ **Use Case Support:** SPOSEA's solutions support various use cases, such as implementing advanced pricing strategies to maximize margins, automating and governing prices across the pricing cycle to streamline the pricing process, determining cost changes, and adjusting prices in real-time in response to cost fluctuation to ensure optimal sales price.

Trend Analysis

- ◆ The B2B pricing solution vendors are focusing on upgrading their solutions with recent AI/ML technological advancements, such as generative AI, to automate pricing tasks and make data-driven decisions. Vendors are partnering with Cloud Service Providers (CSPs) to support cloud-based deployments and adopt the Microservices-based, API-first, Cloud-native, and Headless (MACH) framework. Organizations are implementing B2B pricing solutions for dynamically adjusting their prices due to various factors, such as inflation, and focusing on value-based and sustainable pricing to drive sales. There is also a growing need to integrate these solutions with Configure-Price-Quote (CPQ) solutions and incorporate sales intelligence, rebate management, and deal management capabilities to help organizations streamline their end-to-end sales processes. Vendors aim to improve system consumerization by making continuous upgrades to their user interface to enhance users' experience.
- ◆ SPOSEA leverages AI and ML algorithms to help users segment customers and create personalized pricing strategies for each micro-segment aimed at maximizing revenue and improving the customer experience. SPOSEA supports cloud-based deployments for improved performance, scalability, flexibility, and security. Its solutions incorporate various factors, such as cost price fluctuations, to support dynamic pricing. Owing to the rise of sustainable pricing, the company's partnership with SAP helps it utilize the HANA data model to analyze sustainability indicators and KPIs and incorporate sustainability factors into pricing decisions. The company offers quoting, deal management, and sales intelligence capabilities to help organizations streamline their quote-to-cash process.

Final Take

- ◆ SPOSEA's SaaS-based solutions support end-to-end pricing capabilities that assist organizations in creating and managing dynamic pricing strategies to deliver customer-centric prices across channels in real-time. The solutions help users automate and optimize pricing throughout the price waterfall and enable them to seamlessly manage quotes and rebates, as well as monitor price performance in real-time to improve efficiency, accuracy, and decision-making. The solutions support seamless integration with ERP and CRM solution providers to deliver unified pricing solutions to customers that help them maximize business growth and sales.
- ◆ Users seeking a B2B pricing vendor that has a core focus on pricing, a robust presence across EMEA and North America, typically caters to large and enterprise-level clients, offers a flexible platform with scalable architecture, enabling users to tailor it as per their requirements, provides various implementation services, and has a strategic partnership with SAP, Salesforce, and Microsoft to deliver comprehensive out-of-the-box pricing capabilities to customers while offering multiple use cases across industries could select SPOSEA's solutions.

Syncron

URL: <https://www.syncron.com>

Syncron, founded in 1999 and headquartered in Stockholm, Sweden, operates in the software development industry and is a provider of SaaS-based end-to-end AI-driven Service Lifecycle Management (SLM) solutions for B2B organizations operating in the aftermarket vertical. The company offers its solutions as part of its Connected Service Experience (CSX) Platform, helping organizations enhance the aftermarket service experience for customers while improving their revenue and margins.

The company offers various applications as part of its CSX Platform, including Parts Planning, Dealer Parts Planning, Price, Contract Price, Service Execution, Technician Enablement, and Warranty Management. Syncron's Price application enables aftermarket organizations to create and execute optimal price strategies. The application offers robust B2B pricing capabilities, including list price management, price optimization, price simulation, deal analytics, price analytics, rebate management, quote management, and customer feedback management.

Analyst Perspective

Key Differentiators

Syncron's Contract Price application helps organizations optimize the pricing of service contracts and product-as-a-service offerings, refining pricing strategies, minimizing costs, and increasing revenue. The application automates pricing for services, labor, parts, and expenses to ensure accuracy and consistency. It leverages AI and ML for comprehensive cost analysis, enabling users to predict costs associated with material and labor over the

lifecycle of contracts to set prices that ensure optimal margins. The application provides insights into contracts' risk probability through risk assessment. This enables organizations to set optimal prices while incorporating the risk factor.

Synchron's Price application provides an integrated, comprehensive customer feedback module that enables organizations to collect and analyze real-time customer feedback on pricing. This functionality helps organizations tailor pricing strategies in response to customer feedback and ensure prices align with market dynamics. It also helps organizations identify areas of pricing improvement based on feedback, enhancing customer satisfaction, and enabling informed pricing decisions that maximize margins.

Product Strategy

- ◆ **Strategic Roadmap:** Synchron focuses on continuously advancing its platform's capabilities for extended use cases and aligning with the evolving needs of its clients and market trends. The company makes significant upgrades to its user interfaces, improving readability, and visual design, and optimizing search functionality for smoother navigation, enhancing user-friendliness. These enhancements aim to enhance the overall user experience. The company also emphasizes sustainability, along with ongoing customer support and training, to help clients realize quicker time-to-value and leverage the platform's benefits.

Customer Success Strategy

- ◆ Synchron has a robust partnership ecosystem encompassing a wide range of strategic, consulting, technology, and integration partners. The company's strong partner network enhances value for customers, including manufacturers and distributors. Its strategic partnership facilitates collaboration with partners on product development and cross-promotional efforts, driving continuous innovation and expanded market reach. The company's consulting partners provide value-added services through tailored solutions, implementation support, and strategic guidance to its clients. The company's technology partnerships deliver comprehensive solutions to clients and enhance the platform's capabilities by offering complementary tools that seamlessly integrate with the Synchron platform. Partnerships with System Integrators (SIs) help

clients with seamless integration of the platform with their existing enterprise technology infrastructure and optimization of overall system performance.

Market Strategy

- ◆ **Geo-expansion Strategy:** Synchron has a robust geographical presence across EMEA, followed by North America and JAPAC.
- ◆ **Industry Presence:** Synchron serves customers across industries, including aerospace, agriculture, automotive, construction and mining, consumer goods, dealers and distributors, material handling equipment, power generation, production machinery, medical technology, and energy.
- ◆ **Use Case Support:** Synchron's platform supports various use cases, such as handling base prices and regional price lists, managing and optimizing rebates, segmenting customers to deliver tailored prices for different segments, and supporting dynamic pricing to adjust prices in real-time based on market dynamics.

Trend Analysis

- ◆ B2B pricing application vendors focus on upgrading their solutions with recent AI/ML technological advancements, such as generative AI, to automate pricing tasks and make data-driven decisions. Vendors partner with Cloud Service Providers (CSPs) to support cloud-based deployments and adopt the Microservices-based, API-first, Cloud-native, and Headless (MACH) framework. Organizations are implementing B2B pricing solutions for dynamically adjusting their prices due to various factors, such as inflation, and focusing on value-based and sustainable pricing to drive sales. There is also a growing need to integrate these solutions with Configure-Price-Quote (CPQ) applications and incorporate sales intelligence, rebate management, and deal management capabilities to help organizations streamline their end-to-end sales processes. Vendors aim to enhance system consumerization by continuously upgrading their user interfaces to enhance user experience.

- ◆ Synchron prioritizes offering a cloud-based platform that enhances performance, flexibility, scalability, and security. The platform incorporates market dynamics to support real-time pricing for complex parts, maximizing revenue. The company focuses on sustainability to ensure compliance with Environmental Social Governance (ESG) initiatives and satisfy eco-conscious customers. The company provides quote management capability and supports integration with Taction for additional CPQ capabilities to help organizations streamline their sales process.

Final Take

- ◆ Synchron's CSX Platform enables organizations to plan, price, and provide after-sales support to manufacturers, distributors, and suppliers, enhancing overall business performance. The platform offers real-time visibility into service operations and supports seamless integration with various applications to ensure up-to-date and synchronized information across systems for better decision-making. The company's price management application assists organizations in the aftermarket segment to automate and optimize pricing strategies that maximize margin. The application utilizes AI to identify pricing opportunities and help organizations make informed pricing decisions.
- ◆ Users seeking a B2B pricing vendor that has a presence across EMEA, North America, and JAPAC, offers core price management capabilities, has a robust partnership network and a strong focus on the aftermarket segment while offering multiple use cases across industries, could select Synchron's CSX Platform.

Vendavo

URL: <https://www.vendavo.com>

Vendavo, founded in 1998 and headquartered in Colorado, US, operates in the software development industry, providing SaaS-based pricing and sales solutions for B2B organizations. Its solutions leverage AI to assist organizations optimize revenue, increase sales, and drive business growth.

Vendavo offers various pricing and sales solutions, including Vendavo Pricepoint, Rebate & Channel Manager, Intelligent Configure-Price-Quote (CPQ), Enterprise Pricing Platform (EPP) Deal Manager, Sales Optimizer, Deal Optimizer, Profit Analyzer, and Margin Bridge Analyzer. The company's pricing solutions provide organizations with price insights while assisting with price planning and price execution. The company offers comprehensive B2B pricing capabilities, including price management, rebate management, quote management, deal management, sales intelligence, price optimization, price analytics, and price-volume-mix analysis.

Analyst Perspective

Key Differentiators

Vendavo's Sales Optimizer solution utilizes AI to provide personalized cross-sell recommendations, helping organizations increase deal size and boost sales. The solution provides users insights into additional revenue generated based on provided cross-sell recommendations. This enables users to measure the effectiveness of their sales strategies and identify further growth opportunities. The solution also enables users to provide feedback on each recommendation, improving the quality of recommendations.

The company's Margin Bridge Analyzer solution offers comprehensive price-volume-mix analysis capability, helping organizations measure and monitor the impact of complex changes in price, volumes, product mix, and other dynamic market factors, such as currency fluctuations, on the business. The solution enables users to simulate multiple

scenarios and analyze the effects of pricing strategies on revenue and margins. The solution empowers users to collaborate and provides insights into outperforming products, underperforming channels, and discounts. This helps users make informed decisions to improve performance and increase margins. The solution offers automated and customizable reports tailored for each user's role, delivering actionable insights into business performance.

Vendavo's Intelligent CPQ solution enables the sales team to seamlessly create accurate and optimal quotes for complex products, minimizing quote turnaround time and improving sales. The solution allows users to incorporate complex and customer-specific, negotiated pricing and discounts in quotes, increasing win rates and securing deals with customers. The solution supports automated approval workflows, reducing quote approval times and streamlining the quoting process.

Product Strategy

- ◆ **Technology Roadmap:** Vendavo emphasizes continuous innovation and has a robust technology roadmap to enhance its solutions to meet the evolving needs of customers. The company plans to introduce advanced tier pricing group capabilities in price agreements, enabling users to create tier groups for negotiated customer prices. Vendavo will introduce parent-child agreements, enabling administrators to define parent agreements and allowing sales users to inherit properties from the parent structure to manage child agreements. The company also aims to introduce draft price rule sets to help users visualize the impact of different rules, along with a query-based pricing rules feature to assist users in setting price rules for any items. The company prioritizes simplifying deal approvals by enabling users to approve deals through emails and plans to enhance report publication, facilitating users to view and modify email notifications prior to publication. The company also plans to develop a volume curves auto-tiering override feature, enabling users to override tier breaks created by auto-tiering clustering algorithms based on their requirements. The company aims to develop a new elasticity-based optimization algorithm that incorporates a win/loss ratio for price optimization.

- ◆ **Strategic Roadmap:** Vendavo prioritizes the continuous enhancement of its solutions' capabilities to support extended use cases and align with evolving client needs and market trends. The company plans to launch Action Advisor, which will help identify trends and opportunities, leverage AI to automate complex data analysis, and provide users with actionable recommendations to maximize profit. The company also continues to implement significant upgrades to its user interfaces across all solutions, aiming to improve overall user experience and efficiency.

Customer Success Strategy

- ◆ Vendavo focuses on building a robust partnership ecosystem featuring a wide range of consulting, technology, and integration partners. Vendavo's consulting partners assist clients in developing pricing and selling strategies to maximize revenue and achieve business growth. The company's integration partners assist with the implementation of its solutions. The company's technology partnership with Independent Software Vendors (ISVs) helps expand its capabilities and deliver comprehensive solutions across industries and business functions to clients.

Market Strategy

- ◆ **Geo-expansion Strategy:** Vendavo has a strong geographical presence across EMEA, followed by North America.
- ◆ **Industry Presence:** Vendavo serves customers across industries, including aerospace and defense, aftermarket, automotive, building products, chemicals, consumer products, food and beverage, healthcare and medical devices, heavy equipment, high-tech, industrial components, metals and mining, mill products, oil and gas, packaging, pharmaceutical distribution, transportation and logistics, and wholesale distribution.
- ◆ **Use Case Support:** Vendavo's solutions support various use cases, such as determining price improvement opportunities and risks, optimizing pricing strategies to enhance revenue, supporting value-based pricing strategies to satisfy customers, creating and managing segment-specific price lists across channels, and centralizing

pricing and discount management to improve consistency and streamline price management.

Trend Analysis

- ◆ B2B pricing application vendors are focusing on upgrading their solutions with recent AI/ML technological advancements, such as generative AI, to automate pricing tasks and facilitate data-driven decisions. Vendors are partnering with Cloud Service Providers (CSPs) to support cloud-based deployments and adopt a Microservices-based, API-first, Cloud-native, and Headless (MACH) framework. Organizations are implementing B2B pricing solutions to dynamically adjust prices in response to various factors, such as inflation, while focusing on value-based and sustainable pricing to drive sales. There is also a growing need to integrate these solutions with Configure-Price-Quote (CPQ) applications and to incorporate sales intelligence, rebate management, and deal management capabilities, helping organizations streamline their end-to-end sales processes. Vendors aim to improve system consumerization by continuously upgrading their user interfaces to enhance the user experience.
- ◆ Vendavo prioritizes offering a cloud-based platform to enhance performance, flexibility, scalability, and security. The company leverages AI across its solutions to support dynamic pricing, helping organizations enhance sales productivity and maximize their revenue. The company provides CPQ, deal management, and sales intelligence capabilities to assist organizations in streamlining their quote-to-cash process. The company also supports complex rebate management capabilities, enabling off-invoice incentives for customers to increase deal size and enhance customer engagement.

Final Take

- ◆ Vendavo's cloud-based solutions offer end-to-end pricing capabilities, such as robust analytics, to assess the impact of the market dynamics and determine actionable opportunities for margin improvement. The solutions offer deal-specific guidance based on volume and customer willingness to pay, optimizing pricing strategies, improving customer satisfaction, and increasing revenue. The solutions also support

deal negotiation to secure optimal terms and deals with customers. The company also offers sales intelligence capabilities for intelligent cross-selling and white-space guidance for sales.

- ◆ Users seeking a B2B pricing vendor with a robust presence across North America and EMEA, comprehensive pricing capabilities, a robust technology roadmap, and a growing partner network while offering multiple use cases across industries could opt for Vendavo's solutions.

Vistaar

URL: <https://www.vistaar.com>

Established in 2001 and headquartered in Parsippany, New Jersey, USA, Vistaar operates in the software development industry and is a provider of a cloud-based platform that enables B2B and B2C organizations to optimize their pricing, promotion, and rebate. The Vistaar Platform leverages AI/ML and automation to help organizations improve operational efficiency and achieve business growth.

The company offers various applications, as part of its platform, including SmartPricing, SmartQuote, SmartRebates, SmartPromotions, and SmartOptimizer, that support end-to-end pricing capabilities, enabling organizations to seamlessly manage and optimize their prices leveraging automation and advanced analytics. The company offers robust B2B pricing capabilities, that include price management, price optimization, quote management, deal management, and rebate management.

Analyst Perspective

Key Differentiators

Vistaar's SmartQuote application supports configurable and automated approval workflows to help organizations streamline the quoting and deal management processes. SmartQuote application enables users to configure complex products and services based on pre-defined rules and dependencies to improve the quoting process. The application provides real-time deal pricing guardrails with guided approval tracking based on pre-set parameters to support deal price optimization. The application also provides contextual deal analytics, peer group analytics, line and deal scoring for deal guidance and insights to improve sales performance, optimize pricing strategies, and enhance decision-making. Furthermore, the application helps users generate contract and quote documents and allows them to manage contract renewals and modifications with complete access to the audit trail of contract history.

Vistaar's SmartPrice application supports the attribute-based pricing feature to allow users to set prices based on specific product attributes. This enables organizations to differentiate their product based on items' unique features and provides customers with personalized and fair prices. Additionally, the feature facilitates organizations to create optimal pricing strategies that meet customer needs and maximize revenue for the business.

Product Strategy

- ◆ **Strategic Roadmap:** Vistaar's strategic roadmap focuses on incorporating advanced technologies such as AI/ML to automate and streamline price setting. The company plans to continuously introduce new features to extend the functionalities of its platform and meet evolving client needs and market trends. Additionally, the company intends to provide ongoing customer support and training to help clients achieve faster time-to-value and maximize the platform's benefits.

Market Strategy

- ◆ **Geo-expansion Strategy:** Vistaar has a presence across the EMEA, NA, and APAC regions.
- ◆ **Industry Presence:** Vistaar serves customers across various industries, including beverage alcohol, digital media, energy, industrial manufacturing, steel manufacturing, and retail. The company has a strong focus on the beverage industry.
- ◆ **Use Case Support:** Vistaar's platform supports various use cases, such as implementing value-based pricing, providing a centralized repository for pricing data to seamlessly manage prices, reducing quote turnaround times to increase win rates, standardizing price calculations to ensure consistent and accurate pricing across channels, identifying cross-sell and upsell opportunities, and supporting workflows for automated approvals.

Trend Analysis

- ◆ The B2B pricing application vendors are focusing on upgrading their solutions with recent AI/ML technological advancements, such as generative AI to automate pricing tasks and make data-driven decisions. The vendors are partnering with Cloud Service Providers (CSPs) to support cloud-based deployments and adopt the Microservices-based, API-first, Cloud-native, and Headless (MACH) framework. Organizations are implementing B2B pricing solutions for dynamically adjusting their prices owing to various factors, such as inflation, and focusing on value-based and sustainable pricing to drive sales. There is also a growing need to integrate these solutions with Configure-Price-Quote (CPQ) applications and incorporate sales intelligence, rebate management, and deal management capabilities to help organizations streamline their end-to-end sales processes. Additionally, the vendors are aiming to improve system consumerization by making continuous upgrades to their user interface to enhance the experience of users.
- ◆ In these spaces, Vistaar offers a cloud-based pricing platform for improved scalability, flexibility, and increased security. The platform incorporates various factors to support dynamic price recommendations that maximize revenue. Furthermore, the company provides SmartQuote for CPQ, deal management, and sales intelligence capabilities to help organizations streamline their quote-to-cash process.

Final Take

- ◆ Vistaar's flexible and SaaS-based platform supports the configuration of pricing rules, objectives, calculation logic, and workflows to ensure the platform meets users' business requirements. The platform supports seamless integration with existing and third-party systems and applications to streamline data flow, create a unified ecosystem, and enhance the decision-making process.
- ◆ Users looking for a B2B pricing vendor that has a customer base across EMEA, NA, and APAC, offers a flexible platform with scalable architecture enabling users to tailor it as per their requirements and provides comprehensive pricing capabilities while offering multiple use cases across various sectors, specifically beverage industry, could choose Vistaar's platform.

Zilliant

URL: <http://www.zilliant.com>

Founded in 1999 and headquartered in Texas, US, Zilliant is a provider of SaaS-based Configure-Price-Quote (CPQ), price management and optimization, and revenue intelligence solutions for B2B organizations. The company offers price optimization and management, deal management, and sales guidance solutions through the Zilliant IQ Platform. The platform supports AI/ML models that help users segment customers, recommend optimal prices, and dynamically adjust prices in response to market dynamics to maximize revenue and margin.

The solutions assist organizations in managing the prices of products and services throughout the pricing lifecycle. The solutions offer end-to-end pricing and sales capabilities that allow users to create pricing strategies, set value-based prices, manage prices in real-time, optimize prices across the price waterfall, and publish prices in the right channels at the right time while continuously monitoring pricing performance through robust analytics. The solutions provide comprehensive B2B pricing capabilities that include price planning, price management, price optimization, sales intelligence, quote management, deal management, price simulation, and price analytics.

Analyst Perspective

Key Differentiators

Zilliant's deal management capability helps users streamline the creation, management, and renewal of customer-specific price agreements by centralizing agreements, reducing margin leakage, and simplifying processes. The capability also offers configurable workflows and automated approvals to streamline the agreement approval processes. The capability offers pricing guidance and product recommendations that enable intelligent deal creation with integrated analytics and KPIs while ensuring seamless communication of price updates. It includes customizable action cards for sales users to simplify the management of renewals, price change requests, and rebate thresholds. Additionally, it

provides advanced filtering and security options, automated internal negotiations, and audit trails to provide transparency to the users and enhance efficiency throughout the process.

The sales intelligence capability provides actionable insights that help sales users maximize revenue and margin. The capability facilitates users to determine opportunities for cross-selling and upselling, recovering lost sales, and tracking customer contract compliance. It uses advanced analytics to identify at-risk customers and recommends products to help recover lost sales. Further, it enables users to prioritize actions that reduce customer churn, enhance sales, and sell off excess inventory.

The CPQ capabilities help organizations simplify the quoting process to reduce quote cycle time and improve customers' buying experience. The capability helps users generate accurate quotes for complex product configurations with price guidance and supports real-time pricing and dynamic cost estimations. It supports automated workflows and approvals, allowing users to manage approvals across any location to streamline sales processes. It also supports interactive 2D and 3D visualizations to simplify complex product configurations and manage discounts. These features allow users to eliminate misconfigurations, costing inaccuracies, and order errors to close deals faster and help increase revenue and deal size.

Product Strategy

Technology Roadmap: Zilliant's technology roadmap focuses on enhancing its dynamic pricing capabilities by incorporating advanced technologies like Robotic Process Automation (RPA) and ML. This incorporation includes testing, learning, and adapting supported by RPA and ML recommendations, which enables users to respond to pricing requests more quickly and efficiently. The company also plans to incorporate AI capabilities, such as Generative AI, throughout the pricing lifecycle. It aims to continuously streamline the price management process through Gen AI-generated insights and actionable recommendations. The company also plans to leverage Gen AI for ad-hoc analyses and custom visualizations. Additionally, the company continues to invest in creating deep, native integrations with SAP to enhance its pricing solutions' capabilities and provide seamless workflows and data exchange for businesses using SAP systems.

Strategic Roadmap: Zilliant's strategic roadmap focuses on continuously enhancing its platform's capabilities to support extended use cases and align with evolving client needs and market trends. Zilliant is focused on automating the entire pricing lifecycle aimed at seamlessly connecting every stage of the process, including price setting, management, optimization, execution, and delivery within a unified platform. This approach improves overall efficiency, reduces turnaround times, and provides users with deeper, data-driven insights. Further, the company prioritizes ongoing customer support and training to help clients achieve faster time-to-value and fully leverage the platform's benefits.

Customer Success Strategy

- ◆ Zilliant supports cloud-based deployments and follows a subscription-based pricing approach. The company offers expert services to assist enterprise clients with configuration and implementation tailored to their specific requirements.
- ◆ Zilliant's robust partnership ecosystem includes a wide range of technology and channel partners. This partner network helps Zilliant enhance its offerings, offer complementary features, and provide better value to the clients. Its technology partners include SAP, which provides integrations for pricing, products, variant configuration, and sales solution configuration, while Salesforce contributes to the product catalog, Customer Relationship Management (CRM), and infrastructure capabilities. Regarding channel partnership, Zilliant has partnered with SAP on industry, geography, and product group Go-To-Market (GTM) and sales relationships. Additionally, Zilliant partners with various pricing and advisory firms to further extend its expertise and assist clients in the implementation, helping them achieve faster time-to-value.

Market Strategy

- ◆ **Geo-expansion Strategy:** Zilliant has a strong geographical presence across North America and the EMEA regions. The company also has a moderate presence in the LATAM region.

- ◆ **Industry Presence:** While Zilliant supports clients across multiple industries, it focuses strongly on the distribution and manufacturing sectors. Within the manufacturing and distribution sectors, Zilliant caters to customers across various segments, such as auto parts, food, electronics, industrial parts and equipment, electrical, building materials, specialty chemicals, and life sciences.
- ◆ **Use Case Support:** Zilliant's platform supports various use cases, such as managing a single source of pricing truth to minimize errors, automating pricing by streamlining workflows for price updates, discounts, and approvals, maximizing revenue and margin by optimizing prices across customer segments and offering analytics reports to help users gain actionable insights into pricing and determine price improvement opportunities in real-time to drive revenue. The platform also supports creating accurate and optimal quotes with guided selling and pricing guardrails to help users close deals faster and improve conversions.

Trend Analysis

- ◆ B2B pricing application vendors are focusing on upgrading their solutions with emerging technologies, such as generative AI, to automate pricing tasks and make data-driven decisions. Vendors are partnering with Cloud Service Providers (CSPs) to support cloud-based deployments and adopt the Microservices-based, API-first, Cloud-native, and Headless (MACH) framework. Organizations are implementing B2B pricing solutions for dynamic price adjustments due to various factors, such as inflation, and focusing on value-based and sustainable pricing to drive sales. There is also a growing need to integrate these solutions with Configure-Price-Quote (CPQ) applications and incorporate sales intelligence, rebate management, and deal management capabilities to help organizations streamline their end-to-end sales processes. Vendors aim to improve system consumerization by making continuous upgrades to their user interface to enhance users' experience.
- ◆ Zilliant aims to continuously incorporate AI capabilities to provide users with actionable insights and recommend data-driven actions, facilitating faster decision-making and enabling quick time-to-value implementation. The company also aims to leverage AI to address specific needs and support multiple use cases throughout the pricing lifecycle.

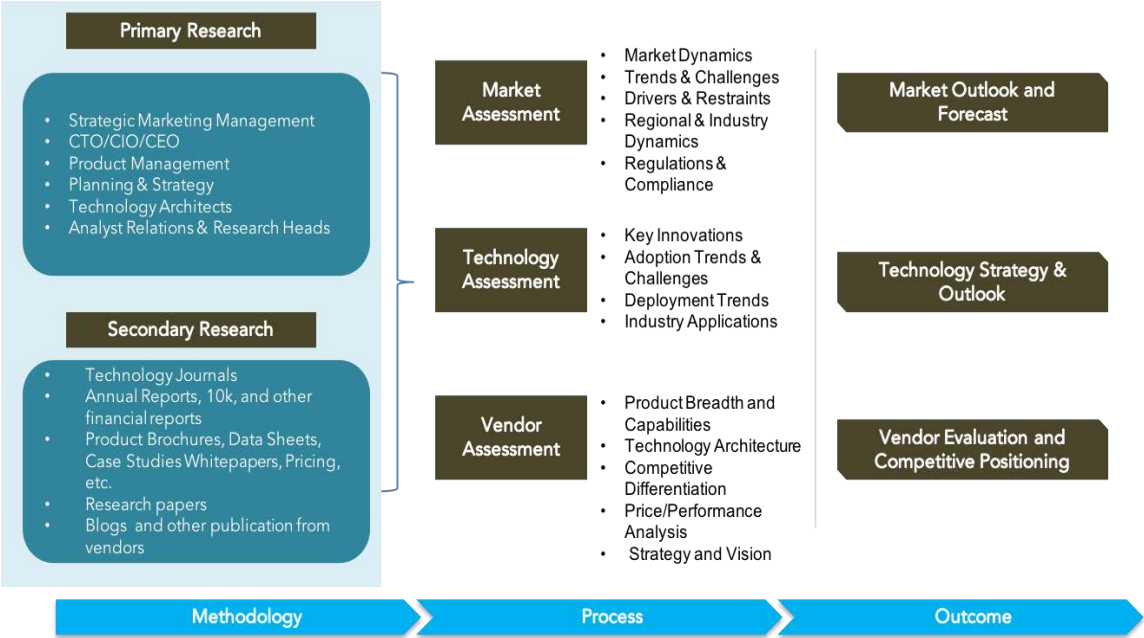
Zilliant utilizes a microservices-based architecture to improve the scalability, flexibility, and security of its platform. It incorporates various factors to support dynamic price recommendations, helping organizations improve revenue. Further, the company offers CPQ, deal management, and sales intelligence capabilities to help organizations streamline their quote-to-cash process. The company also partners with Enable to support the management of complex rebates.

Final Take

- ◆ Zilliant's SaaS-based platform, based on the MACH framework, helps organizations integrate data, execute complex rules and computations, configure AI/ML models, customize user interfaces, and analyze data. This enables users to make data-driven decisions that maximize revenue and margins. The company's pricing solutions enable organizations to simplify and automate pricing, minimize margin leakage, and deliver dynamic prices across channels. The solutions facilitate users to simulate various pricing strategies and evaluate their impact on the KPIs, allowing them to set optimal pricing strategies aligned with business objectives.
- ◆ Users seeking a B2B pricing vendor with a strong presence across North America offering a flexible platform with a scalable architecture, a robust product roadmap and partner network, and comprehensive pricing and sales capabilities with multiple use cases across various industry verticals, should consider Zilliant's platform.

Research Methodologies

QKS Group uses a comprehensive approach to conduct global market outlook research for various technologies. QKS Group’s research approach provides our analysts with the most effective framework to identify market and technology trends and helps in formulating meaningful growth strategies for our clients. All the sections of our research report are prepared with a considerable amount of time and thought process before moving on to the next step. Following is a brief description of the major sections of our research methodologies.



Secondary Research

The following are the major sources of information for conducting secondary research:

QKS Group’s Internal Database

QKS Group maintains a proprietary database in several technology marketplaces. This database provides our analyst with an adequate foundation to kick-start the research project. This database includes information from the following sources:

- ◆ Annual reports and other financial reports

- ◆ Industry participant lists
- ◆ Published secondary data on companies and their products.
- ◆ Major market and technology trends

Literature Research

QKS Group leverages several magazine subscriptions and other publications that cover a wide range of subjects related to technology research. We also use the extensive library of directories and Journals on various technology domains. Our analysts use blog posts, whitepapers, case studies, and other literature published by major technology vendors, online experts, and industry news publications.

Inputs from Industry Participants

QKS Group analysts collect relevant documents such as whitepapers, brochures, case studies, price lists, datasheets, and other reports from all major industry participants.

Primary Research

QKS Group analysts use a two-step process for conducting primary research that helps us capture meaningful and accurate market information. Below is the two-step process of our primary research:

Market Estimation: Based on the top-down and bottom-up approach, our analyst analyses all industry participants to estimate their business in the technology market for various market segments. We also seek information and verification of client business performance as part of our primary research interviews or through a detailed market questionnaire. The QKS Group research team conducts a detailed analysis of the comments and inputs provided by the industry participants.

Client Interview: The QKS Group analyst team conducts a detailed telephonic interview of all major industry participants to get their perspectives on the current and future market dynamics. Our analyst also gets their first-hand experience with the vendor's product demo to understand their technology capabilities, user experience, product features, and other aspects. Based on the requirements, QKS Group analysts interview more than one person from each of the market participants to verify the accuracy of the information provided. We typically engage with client personnel in one of the following functions:

- ◆ Strategic Marketing Management
- ◆ Product Management
- ◆ Product Planning
- ◆ Planning and Strategy

Feedback from Channel Partners and End Users

QKS Group research team researches with various sales channel partners, including distributors, system integrators, and consultants, to understand the detailed perspective of the market. Our analysts also get feedback from end-users from multiple industries and geographical regions to understand key issues, technology trends, and supplier capabilities in the technology market.

SPARK Matrix:

Strategic Performance Assessment and Ranking

QKS Group SPARK Matrix provides a snapshot of the market positioning of the key market participants. SPARK Matrix representation provides a visual representation of market participants and provides strategic insights on how each supplier ranks in comparison to their competitors, concerning various performance parameters based on the category of technology excellence and customer impact.

Final Report Preparation

After the finalization of market analysis and forecasts, our analyst prepares the necessary graphs, charts, and tables to get further insights and preparation of the final research report. Our final research report includes information including market competitive analysis, major market and technology trends, vendor profiles, and others.