

pricing without panic

the definitive buying guide for B2B pricing software



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table of contents

executive summary	3
what pricing software means for you	5
what are the benefits of pricing software	8
what pricing software does	10
capabilities needed in a pricing solution	13
the power of pricing and CPQ working together	16
what to look for in a pricing software partner	19
ROI and business case development	22
implementation roadmap: from evaluation to adoption	25
what if we're not ready?	29
your next steps	32

executive summary

Pricing is the heartbeat of every B2B company, shaping revenue, margin, customer relationships, and competitive position. Yet in many organizations, this vital function is slow, risky, and reactive, fueling anxiety across the business. Commercial teams wrestle with data scattered across spreadsheets and disconnected systems, and a process that is painfully manual. Each delay erodes trust from finance, sales, leadership, and customers, turning what should be a driver of growth into a constant source of tension. In rapidly changing markets, these broken processes lead to missed opportunities, lost revenue, and shrinking margins.

B2B pricing software is designed for companies in distribution, manufacturing, and industrial services who manage complex pricing across many products, customers, and regions. These businesses have many types of prices to manage and coordinate. It's especially valuable for teams responsible for setting, analyzing, and executing pricing strategies in a landscape of volatility and economic uncertainty.

who benefits most

Business leaders and teams across Pricing, Sales, Finance, Revenue, and IT in manufacturing, distribution, and industrial sectors

3 pillars of pricing software

Price Management, Price Optimization, Price Analytics

top capabilities to look for

Centralized pricing, AI optimization, integration with ERP/CRM/CPQ, segmentation, guided selling

pricing + CPQ synergy

Combines real-time strategy and execution for faster, more profitable sales cycles

B2B companies ready to take pricing from reactive to strategic will find significant ROI in implementing the right platform—and this guide provides a roadmap to making that decision confidently.



**what pricing
software
means for you**

what pricing software means for you

for the cfo

As a CFO, your focus is profitability, predictability, and control. Pricing software gives you visibility into how pricing decisions impact the P&L in real time. Instead of relying on manual reports weeks after the fact, you can see where margin is leaking today—and stop it. A 1–2% improvement in margin translates directly into millions of dollars in profit, and automation ensures your controls are enforced consistently across all regions and channels. With scenario modeling, you can pressure-test strategies before rollout, ensuring financial discipline while enabling growth.

for the cro / revenue leader

As a CRO, you need to hit growth targets without sacrificing profitability. Pricing software gives your sales organization competitive, data-backed guidance at the moment of quoting—helping reps win more deals, faster. Instead of second-guessing pricing, your team can rely on optimized start, target, and floor recommendations that boost win rates and protect margin. By reducing rogue discounting and shortening approval cycles, you'll also get more predictable revenue and cleaner forecasts.

for the head of sales / sales managers

As a Sales Leader, you want your reps to negotiate confidently and close faster. Pricing software eliminates the back-and-forth approvals that slow down deals by embedding guardrails and guidance directly into quoting tools. Your team always has access to the latest approved prices, and they know exactly how much room they have to negotiate—without risking margin erosion. This means stronger positions in front of customers, faster quotes, and more trust in the prices you deliver.

for the head of pricing / pricing team

As a Pricing Leader, you're tasked with balancing complexity, speed, and accuracy. Instead of being buried in spreadsheets, pricing software lets you centralize, automate, and optimize pricing strategy. You can run what-if scenarios to see how cost changes or new discount rules affect revenue and margin, then publish those prices across all systems instantly. AI-driven insights surface hidden margin opportunities and help you move from reactive number-crunching to being a strategic advisor to the business.

for it leaders

As an IT leader, you're responsible for ensuring that new solutions integrate seamlessly, scale effectively, and meet security standards. Pricing software is designed with IT in mind—featuring pre-built connectors to ERP, CRM, CPQ, and eCommerce platforms, along with open APIs for flexibility. It scales globally, supports multi-currency and multi-language operations, and is built with enterprise-grade security. By eliminating spreadsheet workarounds and manual uploads, you also reduce IT overhead while enabling the business to move faster.

key takeaway

pricing software delivers different value depending on your role—but across the board, it creates alignment, improves efficiency, and drives measurable financial results.

what are
the benefits
of pricing
software?

a breakdown of key benefits

Pricing software delivers both high-level strategic advantages and practical, everyday improvements across commercial teams.

faster speed-to-market

for price updates that match cost & market realities by eliminating bottlenecks in price setting and approval.

increased deal win rates

by equipping sales with data-driven price guidance and guardrails, leading to more competitive yet profitable offers.

greater customer retention and trust

by ensuring pricing consistency, fairness, and transparency across channels and regions.

enhanced competitive advantage

by turning pricing agility and precision into a differentiator in volatile or commoditized markets as digitally enabled pricing transformations help companies respond to shifts three to five times faster than peers.

scalable governance & compliance

that reduces regulatory and contractual risk while enabling disciplined discounting and escalation practices.

margin lift in multi-channel environments

by optimizing pricing across distributors, eCommerce, and direct sales with multi-channel pricing optimization delivering ~1.5% margin uplift.

improved forecast accuracy and revenue predictability

through better alignment of pricing with demand, cost drivers, and market conditions with mature pricing functions contributing 15–25% of total company profits.



what pricing software does

pricing software is typically categorized into three functional areas

Pricing software helps businesses manage, optimize, and execute pricing strategies more effectively across products, channels, regions, and customer segments. These capabilities are essential because pricing is one of the most powerful levers for improving revenue, profitability, and competitiveness. When pricing decisions are made manually or based on outdated data, companies risk leaving money on the table, misaligning with market dynamics, and slowing down sales.

1. price management

Price management software centralizes and automates pricing workflows, replacing spreadsheets and manual processes. This is important because manual pricing operations are error-prone and slow, often leading to inconsistencies across channels and delays in responding to market changes. By automating these processes, businesses can act quickly and confidently, ensuring accurate prices across systems.

benefits:

- Set and update price lists based on costs, discounts, regions, and business rules
- Publish approved prices directly to ERP, CRM, CPQ, and Sales Agreement systems
- Test pricing scenarios and simulate impact on margins or revenue
- Gain transparency into the pricing lifecycle and reduce errors

2. price optimization

Price optimization tools use AI and machine learning to recommend the best prices to achieve your business goals. It does this by extracting pricing intelligence from datasets available in the business such as order-line transactions. This function is critical for maximizing profitability while staying competitive. Businesses can't afford to guess the right price, especially when selling thousands of SKUs to multiple segments. Optimization ensures prices are backed by data and align with strategic goals.

benefits:

- Segment customers and products based on value drivers
- Run scenario models to forecast the impact of different pricing strategies
- Generate start, target, and floor prices to align with revenue or margin goals
- Deliver actionable pricing guidance with explainability and embedded analytics

3. pricing analytics

Modern pricing software often includes generative AI features that surface real-time insights and answer complex pricing questions in natural language. This is crucial for empowering pricing and commercial teams to uncover what's happening in the business and make faster, more informed decisions without relying on analysts or sifting through massive spreadsheets.

benefits:

- Surface key insights like margin leakage or demand shifts
- Allow users to ask questions in natural language and receive visual analytics
- Provide prebuilt reports and dashboards for pricing health and trends
- Enable real-time decision-making by reducing reliance on stale spreadsheets or slow data teams



**capabilities
needed in a
pricing solution**

the most essential capabilities and why they matter

When evaluating pricing software, B2B companies—especially those in distribution, manufacturing, or complex sales environments—should look for capabilities that drive scalability, precision, and speed across the entire pricing lifecycle.

1. centralized price management

Manage multiple price types in one place. This is key for organizations juggling regional, customer-specific, or channel-based pricing. Centralization ensures consistency, control, and faster updates.

2. scenario planning & simulation

Test “what-if” changes to see how pricing adjustments will impact revenue, volume, and margin. This reduces the risk of negative outcomes by allowing teams to pressure-test strategies before implementation.

3. AI-powered price optimization

Use machine learning to generate intelligent pricing recommendations—start, target, and floor—based on customer, product, and market data. This ensures that prices are not only competitive but strategically aligned to margin and revenue goals.

4. real-time pricing analytics & alerts

Monitor key performance indicators like pricing errors, margin leakage, and cost pass-through. Real-time visibility empowers proactive decision-making and faster course correction.

5. generative AI and natural language insights

Enable pricing and business teams to explore data by asking questions in everyday language and receiving visual, actionable answers. This democratizes access to insights and reduces reliance on data analysts.

6. ERP, CRM, and CPQ integration

Ensure prices flow seamlessly into ERP (e.g., SAP, Oracle), CRM (e.g., Salesforce), Ecommerce and CPQ platforms. This eliminates the need for manual uploads, reduces errors, and ensures sales and customers always have the latest prices.

7. sales enablement and pricing guardrails

Provide reps with inline pricing guidance and guardrails (e.g., color-coded discount alerts, required approvals). This improves sales execution and reduces rogue discounting without adding friction.

8. customer-specific pricing & sales agreements

Manage contract-specific pricing and account-based terms at scale. This ensures long-term agreements remain aligned with current pricing strategies and business rules.

9. segmentation & inference modeling

Leverage AI to create and manage customer/product segments based on behaviors, value drivers, or pricing sensitivity. Segmentation powers more tailored pricing strategies and improves pricing precision.

10. self-service and ecommerce readiness

Extend pricing logic into digital sales channels—portals, eCommerce sites, or partner tools. Customers can see accurate prices, request quotes, and complete purchases independently, reducing sales overhead and increasing scale.



**the power of
pricing and
CPQ working
together**

here's how the combination creates real business impact

Pricing and CPQ (Configure, Price, Quote) are most impactful when integrated. Together, they align pricing strategy with sales execution—enabling faster, more accurate quoting, protecting margins, and improving customer experiences.

1. seamless data flow

Pricing systems define list prices, discounts, customer-specific pricing, and AI-optimized guidance for every deal (e.g., start/target/floor). CPQ tools consume this data in real time, ensuring sales always works with the latest approved prices—no manual uploads or spreadsheets needed.

2. guided selling with guardrails

CPQ provides reps with embedded price guidance, real-time price health scoring (e.g., green/yellow/red), and discount thresholds. This prevents margin erosion and encourages pricing compliance—without adding friction to the quoting process.

3. optimized, personalized quotes

AI-powered pricing ensures quotes are tailored to customer segments, product types, and regions. CPQ applies these prices to configured products and bundles, creating deal-specific, data-backed proposals with market-aligned prices.

4. faster deal cycles

When reps can configure products, apply prices, and generate quotes in minutes—with minimal approvals—quote turnaround time drops dramatically. This leads to faster sales cycles, higher win rates, and greater responsiveness.

5. stronger margin control

Integrated pricing guardrails within CPQ workflows ensure deals don't fall below floor pricing. Sales can see the impact of discounting before applying it—avoiding “gut feel” decisions that leak profits.

6. scalable digital selling

CPQ systems power eCommerce portals and self-service tools. With pricing logic embedded, customers can configure products, see accurate prices, and submit quote requests independently—extending your pricing strategy across channels.

key business benefits of integrated pricing + cpq

benefit	description
Faster quoting	Guided workflows and real-time data eliminate manual steps and approvals
Higher price accuracy	Every quote reflects current pricing strategy and approved rules
Increased win rates	Personalized, competitive quotes improve sales effectiveness
Margin protection	Guardrails and floor pricing prevent excessive discounting
Greater sales adoption	Transparent, easy-to-follow pricing builds sales team confidence
Improved customer experience	Consistent, accurate pricing across touchpoints enhances trust and speed

what to look for in a pricing software partner

key criteria to consider when evaluating pricing software partners

Selecting the right pricing software isn't just about choosing the best technology—it's about choosing a partner who will support your organization's goals over time. While many vendors offer similar features on paper, the right partner will distinguish themselves through a combination of trust, expertise, and customer success commitment.

1. deep industry expertise

Look for vendors that understand the specific challenges of your sector—whether that's manufacturing, distribution, or another B2B vertical. Industry-savvy partners can provide use-case templates, best practices, and faster time to value.

2. proven track record

Review customer testimonials, case studies, and adoption metrics to ensure the vendor has a history of successful deployments with companies who have pricing challenges similar to yours. Longevity and client retention are strong indicators of reliability.

3. robust implementation & onboarding support

The best technology falls short if not properly implemented. Choose a partner that offers clear onboarding, training, and change management resources to set your teams up for success.

4. scalability and performance

Ensure the platform can grow with your business—across regions, business units, and product lines. Ask about performance benchmarks, multi-language and multi-currency capabilities, and support for large datasets.

5. transparent ai and analytics

It's important that any AI recommendations come with explainability and transparency. Your pricing teams should be able to understand and validate model outputs, not blindly trust a black box.

6. strong integration capabilities

Your pricing solution should integrate seamlessly with ERP, CRM, CPQ, and eCommerce platforms. Pre-built connectors and open APIs are crucial to eliminate data silos and reduce IT burden.

7. ongoing innovation and product roadmap

Select a partner that is investing in the future—through AI, self-service capabilities, and new feature development. Request visibility into their roadmap and how customer feedback shapes their evolution.

8. customer success and partnership mentality

Beyond the software, look for a partner that listens, adapts, and collaborates with your team. A dedicated customer success manager, regular business reviews, and a responsive support team are all critical signs of a true partnership.

Choosing the right pricing partner is a strategic decision that will shape your pricing agility and profitability for years to come. Take the time to assess not just the product, but the people and philosophy behind it. See this [Vendor Evaluation Checklist](#) for practical starting point.



ROI and business case development

ROI and business case development

Implementing pricing software is a strategic investment that requires a clear and compelling business case. The benefits are clear—higher margins, faster quoting, fewer errors—but executives expect measurable ROI before committing.

value levers

Pricing software drives profitability through several levers. Margin discipline reduces discount leakage, and even a one to two percent improvement can deliver millions in added profit. Data-driven pricing boosts win rates and market share. Sales productivity increases when approvals are automated and real-time guidance is embedded in the workflow. Operational efficiency rises as manual spreadsheets are replaced with automated processes. Consistent and transparent pricing strengthens customer trust and loyalty.

establishing the baseline

Building the case begins with understanding the current state. Key metrics such as gross margin, quote turnaround time, discount frequency, approval bottlenecks, margin leakage, and analyst hours spent on manual work provide the baseline for measuring improvement.

modeling the impact

With a baseline in place, the financial impact becomes clear. A \$500 million distributor that improves margin by just one percent generates \$5 million in additional profit. Automating workflows for a team of 10 analysts can free up 20 hours per week each, the equivalent of adding five full-time employees without increasing headcount. A two percent lift in win rates can yield tens of millions in new revenue.

factoring in costs

A credible business case must include all costs, including licensing, integration, training, and ongoing support. Transparent cost modeling ensures credibility and alignment with stakeholders.

building the case

The strongest cases highlight both quantified benefits and strategic impact. Executives should see a clear summary of opportunities, measurable improvements, a cost breakdown, and an ROI calculation. Most B2B companies achieve payback within 6 to 18 months. Beyond the numbers, pricing software delivers agility, tighter alignment across functions, and improved customer relationships.

key takeaway

ROI in pricing software is both financial and strategic. it provides measurable gains while enabling faster decisions, stronger sales confidence, and lasting customer trust. by presenting both dimensions, companies can secure executive approval and sustain long-term support for pricing transformation.



implementation roadmap: from evaluation to adoption

implementation roadmap: from evaluation to adoption

Adopting pricing software is a transformational initiative. While the benefits are clear—greater margin, faster quoting, and stronger alignment across teams—success depends on a thoughtful, structured approach. Below is a proven roadmap that B2B organizations can follow to ensure smooth implementation and maximize ROI.

1. assess current state

Before selecting a solution, companies should evaluate their existing pricing processes, systems, and pain points. This step includes:

- Identifying inefficiencies (spreadsheet dependency, manual approvals, rogue discounting)
- Gathering baseline KPIs such as average quote turnaround time, margin leakage, or frequency of price overrides
- Defining business objectives for a new solution (e.g., speed, accuracy, margin improvement)

Why it matters: Establishing a clear “before” picture helps build the business case and creates benchmarks to measure post-implementation success.

2. build the business case & secure alignment

Engage stakeholders from pricing, sales, finance, and IT to align on goals and requirements. Develop a business case that quantifies potential ROI (e.g., percentage margin improvement, revenue lift, cost-to-serve reduction).

Why it matters: Broad alignment ensures cross-functional buy-in and executive sponsorship—critical factors for adoption.

3. select the right partner

Evaluate vendors not just on features, but on industry expertise, scalability, integration capabilities, and customer success support.

Use a structured evaluation checklist to guide comparisons.

Why it matters: A strong partner provides more than software—they bring best practices, onboarding support, and ongoing innovation.

4. pilot & validate

Start with a defined scope—such as a single business unit, product line, or region. Use this pilot phase to test integrations, validate AI-driven pricing recommendations, and gather user feedback.

Why it matters: A pilot reduces risk, uncovers change management needs, and demonstrates quick wins that build momentum for broader rollout.

5. full rollout & integration

Expand to additional regions, business units, or channels once the pilot is successful. Focus on seamless integration with ERP, CRM, CPQ, and eCommerce platforms to ensure consistent pricing logic across the organization.

Why it matters: Scalable rollout ensures global consistency, eliminates manual workarounds, and equips sales teams with real-time, accurate guidance.

6. drive adoption & change management

Technology alone doesn't guarantee success. Establish a change management plan that includes:

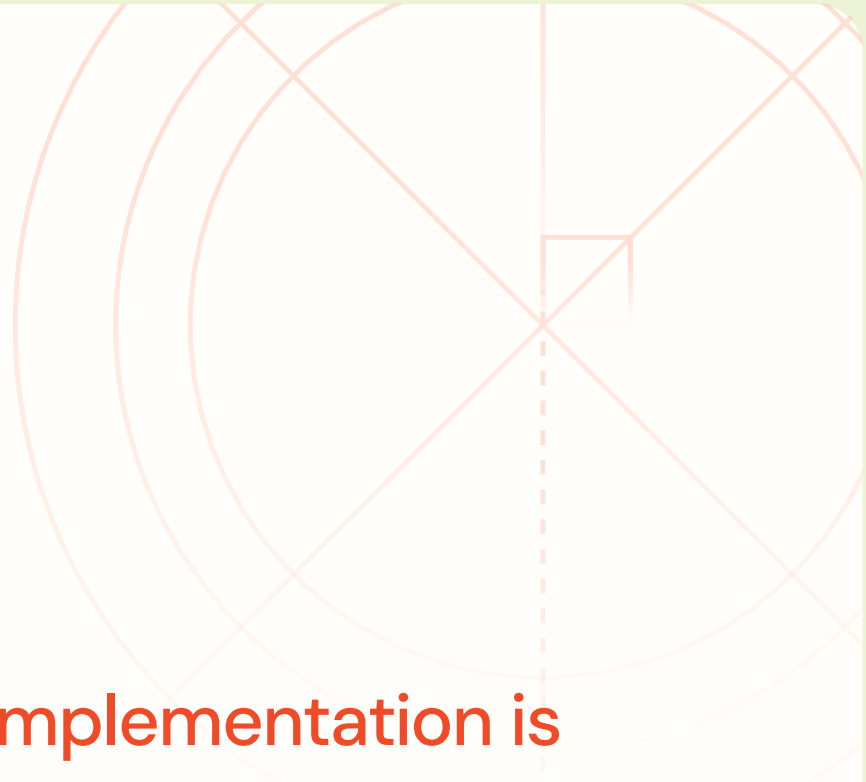
- Training sessions and enablement materials tailored for different roles (sales, pricing, finance)
- Communication of “what’s in it for me” to sales reps and managers
- Ongoing feedback loops to refine processes and address adoption challenges

Why it matters: Sustained adoption ensures the organization captures the full value of the investment.

7. measure, optimize & evolve

Track performance against the baseline KPIs established earlier. Monitor metrics like quote cycle time, margin improvement, win rates, and compliance with pricing guardrails. Use analytics and feedback to refine strategies and continuously evolve the solution.

Why it matters: Implementation is not a one-time project—it's an ongoing journey. Measuring and optimizing ensures long-term ROI and agility in changing markets.



key takeaway

a successful implementation is equal parts technology, people, and process. by following a structured roadmap, b2b organizations can move beyond manual, reactive pricing and transform pricing into a strategic growth driver.



what if we're
not ready?



what if we're not ready?

It's natural for organizations to hesitate before making a major investment in pricing software. Common concerns include data readiness, sales adoption, and integration complexity. The truth is, very few companies ever feel "100% ready." The good news: modern pricing solutions are designed to meet you where you are and help you build maturity step by step.

concern 1: "our data isn't clean enough."

Most companies start with fragmented or inconsistent data. Pricing software is built to work with the data you have today, such as order history, product hierarchies, and customer segments, and improve from there. Cleansing and enrichment can be done incrementally, and AI models can surface insights even in imperfect datasets. Waiting for "perfect data" delays benefits you could capture immediately.

concern 2: "our sales team won't adopt it."

Change management is always a challenge, but sales adoption improves when tools make their jobs easier. Pricing software integrates directly into quoting workflows (CPQ, CRM), providing guidance without extra steps. Instead of slowing reps down, it helps them quote faster and negotiate with more confidence. Early wins such as faster approvals and fewer pricing escalations help drive broader buy-in.

concern 3: “integration will be too complex.”

Modern platforms are designed for integration, with pre-built connectors to leading ERP, CRM, eCommerce and CPQ systems. Open APIs enable flexibility for custom environments. Many companies begin with a limited integration (e.g., ERP + pricing software) and expand later, reducing risk and accelerating time to value.

concern 4: “we don’t have the resources to implement this now.”

Implementation doesn’t have to be overwhelming. Many organizations start small with a pilot in one region, business unit, or product line before scaling across the enterprise. Vendors also provide onboarding, training, and customer success resources to share the workload. The result is quick wins that demonstrate ROI early and fund further expansion.

concern 5: “we can’t justify the cost right now.”

Pricing software typically pays for itself within 6–12 months. Even a small margin improvement (1–2%) can deliver millions in profit for mid- to large-scale B2B companies. When weighed against the cost of margin leakage, slow quoting, and missed revenue opportunities, the investment often looks small by comparison.

concern 6: “we can build pricing software ourselves.”

While building in-house may seem cost-effective, most companies underestimate the ongoing effort required to maintain, update, and scale a custom-built system. Internal tools often lack the AI, analytics depth, and continuous innovation that vendor solutions provide. Modern pricing software offers proven best practices, faster ROI, seamless integration, and ongoing enhancements, ensuring your organization stays competitive long-term without overburdening internal teams.



**your next
steps**

your next steps

In today's fast-moving B2B environment, pricing is no longer just a back-office function. It's a strategic growth driver. B2B pricing software transforms pricing from a source of anxiety into a source of speed, confidence, and precision, even amid inflation, complex agreements, and volatile markets.

You've seen how modern pricing solutions can replace manual processes, protect margins, and accelerate growth. The question now is simple: how will your organization take advantage?

here are three practical ways to move forward:



explore your potential

Run a quick pricing maturity assessment to see where hidden margin and efficiency gains may exist in your business



see it in action

Schedule a live demonstration to experience how AI-powered guidance, analytics, and CPQ integration work in real-world scenarios.



build your case

Partner with us on a tailored ROI analysis that quantifies the financial impact of enterprise pricing technology on your business.

Integrated end-to-end pricing solutions that combine price management, optimization, AI analytics, and CPQ bring powerful advantages: faster quoting, higher margins, reduced errors, and stronger alignment between pricing, sales, and finance.

The most successful B2B organizations don't just manage prices; they turn pricing into their power. With the right foundation in place, pricing becomes a lever for profitable growth, stronger customer retention, and resilience against economic volatility.



about zilliant

Zilliant eliminates Pricing Anxiety and transforms pricing into business power. Zilliant's Precision Pricing Platform automates and optimizes pricing operations with real-time intelligence, rallying your entire organization around a single source of truth to protect margins and drive growth. Learn more about how Zilliant helps businesses transform pricing from a source of anxiety to a source of power at zilliant.com.