

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

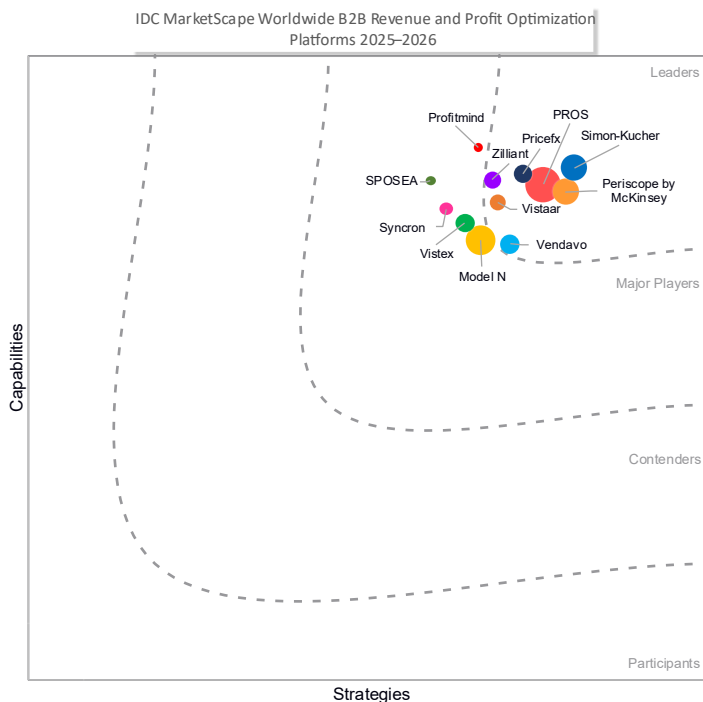
Tiffany McCormick

**THIS EXCERPT FEATURES PROS AS A LEADER**

## IDC MARKETSCAPE FIGURE

**FIGURE 1**

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



Source: IDC, 2025

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

## ABOUT THIS EXCERPT

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The content for this excerpt was taken directly from IDC MarketScape: Worldwide B2B Revenue and Profit Optimization Platforms 2025–2026 Vendor Assessment (Doc # US52034524)

## IDC OPINION

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

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

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

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

As pricing becomes a board-level growth lever, B2B enterprises face growing pressure to manage margin leakage, competitive volatility, and product complexity in real time. Customer feedback consistently highlights tangible business outcomes where their company dramatically improves the pricing process and the product more than pays for itself within three months. Customers reported that automated pricing systems have enabled them to process millions of price changes within a single year, protecting margins during volatile cost cycles that would have been unmanageable under manual

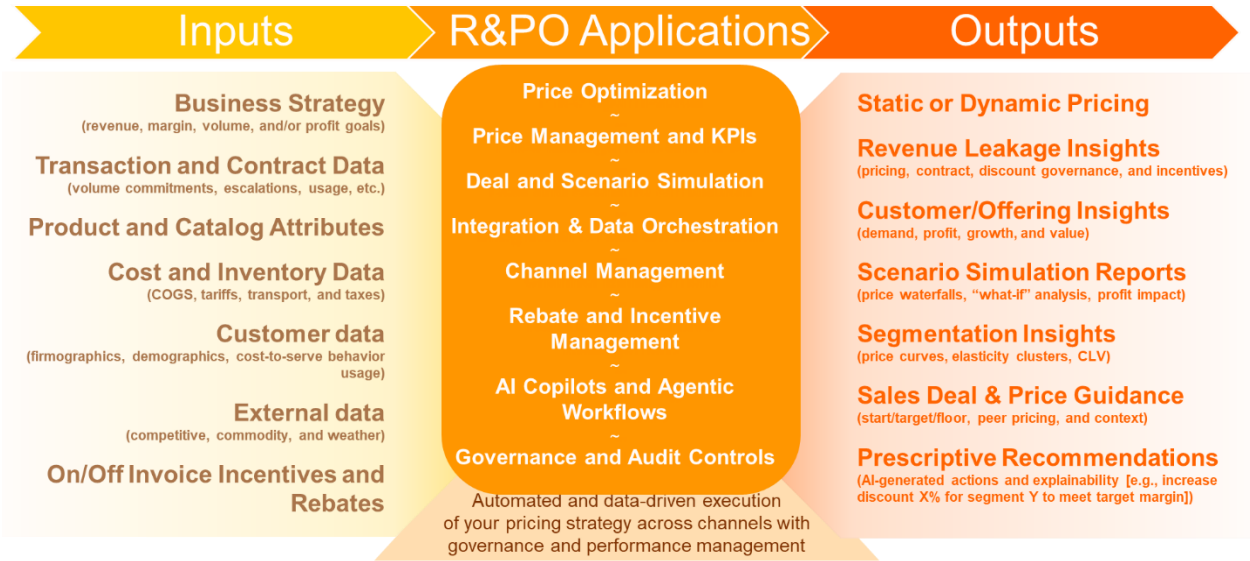
processes. Others cited measurable profit gains, such as several millions of dollars in incremental sales and profit, achieved within months of deployment. In complex deal environments, advanced analytics and dynamic scoring capabilities have provided visibility into discounting behaviors and opportunities that were previously invisible, resulting in stronger governance and improved gross profit realization. IDC's analysis highlights the following key trends shaping the market in 2025:

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

Figure 2 illustrates revenue and profit optimization applications.

**FIGURE 2**

**Revenue and Profit Optimization Applications**



Source: IDC, 2025

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

## IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

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

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

## ADVICE FOR TECHNOLOGY BUYERS

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

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

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

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

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

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

## VENDOR SUMMARY PROFILES

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

### PROS

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

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

Key attributes of the company are as follows:

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



## Strengths

- PROS offers a single unified platform that encompasses pricing, rebate management, CPQ, and subscription management. This horizontally integrated approach allows customers to manage the entire commercial life cycle, from pricing strategy and execution to rebate and contract management, without needing disparate systems or complex integrations. This breadth facilitates consistent pricing execution and synchronized workflows across teams.
- PROS employs neural networks and sophisticated AI models for price optimization, moving beyond traditional segmentation methods to enable transaction-specific pricing. Its platform incorporates AI not just for pricing but across all commercial workflows, including rebates and recommendations. PROS has also embedded generative AI and is advancing agentic AI workflows that autonomously optimize pricing decisions with transparency and explainability.
- The PROS real-time pricing engine delivers pricing recommendations with contractually guaranteed sub-300 millisecond response times, with support from enterprise-grade SLAs ensuring 99.99% uptime. This capability is critical for high-volume use cases, such as ecommerce and global digital commerce environments that demand instantaneous, accurate pricing. PROS also supports extensive data integration and scalability requirements, processing trillions of transactions annually worldwide.

## Challenges

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



(e.g., indices, weather, and competitor signals) should confirm connector availability, data contracts, and performance profiles at the outset to avoid custom work that could impact time to value.

## **Consider PROS When**

Consider PROS when you require real-time, explainable price optimization at enterprise scale (spanning negotiated sales and digital self-service) and you want pricing to operate as part of a unified commercial platform that also covers CPQ, rebates, and subscriptions. This fit is key for organizations seeking to modernize the full offer-to-price-to-order life cycle with audited performance characteristics, agent-assisted analytics, and governance suited to global B2B operations.

## **APPENDIX**

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### **Reading an IDC MarketScape Graph**

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

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

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

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

### **IDC MarketScape Methodology**

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately

vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

## Market Definition

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

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

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

### Related Research

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

### Synopsis

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

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

## ABOUT IDC

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International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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