Identify Where Technology Can Have the Biggest Impact for YOUR Organization

Using the Hierarchy or Revenue Needs™ and the Sales Stack Maturity Model

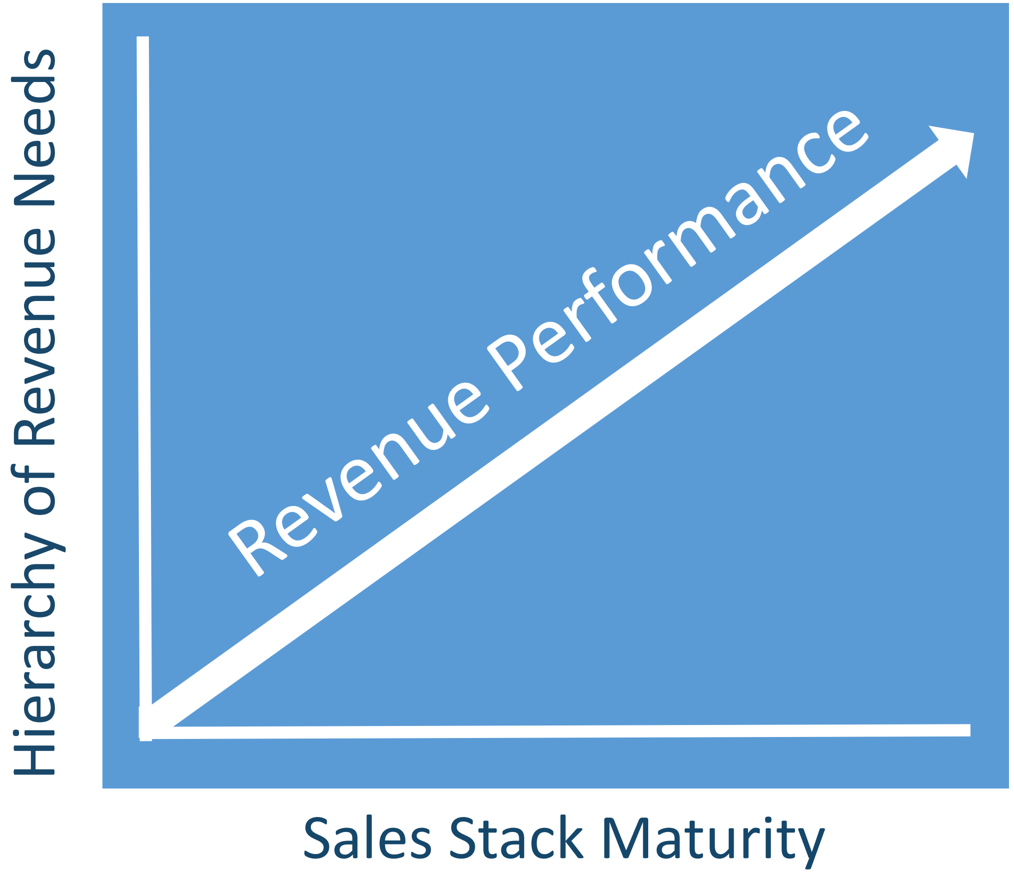
There are nearly 50 categories of sales tools and close to 1,000 solutions.

While there's no shortage of directory sites that catalog sales technology, there hasn't been a way—until now—to self-diagnose one's own organization and determine which solutions can help best.

Smart Selling Tools has created a framework to think through your own unique challenges, and then identify specific categories of solutions to fit those needs.

This guide offers specific steps for using the models so you can be on your way to a high performing organization using the perfect digital sales technologies for your company.

Building Your Sales Technology Stack



Technology matters only to the extent that it can help you improve revenue performance.

Sell More. In Less Time.

In the end, selling more in less time is precisely what technology should help a sales organization do.

Let’s get started

Follow These 3 Steps

Step One

Understand the Hierarchy of Revenue Needs

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The Hierarchy of Revenue Needs™

These are the basic needs required to increase revenue.

And where technology can help you **sell more** in **less time.**

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Step Two

Review the Needs for each Hierarchy level and circle those where improvement is needed

Who to Sell to

Do salespeople have the technology needed to discover opportunities in the market, prioritize selling effort, target all decision influencers, and maintain and grow your database?

Circle all items that are holding you back

1. Build prospect lists
2. Determine ideal customer profile based on success
3. Ensure high-level of lead follow-up
4. Facilitate outreach through social networks
5. Find email and phone contact data
6. Identify connections to prospects within your network
7. Increase call connect rates
8. Maintain and refresh database
9. Map buyer political landscape
10. Marry online inquiries to existing account records
11. Prioritize prospects for optimized activity
12. Respond to Leads quickly
13. Route Leads to the 'right' person
14. Score Leads and qualify them for sales
15. Test & verify email addresses in database

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When & How to Engage

Do salespeople have the technology to build interest and momentum, to get prospects to engage (get emails opened and calls accepted), to know what works and why?

Circle all items that are holding you back

1. A/B or other message testing for sales rep emails
2. Alert reps when sales steps or activities missed
3. Auto Dial on phone numbers
4. Automate email outreach
5. Build buyer Consensus
6. Coordinate meeting times and schedules
7. Create customized prospect or deal portals
8. Create email/call sequencing workflows
9. Create, Share, Customize email templates
10. Define the sales process & specific steps
11. Facilitate the online selection of content or products
12. Facilitate the sending of swag, or other marketing assets
13. Get email alerts/digests on key accounts & the market
14. Have instant online meetings
15. Know optimal number of touch points
16. Know what technology prospects use & when they change
17. Know when prospects engage
18. Know which content progresses deals
19. Log emails, tasks, and opportunities through email client
20. Nurture future opportunities
21. Present, show product catalog, and capture leads
22. Provide prospect-specific call scripts
23. Record live calls
24. Send email to a full list of prospects
25. Send video email messages
26. Share & Track Video demos
27. Understand prospects' business and challenges

Why Buy, Why From You

Do you have the technology to enable sales reps to use digital content and other materials to align the buyer's needs with the your solutions and to quantify and calculate ROI?

Circle all items that are holding you back

1. Align solutions with buyer challenges
2. Auto recommend relevant content to buyers
3. Auto recommend relevant content to salespeople
4. Build buyer consensus
5. Create customized prospect or deal portals
6. Easily send swag, or other marketing assets
7. Get alerts/digests on key accounts & market intelligence
8. Map buyer political landscape
9. Plan account-specific strategies
10. Quantify ROI and value
11. Share & Track Video demos
12. Understand prospects' business and challenges
13. Share, access & collaborate on a knowledgebase

How to Close the Deal

Do you have the technology to enable the sales rep to create contracts in real time, generate quotes, and capture signatures.

Circle all items that are holding you back

1. Collaborate on account activities & responsibilities
2. Configure quotes and proposals
3. Facilitate the online selection of content or products
4. Get contracts signed electronically
5. Identify referrals to help close deals
6. Plan account-specific strategies
7. Track and monitor changes in deal status (and causes)
8. Track contract workflow
9. Track signature statues

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What Else to Sell & How to Repeat

Do salespeople have the technology to nurture current customers for up-sell and cross-sell purposes? Do they have the ability to map the white-space for their solutions within target accounts. And, do they have the ability to track customer satisfaction and fulfillment to secure a renewal?

Circle all items that are holding you back

1. Configure proposals with complimentary systems and solutions
2. Create customized prospect or deal portals
3. Map account white-space
4. Measure customer satisfaction
5. Nurture future opportunities
6. Understand and monitor the delivery of purchased services

Sales Management, Analytics, Forecasting & Operations

Do you have the technology needed to roll-up the forecast quickly, dive deep into forecast movement, identify at-risk deals, coach the right people at the right time, and measure KPIs?

Circle all items that are holding you back

1. Analyze activities to auto-assess deal probability
2. Analyze territories and assign to reps
3. Analyze win/loss
4. Identify at-risk deals (and why)
5. Identify where reps are spending time
6. Judge forecasts on past and predictive analytics
7. Know optimal number of touch points
8. Know which content progresses deals
9. Monitor & analyze pipeline velocity & underlying factors
10. Quota planning, scenario analysis, & Administration
11. Roll-up the forecast
12. Track and monitor changes in deal status (and causes)
13. Track Sales rep activity metrics

Skills Development, Coaching, Onboarding & Reinforcement

Do you have the technology to automate skill-set assessment, record and share best practice skills, onboard new reps to full performance quickly?

Circle all items that are holding you back

1. Identify where reps are spending time
2. Motivate sales performance and reward behavior
3. Provide prospect-specific call scripts
4. Quiz on, and reinforce skill-set and knowledge
5. Role-play and feedback via video
6. Track and monitor changes in deal status (and causes)
7. Train salespeople on the use of internal sales technology

Step Three

Review the items you circled in step two. Determine which hierarchy level to focus on. See the Sales Stack Maturity Model for technology ideas.

Sales Tech Maturity Model

	White Belt	Blue Belt	Purple Belt	Brown Belt	Black Belt
Someone to Sell to	Internet Search • Lead Clipping • web forms	Sales Intelligence Clipping • web forms	Predictive Lead Scoring Marketing Automation	Data Cleanse & Append AI Lead Follow-up	Account-Based Selling & Marketing Predictive Analytics
A Way to Engage	Phone & Email (wing it) Online Meeting	Email Plugins Email Sequencing or Cadence Tools Dialers	Lead Management Buyer Engagement	Lead Management Email Pitch Live Pitch	Automated Demos Mobile Sales Enablement Customer Portals
Compelling Value	Generic PowerPoint	Presentation Tools	Buyer Engagement ROI Calculators	Account Management Guided Selling	Sales Enablement Value Visualization
Execute to Purchase	Spreadsheets Documents Email	eSignatures	Proposal Creation Pipeline Management & Deal Flow	Opportunity Management	CPQ Contract Management
Buy Again		CRM	Email Sequencing	Account Management	Account-Based Selling Renewal Management

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A Way to Engage	Phone & Email (wing it) Online Meeting	Email Plugins Email Dialers	Lead Management Buyer Engagement Sequencing or Cadence Tools	Lead Management Email Pitch Live Pitch	Automated Demos Mobile Sales Enablement Customer Portals
Compelling Value	Generic PowerPoint	Presentation Tools	Buyer Engagement ROI Calculators	Account Management Guided Selling	Sales Enablement Value Visualization
Execute to Purchase	Spreadsheets Documents Email	eSignatures	Proposal Creation Pipeline Management & Deal Flow	Opportunity Management	CPQ Contract Management
Buy Again	Nothing	CRM	Email Sequencing	Account Management	Account-Based Selling Renewal Management
Management, Admin Forecasting & Ops	Spreadsheets	CRM	Pipeline Management & Deal Flow	Sales Performance Mgt Sales Compensation Planning & Admin’	Forecast Analysis & Roll-Up (machine-learning) Territory Management
Skills Development, Measurement & Reinforcement	Nothing	CRM	Gamification	Sales Performance Mgt Coaching Tools	eLearning and Skills Development tools

List of Solution Categories

Account Based Marketing
Account Based Selling
Account Management, Strategy & Planning
Artificial Intelligence
Buyer Communication & Engagement
Cadence Tools (automated outreach sequencing)
Channel Partner Enablement
Coaching Tools
Contract Management
CPQ (Configuration, Pricing & Quoting)
CRM
Customer/Prospect Portals
Customer Success Management
Data Cleanse & Append

Dialers
Email Plugins (Templates, Tracking)
eSignature Tools
Forecast Analysis & Roll-up
Gamification
Guided Selling
Internet Lead Clipping
Lead Management
Lead Scoring and Routing
Marketing & Sales Alignment
Mobile Sales Enablement
Online Meeting
Opportunity Management
Pipeline Management & Deal Flow
Predictive Analytics
Prospect/Lead Prioritization
Presentation Tools

Proposal Creation & Sharing
Renewal Management
ROI Calculators
Sales Coaching
Sales Compensation, Planning & Admin.
Sales Enablement (content relevant to opportunity/stage)
Sales Follow-up
Sales Performance Management
Sales Intelligence (databases, lists, news & alerts)
Sales Playbooks
Skills Development, Measurement & Reinforcement
Territory Planning
Value Visualization Tools

Sample Solution Providers

Account Based Intelligence:	LeadGnome
Account Based Selling:	Altify, Membrain, Revegy,
Account Mgt, Strategy & Plan':	Altify
Artificial Intelligence:	Conversica, Companybook
Buyer Comm' & Engagement:	ClearSlide, LiveHive, Yesware
Cadence Tools:	LiveHive
Coaching Tools:	Qstream
Contract Management:	Apttus, CallidusCloud
CPQ (Config', Pricing & Quoting):	Apttus, CallidusCloud
CRM:	PipelineDeals, VanillaSoft
Customer/Prospect Portals:	Folloze, SKURA
Data Cleanse & Append:	Avention InsideView, RingLead
Dialers:	FrontSpin, VanillaSoft, Velocify
Email Plugins (Templates, Tracking):	LiveHive, Yesware, LeadGnome
eSignature Tools:	DocuSign
Forecast Analysis & Roll-up:	Clari
Gamification:	CallidusCloud, GamEffective
Guided Selling:	Highspot, SKURA, Seismic, RO|Innovation
Internet Lead Clipping:	LiveHive
Lead Management:	FrontSpin, VanillaSoft, Velocify
Mobile Sales Enablement:	App Data Room
Opportunity Management:	Altify, Membrain, Revegy,
Predictive Analytics:	SalesPredict
Sales Coaching:	Altify, Qstream
Sales Comp, Planning & Admin.	CallidusCloud
Sales Enablement:	HighSpot, KnowledgeTree, Seismic, SKURA, RO|Innovation
Sales Follow-up:	LiveHive
Sales Performance Management:	Altify, Membrain, Qstream, Revegy
Sales Intelligence:	Avention, DiscoverOrg, InsideView
Skills Development:	Qstream
Value Visualization Tools:	Alinean

Next Steps

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Each week I send out a 2-3 minute video on a different sales solution. You also get information on 3 additional solutions. You'll be an expert on which solutions are right for you in no time!

Join our weekly Sales Stack Strategy Webinar

What technology do others add to their sales stack and why? We'll answer these questions and more. In every 45 minute online session you'll hear about the lessons learned and the outcomes they experienced and see a demo of the solution.