GUIDE

The Buyer's Guide to Sales Enablement Platforms



Table of Contents

2 | Introduction

4 | Phase 1: Determine Your Readiness for a Sales Enablement Platform

6 | Phase 2: Build Your Team and Set Your Goals

7 | Phase 3: Research the Vendor Landscape

9 | Phase 4: Create a Shortlist of Vendors

10 | Phase 5: Issue a Formal RFP

12 | Phase 6: Build Your Business Case

14 | Conclusion

Introduction

Welcome, friend.

You've decided that it's time for your organization to take sales and marketing to the next level with the help of a sales enablement platform.

We've been waiting for you. And we're here to help.

A sales enablement solution is an important piece of any organization's technology stack. Not only does the platform improve alignment between Marketing and Sales, it has an enormous impact on operational efficiency, sales productivity, and most importantly—**revenue**. These results are achieved through improving content creation and accessibility, providing insights into content analytics, and bridging the gap between a CRM and Marketing Automation Platform for greater insight into the buyer's journey.

Organizations that have implemented a sales enablement solution have seen a **350% increase in content usage, 275% boost in conversions, and 65% more revenue generated by new reps**. Additionally, **Aberdeen has found** that organizations with a sales enablement platform experience a **13.7% annual increase in deal size**.

Because of the significant investment of budget, time, and resources required to successfully implement a sales enablement platform, it's critical to take a methodical approach to the process of buying and implementing this type of technology. Finding a vendor that is a partner to you throughout this process is crucial for ensuring success.

This sales enablement buyer's guide is designed to help you make sense of this process and will walk you through each step of purchasing a sales enablement platform—from research to the moment you sign on the dotted line.

The Process for Buying a Sales Enablement Platform



PHASE 1:

Determine Your Readiness for a Sales Enablement Platform

Timeline: 1 Week

Key Stakeholders: Marketing, Sales, Sales Enablement Team

Additional Resources: The Sales Enablement Readiness Checklist

Ostensibly, you've begun reading this guide because you've decided that it's time for your organization to purchase a sales enablement platform. But are you really sure? Like, 100% sure? Don't lie to me. We're all friends here.

It's important to be certain that you're ready, because a sales enablement platform is an incredibly powerful tool that will help you align teams, improve processes, and transform your organization. Additionally, thinking logically about your readiness for a platform allows you to properly prepare for steps that will happen throughout both the buying process and implementation.

Take the time to run through the **Sales Enablement Readiness Checklist**. This checklist will help you understand how your organization is currently doing when it comes to:

- Content Creation
- Content Personalization
- Content Findability
- Content Metrics
- Collaboration
- Knowledge of your Buyers

Remember, be honest with yourself as you go through the list. Your parents were right when they said that the only person you hurt when you lie is yourself. And, well, in this case you'd also hurt your organization. Taking an honest and thorough accounting of where your organization stands is incredibly important.

While going through the list, if you come across an item for which you don't know the answer don't just overlook it and move on. Take the time to seek out the person in your organization who is familiar with how that process works and get their opinion. Establishing open lines of communication early in the process with potential stakeholders is a great way to build trust and set up an inclusive environment.

After running through the checklist and determining whether or not your organization is ready for a solution (spoiler: you are), it's time to move onto surveying the wide and wonderful world of sales enablement platforms.



PHASE 2:

Build Your Team and Set Your Goals

Timeline: 1-2 Weeks

Key Stakeholders: Marketing, Sales, Operations

There's a part in every superhero movie or comic book where it's time to assemble the team. We've seen the origin story, the villain's dastardly scheme, and what's at stake (most likely the destruction of the Earth/universe). If you haven't figured it out by now, this is a convoluted metaphor to explain this phase of your sales enablement buying journey.

Sales enablement means a lot of different things to people. That's because of just how many things a sales enablement solution can offer. Some organizations are going to want the whole kit and caboodle right off the bat, while other organizations are going to take a different journey to unleashing the full potential of a platform. That's fine! Variety is the spice of life. But it's paramount to this process to have your goals clearly defined before getting too far along. If that happens, too many competing voices will end up overwhelming the project and sinking it before it even gets started.

"Sales enablement means a lot of different things to people. That's because of just how many things a sales enablement solution can offer."

To get started you need to assemble your crew that is going to help you get this project across the finish line. Much like any good superhero crew, you need to select a diverse set of people with a variety of backgrounds. Pull from Sales, Marketing, Operations, and any other department you think will be affected by this initiative. Meet with individuals to gauge their enthusiasm, hear their ideas, and lay out your case for why you think a sales enablement platform is necessary for your organization. Team sizes can vary greatly. You might find that only a couple of people are the right fit, or you could end up with a committee of individuals who are excited and motivated.

As part of the team building phase you should start to get a more concrete idea of what people are looking to gain from this project. With the team in place it's time to clearly define your goals before you head to the next phase.

As we previously mentioned, a sales enablement solution is an incredibly powerful tool. When setting your goals think about what you want to achieve. Does your organization need better sales communication? Is content management and distribution an issue? Do you need insight into content analytics and ROI? Would you like more visibility into the entirety of your buyer's journey? All of these are solvable with a sales enablement platform, but you need to decide what your organization will focus on solving.

Once you've selected your team and set your goals, it's time to move onto researching vendors.

PHASE 3:

Research the Vendor Landscape

Timeline: 1 Month

Key Stakeholders: Marketing, Sales, Sales Enablement, IT

Additional Resources: Analyst & 3rd Party Reports

Now comes the fun part. In this phase, it's time to research what the market offers and eventually decide on a partner who will set you up for success. Have you ever had dreams about what it would be like to be a big time athlete entering free agency? Can you imagine what it's like to be LeBron James and know that any team in the world would trip over themselves to give you everything you ever wanted? Well this phase is sort of like that. Minus the international fame, piles of cash, and personal sneaker line.

Really, they are similar. Because while you conduct your research, you will be weighing many different options while ultimately deciding on the fit that's best for you and your organization.



The best vendors will roll out the red carpet for you and offer you a clear picture of why your teams will succeed together. Research is a crucial step to determine what solutions exist, the difference between vendors, industry best practices, and understanding who are the leaders in the space.

This phase should be a team effort. Different stakeholders will have different requirements for the platform. Working closely with people from different departments will reveal important things to look for during the research process.

Finally, after performing your research, you will have a good idea of the market, the solutions on offer, and the differences between the platforms.

Below is a quick rundown of everything you should be completing in this phase:

- **UNDERSTAND THE MARKET:** Utilize analyst reports and third-party reviews of the solutions on the market. A sales enablement solution is a large investment and it's important to choose a platform that is capable of meeting all of your needs—now and in the future.
- **MEET WITH VENDORS:** After getting a solid understanding of who the major players in the space are you should begin reaching out to schedule some time with them. Again, every organization will be different in this regard. You may want to start off with a simple conversation, or you could head right into seeing a demo of the platform. Consult with your sales enablement team to decide the best plan of action.
- **SURVEY YOUR NETWORK:** Some of the best advice you can get is by speaking with your peers about their experiences with sales enablement platforms. Turn to those you trust in your network and ask them about their history with solutions, the results they've seen, and what vendors they suggest.

It's possible to say this about every phase, but research is truly one of the most important aspects of buying a sales enablement solution. Without knowing exactly what is on offer it's impossible to make the most informed decision. Take this step seriously and do your homework!

PHASE 4:

Create a Shortlist of Vendors

Timeline: 1 Month

Key Stakeholders: Marketing, Sales, Sales Enablement, IT, C-Level

Additional Resources: Analyst & 3rd Party Reports

With the research phase completed, it's time to take a look at all of your options and whittle away the solutions that won't fit your needs. As you conducted meetings and demos with vendors in the previous phase, a list of top contenders should have emerged.

Honest communication with the vendors you talk with during this stage is also important to keep in mind. Being open with your requirements, timeline, and budget will lead to fruitful discussions. In the end, you want to choose a vendor that will work with you as a partner and stick with you throughout the entire process of buying and implementation.



You can't overthink the process of creating your list of preferred vendors too much. Take into consideration how your sales enablement team will work with the vendor's implementation team, what aspects of the solution are meeting the needs of your goals outlined in phase 2, and how your organization will be placed in a position to succeed with a platform.

You don't just set and forget a sales enablement platform. It requires proactive management and you need a partner that will be there alongside you. Spend time with your sales enablement team to reach a consensus on the small handful of vendors you think meet your criteria. Then it's time to head to the next phase of diving even deeper into what sets these platforms apart.

PHASE 5:

Issue a Formal RFP

Timeline: 1-2 Months

Key Stakeholders: Procurement, Sales Enablement, InfoSec

Additional Resources: 72 Questions Your Sales Enablement RFP Should Ask

Having done your homework in the previous phase, it's time to set your requirements down in a formal document and issue an RFP to the vendors you have selected. Your sales enablement RFP should be designed to get a full understanding of the capabilities of the solutions you are considering. The questions you ask need to be thoughtful and considerate of the many parts of your organization that will be affected by a sales enablement solution.

A robust RFP will take many different aspects of a sales enablement vendor into consideration. Unless you've previously issued an RFP for a sales enablement solution, it's difficult to know where to start. And if you have issued an RFP before, well then what are you doing here? This isn't for you! Actually, wait, hang on. You probably have something to learn if you issued one previously and find yourself about to go through the process again.

Designing the right RFP is crucial for ensuring that you: **(a) gain a complete picture of a vendor's qualifications and the system's capabilities, and (b) can cover all of your bases to know that you have made the most informed choice possible.**

We recommend **following a template** to help you structure the RFP. Not every organization will have the same requirements as the next, but beginning with a detailed outline is important for being able to brainstorm other questions that are relevant to your particular situation.



The areas and topics that a sales enablement RFP should cover are:



MARKETING: Content profiles, predictive content, discover and search, automation and personalization



SALES: Personalization, collaboration, engagement



SALES ENABLEMENT: Training, communication



INTEGRATIONS: Marketing Automation Platforms, email clients, CRMs, LMS, content repositories



ONBOARDING: Support, implementation procedures, customer success



VENDOR: Engineering resources, headcount growth, financial health, product roadmap

Once you've assembled your RFP, send it off to your short list of vendors and await their responses. Twiddle your thumbs a bit. Upon receiving the responses from the vendors, it's time to sit down with your trusted advisors in the sales enablement buying process. While reviewing the responses, read closely to ensure that the vendors answered your question directly and honestly. The responses should align with exactly what you've asked for, and if they don't then that's a red flag.

After taking the time to pore over the responses, reach a consensus and select a vendor!

After you've selected the vendor, it's time to turn internally and begin building your business case to present to the decision makers within your organization.

PHASE 6:

Build Your Business Case

Timeline: 1 Month

Key Stakeholders: C-Suite, Procurement, Sales Enablement

Additional Resources: How to Build a Business Case for Sales Enablement Software

It might sound counterintuitive to start building a business case after selecting your solution, but trust us, it makes sense. In the previous phases, you were really just dipping your toes in the water. You were the belle of the ball seeing what kind of suitors were out there for you.

But, once you've finally selected a vendor, the real work begins. Now it's time to build your business case. In the previous phases you looped in some key stakeholders, but now you're going to be presenting your recommendation to the decision makers within your organization.

Because a sales enablement solution is no small investment, the business case is an incredibly important step in your buying journey. You're the smarty-pants who knows all the reasons why a sales enablement platform is a must-have for your organization. You've done your homework and are convinced of the exact solution you need. But the people who sign your check—the ones who will be heaping adulations on you when this transforms your sales and marketing teams—might not be as up-to-speed as you are.

> Because a sales enablement solution is no small investment, the business case is an incredibly important step in your buying journey.

This is where the business case comes in. You need to build a thorough case that will answer any questions the decision makers have. Think of this as the presentation of your thesis that you spent the entire semester preparing. Only instead of a silly college course, this business case will determine the fate of your career! Just kidding. But really, it is an important step.

When crafting your business case here are some important things to include in your presentation:

- **RETURN ON INVESTMENT:** Hit them with the most important information right off the bat. How much is this project going to cost? What are the benefits the organization will see in terms of more closed deals, increased productivity, and more efficient processes? For decision makers a great ROI is like honey to a bear.
- **PLATFORM CAPABILITIES:** With the value and benefits of the solution clearly stated, it's time to show how. Illustrate how Sales and Marketing will be able to collaborate better than ever, the way content analytics can be measured accurately, and how the content process will become a lean, well-oiled machine.
- **IMPLEMENTATION PROCESS:** How is the platform going to be implemented? What resources will have to be shifted to ensure it is successful? How long will it take? What quick wins will we see? These are all questions that need to be answered.
- **VENDOR QUALIFICATIONS:** Why did you choose the vendor you did? What are their qualifications for working with an organization like yours? How are they going to partner with you through the implementation and into the future?

That's it! You did it. You've successfully pitched the business case to the decision makers within your organization. That low roar you hear in the distance is the crowd going crazy at your presentation. They can't believe how brilliant you are for finding a way to transform the organization.



Conclusion

Making the decision to purchase a sales enablement solution is an important one for any organization looking to embrace digital transformation.

A Brainshark study found that **59% of organizations with a sales enablement solution surpassed revenue targets**. A sales enablement platform produces real effects on revenue, improves Sales and Marketing alignment, and provides insights into content's effectiveness that have long been impossible to unlock.

Because of these incredible benefits, the purchase of a sales enablement platform is a big decision that requires many steps. This guide has helped you outline what your approach should be as you go through your journey. The phases are:

- Readiness Checklist
- Build Your Team and Set Your Goals
- Research the Vendor Landscape
- Create a Shortlist of Vendors
- Issue a Formal RFP
- Build a Business Case

All of those steps will position you and your organization for success with sales enablement.

But of course, that's not the end of your sales enablement journey. Once you've successfully partnered with a vendor that is invested in your success, it's time to actually implement the sucker. That's a whole other can of worms to be covered in our Sales Enablement Implementation Guide. Rest your eyes for now. We'll get to that part after you've gone through all the steps above. Good luck!

LEARN MORE:

See how sales enablement improves your tech stack



About Seismic

Seismic is the leading global marketing and sales enablement solution, improving close rates and delivering larger deals for Sales while increasing Marketing's impact on the bottom line.

Large enterprises use Seismic to increase sales productivity through the automatic distribution of relevant information and personalized content to reps for any buyer interaction. Powerful content controls and visibility into usage ensures brand integrity and reduces risk. Seismic's machine learning and analytics capabilities continuously improves the entire enablement process for large enterprises, increasing the ROI of sales content and tying it directly to revenue. Headquartered in San Diego and with more than 300 employees across the globe, Seismic is privately held by its executive team and investment firms General Atlantic, JMI Equity, and Jackson Square Ventures.

To see how Seismic is being used by firms in your industry, visit **www.seismic.com**.

SEISMIC