Sales Engagement Checklist

When vetting Sales Engagement platforms, consider what teams you need to support and which use cases you want to address with this technology purchase. Then, use the checklists below to vet vendors. Effective Sales Engagement solutions should support all the use cases and offer all the features shared in these lists.

Use Case Checklist

Provide Workflow Management

- Guide producers with established playbooks and sales journeys.
- Easily manage and execute workflows from the platform, inbox, or CRM.
- Alert sellers when to take action with lead-scoring, engagement notifications, or pre-scheduled tasks.

Support Personalization at Scale

- Personalize written communication with dynamic tags.
- Access data from a variety of sources in a single pane of glass to tailor messaging, embedded videos, links, or attachments.
- Communicate with leads in their preferred channel with engagement tracking and channel-based opt-ins.

Offer Automation and Deal Administration

- Automatically log multi-channel tasks (email, phone, and more) and record notes.
- Manage contact, opportunity, and account information from a single platform.
- Log all seller activities and buyer engagement data by contact and account and sync across all integrated systems, including your CRM.

Empower Coaching and Process Optimization

- Securely record and transcribe every virtual meeting (with client consent), take in-call notes for follow-up and share entire calls or snippets with internal teams and/or clients.
- Playback calls at fast speed and skip to key topic areas to look for opportunities to coach teams and/or share best practices.
- Help you easily view all active calls, listen in to live conversations, let you join calls, and offer whisper guidance in real-time.
- Allow sellers to ask for help or add internal subject matter experts to live calls with ease.

Build Trust and Reliability

- Track contact preferences across all channels to comply with GDPR, CCPA, and other regional regulations.
- Consider factors like security, uptime, deliverability, and quality of service.

Sales Engagement Feature Checklist

Support Personalization at Scale

- [ ] Workflow management
- [ ] Automation rules
- [ ] Buyer journeys/cadences
- [ ] Engagement and activity tracking
- [ ] Analytics and live feeds
- [ ] Lead scoring and routing
- [ ] Data sync across all systems

Quota and Forecasting

- [ ] Attainment tracking
- [ ] Pipeline health and gap analysis
- [ ] Individual deal health and strategy

Rep Activity Channels

- [ ] Guided selling
- [ ] Sales email
- [ ] Calendaring
- [ ] Dialer
- [ ] Texting
- [ ] Social selling

Coaching

- [ ] Live call oversight
- [ ] On-demand coaching playlists
- [ ] Call recording and meeting capture
- [ ] Conversation Intelligence
- [ ] Transcription and conversation analysis

Governance and Compliance

- [ ] Channel-specific DNC
- [ ] Recording governance
- [ ] Team settings and access control

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