

Salesloft.

# Your 10-Step Checklist for Building a Modern Revenue Tech Stack

What to Do		How to Get It Done		When to Check In		What This Could Look Like
1. Assess your current tech stack		Evaluate if your stack is a “point solution patchwork” or a “manual legacy system” using criteria like tool integration and process automation.		Conduct a thorough review quarterly.		You find a disconnected CRM and isolated AI tools, revealing silos in data and inefficiencies in collaboration.
2. Identify gaps in the four components		Map your current stack against the four components: Signals, AI, <u>Revenue Orchestration</u> , and CRM. Look for missing or underperforming pieces.		Review semi-annually with cross-functional input.		Your audit reveals strong signals tracking but weak AI implementation, prompting an investment in unifying insights.
3. Set measurable outcomes		Align investments with specific goals, such as improving deal cycle time, increasing retention, <u>repeating winning selling behaviors</u> , or enhancing pipeline visibility.		Revisit goals quarterly during business reviews.		Your team aligns on increasing pipeline visibility, leading to a shared dashboard that tracks progress in real time.
4. Focus on actionable signals		Prioritize <u>buyer signals</u> like pricing page visits, demo requests, and trial sign-ups. Ensure they are accessible and actionable for all teams.		Sync weekly to review signal quality and workflows.		Signals guide your sales team to prioritize demo requests, leading to a 25% increase in conversions to opportunities.
5. Deploy AI for predictive insights		Use AI to <u>connect data across teams</u> and recommend next-best actions. Prioritize predictive tools that align with your workflows.		Assess AI recommendations monthly to refine.		Your AI tool identifies accounts with declining engagement, enabling proactive customer success actions that reduce churn.

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6. <b>Orchestrate workflows across teams</b>		Implement a <a href="#">revenue orchestration platform</a> to unify tools and automate processes like handoffs, follow-ups, and prioritization.		Monitor workflows weekly to ensure collaboration.		Unified workflows reduce manual errors and increase your cross-team efficiency, leading to faster deal closures.
7. <b>Optimize CRM functionality</b>		Connect your CRM to orchestration to enhance its role as a data hub and reduce manual tasks that typically cost sellers <a href="#">60% of their day</a> . Focus on automating data capture and sharing actionable insights.		Review CRM integration monthly to ensure alignment.		CRM integration highlights renewal risks, allowing customer success to intervene early and improve retention rates.
8. <b>Build a unified data model</b>		Consolidate data from all GTM teams into a shared framework that surfaces actionable insights and predictive trends.		Review dashboards monthly to ensure usability.		<a href="#">A unified dashboard</a> highlights pipeline gaps, helping you reallocate resources effectively to meet revenue goals.
9. <b>Start small, scale strategically</b>		Begin with one high-impact workflow, such as automating lead follow-ups or <a href="#">accelerating deal cycles</a> , then expand to other areas based on results.		Review progress bi-weekly, iterate as needed.		Automating lead follow-ups increases conversions by 30%, encouraging expansion to trial user workflows.
10. <b>Plan for growth</b>		Expand workflows and integrations as your organization matures. Focus on areas where automation and AI drive the most impact.		Conduct planning sessions every six months.		AI-powered account scoring uncovers cross-sell opportunities, increasing ARR by 20% in a year.

# One platform, limitless potential.

Salesloft's Revenue Orchestration Platform is the foundation of a modern tech stack — designed to unify your teams, activate your data, and deliver the AI-driven outcomes your business needs. [Request a demo today](#) and see how orchestration turns possibility into results.

**Get Demo**

Salesloft delivers a Performance Force Multiplier, enabling the most demanding companies to drive durable growth in a new economic era. Salesloft's Revenue Orchestration Platform, delivering the first AI-powered Durable Revenue Engagement Model, keeps market-facing teams on top of all buyer signals, with outcomes-driven prioritization so they always act first on what matters most.

**Salesloft.**

