Salesloft.

The Sales Tech Stack

OFFICIAL SALESLOFT GUIDE

YOUR GUIDE TO SALES ENGAGEMENT

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“Sales engagement tools top the list of the most helpful tools according to sellers.”

Above:
Forrester, Now Tech:
Sales Engagement Solutions, Q2 2022

Right:
(1) “A Deeper Dive Into Forrester’s Sales Enablement 2020 Predictions: A Conversation With Caroline Robertson And Mary Shea,” Mary Shea, Principal Analyst, Dec. 30, 2019

It’s no surprise that more companies are moving toward a digital workforce, introducing more complexity in the sales cycle and in the way we interact with customers and colleagues. Most commonly, we hear these challenges:

- Managing my workforce remotely is hard.
- I don’t have enough visibility into pipeline and deals to forecast accurately, ensure we’re hitting our numbers, and prevent deals from slipping through the cracks.
- Multiple tools make selling complex and tedious.
- Inefficient processes and too many manual tasks cost my team valuable selling time.

Buyer expectations pose their own set of challenges for revenue teams, too. Selling today is about creating hyper-personalized, convenient, one-to-one experiences. Thanks to companies like Amazon, Instacart, and Target, the customer buying experience has not only changed the game for retailers, it’s changed the game for B2B sellers. Because buyers — even B2B ones — don’t care about your sales process. They care about their needs.

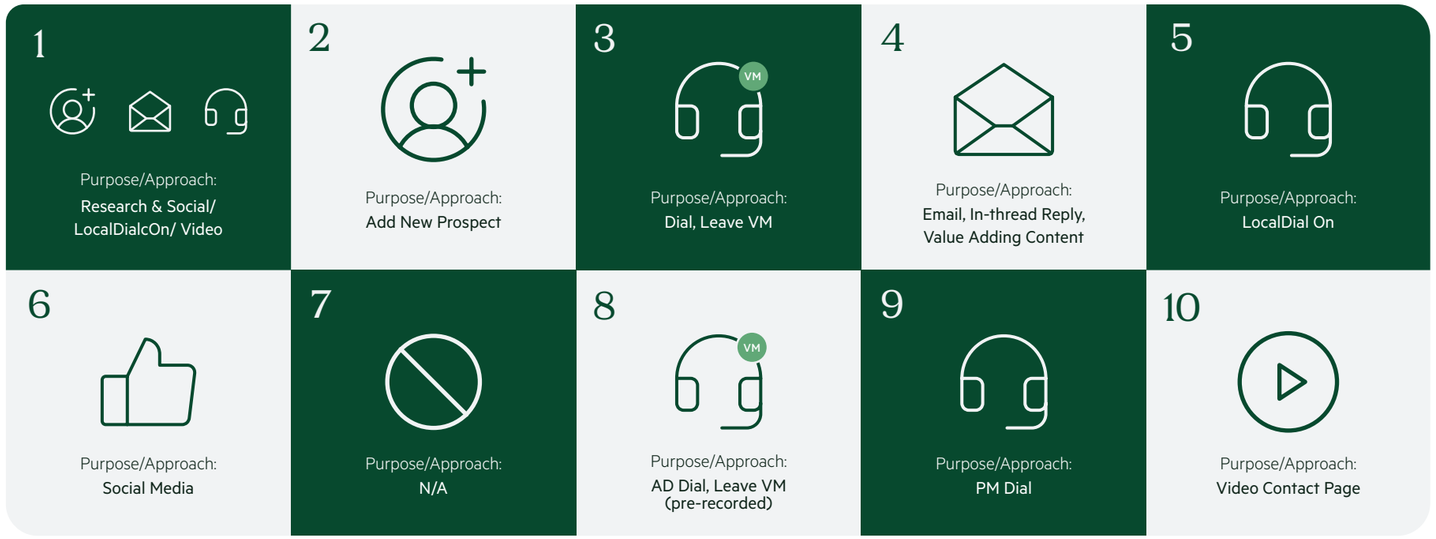
According to Forrester, “Buyers are people, and people crave human connections. … [As] long as sellers aren’t pitching them on what they already know but are engaging with them in tailored, meaningful, and dynamic ways, buyers will want to engage with them and to gain more value from those interactions.” [1]

That’s where Sales Engagement comes in.

Sales Engagement guides sellers through a consistent, repeatable process focused on creating meaningful, personalized interactions with prospects and customers throughout the full revenue lifecycle.

It turns your CRM data into a series of easy, actionable, multi-channel steps that help get reps to “yes” quicker.
“Yes, I’ll take your call.” “Yes, I want a demo.” “Yes, send me the contract.”

It also helps sales leaders replicate the behaviors of their best-performing salespeople across the entire sales team, while remaining objective about pipeline health, performance, and forecasting.



New prospect cadence (sales play) example

What Is Sales Engagement? *continued*

Sales engagement simplifies and streamlines your tech stack and sales process. It helps sales teams gain efficiency by automating their tasks and reducing administrative burden. The result? More time for selling and meeting revenue goals. It also supports Customer Success and Account Management teams in driving adoption, expansion, and renewals throughout the customer lifecycle.

Ultimately, sales engagement helps your entire revenue organization -- from Marketing and Sales to Customer Success -- more effectively generate pipeline, manage deals, and engage customers.

It guides and automates dynamic sales plays, facilitates forecasting and coaching, and provides the dashboards and insights needed to achieve exceptional outcomes. Reps can focus on selling, managers can focus on coaching, and leaders and operations teams can focus on strategy.

In this eBook, we'll share how revenue teams can benefit from sales engagement, how it fits into the tech stack, and what a best-in-class Sales engagement platform should do.

Three Stages of Sales Engagement

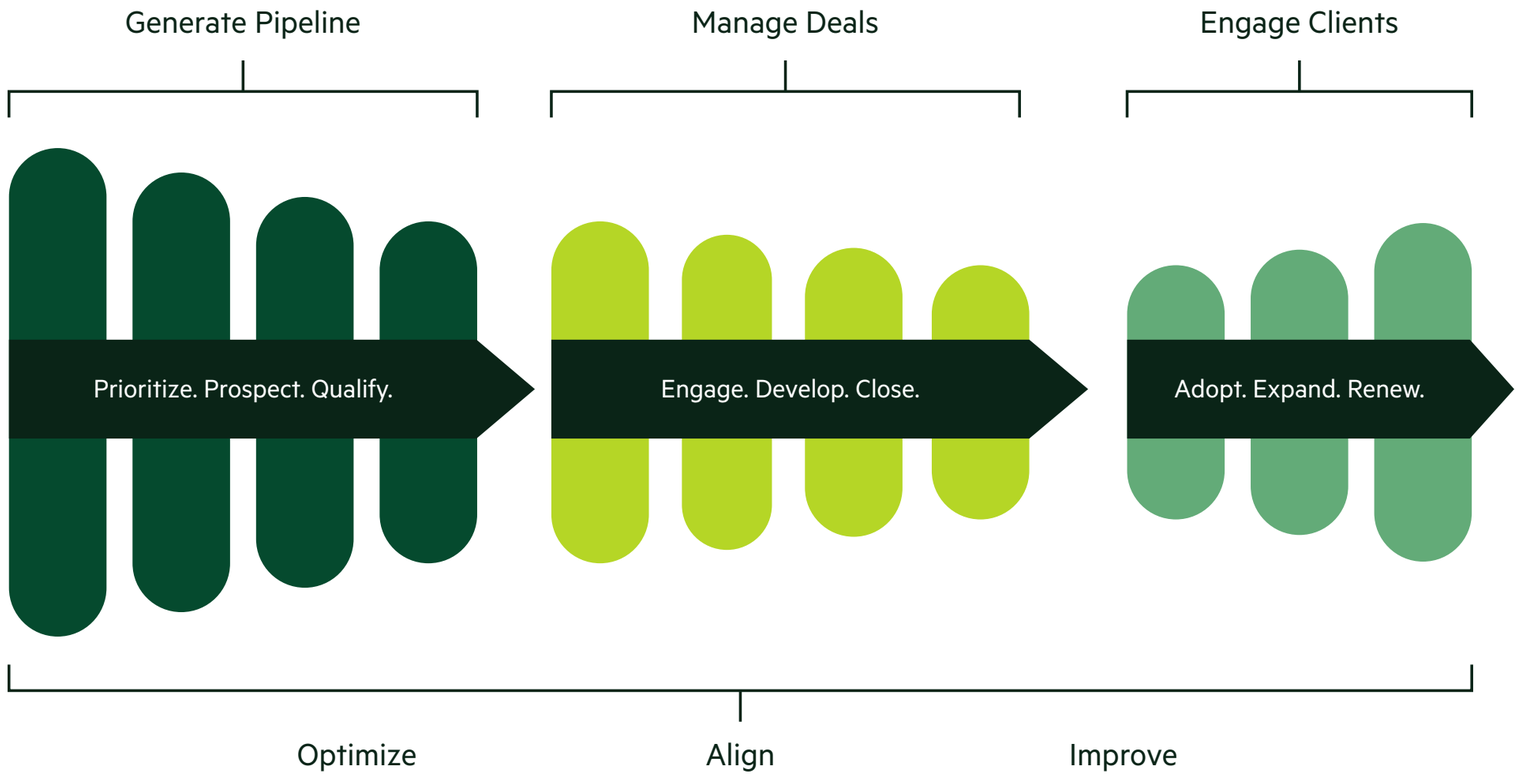


Exhibit 1

How Revenue Teams Benefit From Sales Engagement

You may still be trying to understand if a sales engagement platform can benefit your organization specifically. If so, here are some questions to consider: If the answer to any of these questions is "I don't know," sales engagement can help you fill the gaps.

- How much time do your reps actually spend each day on tactical, non-customer facing activities?
- How many emails do your reps send each day?
- What are the most effective channels to engage prospects?
- How many touches does it take to move opportunities to the next deal stage?
- How well are your sellers following your go-to-market process or methodology?
- What are your A-players doing differently than the rest?
- How healthy and deep is your pipeline, really?
- How confident are you in your current forecast?

"

Sales engagement streamlines manual tasks, workflows, and data capture. Originally designed to help sales development functions manage high call and email volumes, companies in this segment can now deliver sizable **productivity gains to entire revenue teams** by automating manual tasks, sequencing omnichannel touchpoints, setting up workflows, and capturing and uploading data from buyers' and sellers' interactions.

Forrester Research,
Now Tech: Sales Enablement Automation
Q2 2020, May 2020

Six Business Benefits of Sales Engagement

50%

increase in annual prospecting activities

$1.6M

in profit growth from customer renewal rates over three years

$744K

savings by getting rid of sales tech that serves only one purpose

10%

Boost in sales productivity

60%

Increase in sales-qualified “lead to opportunity” conversion rate

25%

less time spent in seller onboarding

Source: The Total Economic Impact™ Of SalesLoft, a February 2022 commissioned study conducted by Forrester Consulting on behalf of Salesloft.

All results over a three-year period.

How Sales Engagement Helps Each Role

Revenue teams of all shapes and sizes can win with the right sales engagement platform, and each role within the revenue organization can reap direct benefits from it. **Automated workflows save reps time, reduce manual effort, and increase effectiveness.**

Sales Managers gain better insight on what works and have more time for coaching and scaling best practices across the team. And Sales Leaders will have more confidence in their forecasts and their team's ability to deliver on it. Here's a detailed breakdown of how Sales engagement helps all revenue-generating roles.

Sales Leaders

Dependable forecasting, developing and retaining talent, and remaining agile through change are at the top of your list of challenges. **With all deal and engagement data in one platform, you can** forecast **right within your workflow, more predictably generate revenue, and drive organizational alignment.** Coaching features help your managers scale your sales organization and keep satisfied talent in-house.

Marketing Leaders

As keepers of the brand, you need to maintain consistent messaging across all revenue-generating teams. You also need to understand what tactics resonate with prospects. Sales engagement helps with email templates and A/B testing options. By using these features to collaborate with Sales on messaging, you get **an improved inbound response and consistent execution of your go-to-market message throughout the customer journey.** You'll also strengthen the relationship with your Sales counterparts. Analytics will provide more insight into Marketing's impact on revenue, too.

How Sales Engagement Helps Each Role *continued*

Sales Operations/RevOps

Sales Engagement helps you simplify your tech stack, consolidating multi-point solutions in a single platform that reduces organizational inefficiencies, cuts costs, and improves productivity at every level of the revenue engine.

Forecasting should be part of your sales engagement platform with the ability to drill down into deals and take action right within the workflow. And with the ability to create actionable playbooks and curate best practice libraries, you can more effectively drive adoption of the best revenue-generating processes, from Sales to Customer Success.

First/Second Line Managers

Sales Engagement streamlines the activities you do every day, offering more insight into sales execution, pipeline coverage, team and individual performance, and pipeline and deal health.

Drive process adoption and consistency to generate more pipeline and ensure teams are winning every winnable deal. Gain more time in the day to coach, ramp new sellers, and help teams hit their number, every time.

- Get complete visibility into sellers' activities at a glance. **Opportunity management and "deal view" features provide a holistic pipeline overview** and help you keep deals on track.
- View team and individual dashboards with pre-set targets to identify one-on-one coaching opportunities.
- Live call features help you listen to calls and seamlessly join or deliver in-the-moment feedback that only the rep can hear.
- **When you can't join a call, rely on conversation intelligence features to help you coach later.** Review transcribed calls quickly by jumping to mentions of key topics like next steps, pricing, and competitors. **Make notes directly in the transcript to easily share your feedback with reps.**
- Identify trends among your team and create coaching playlists to ramp new sales reps faster and replicate success across your entire sales organization.
- Review rep activity logs and **analytics to keep a pulse on how effective your sales process is** and ensure your team is hitting its activity performance metrics.
- **Refine your sales process with platform testing capabilities.** Test new messages, templates, and cadences to identify what works best.
- Forecast right within the platform to easily drill down into deal data. Plus forecasts automatically roll-up.

How Sales Engagement Helps Each Role *continued*

Sales Representatives

Sales engagement helps sellers consistently hit targets by guiding you through a set of easy-to-follow steps to connect with prospects and customers. **Manage pipeline at a glance, never missing an opportunity with deal and engagement notifications tied to lead scoring and gap analysis.**

Sales engagement also tracks and syncs all activity and engagement data across key systems. This reduces administrative burden and improves predictive models, so you can focus on what counts: the buyer.

- **Flawlessly execute sales plays with easy-to-follow cadences.** Personalize cadences by account to **continually improve your effectiveness.**
- **Cadence analytics will help you understand open, click, and reply rates for email messaging** and use call analytics to find what works and what doesn't.
- Dialing features let you **connect with one click from a computer, mobile device, or desk phone,** while all calls log and sync with your CRM.
- Combine email, phone, social media, and direct mail touches to engage prospects and customers.
- **Connect more personally with familiar prospects and customers** by incorporating texting into your communication strategy.
- **Save time with automation rules** and react in real time to buyer behaviors with automation rules **that trigger based on persona, field updates, activity, or account tier.** Match every buyer's timezone with scheduled sends and alerts.
- Opportunity management features help you take live call notes, share auto-generated call summaries, and update or create new opportunities directly from the platform while syncing with your CRM.
- **Faster opportunity data updates** allow you to spend more time on deal strategy and less time updating pipeline. Review your deal dashboard to get a comprehensive look at your pipeline and any deal gaps so you can drive next best actions and win more opportunities.
- Leverage calendar features to easily share your schedule with customers.

How Sales Engagement Helps Each Role *continued*



Customer Success Managers

Sales Engagement extends beyond the initial sale. **As a customer success manager, you have three main goals — adoption, expansion, and retention, which is where Sales Engagement comes in.**

Use cadence automations to:

1. Onboard new customers by providing self-service resources that **help them gain proficiency with your products.**

2. Drive deeper product adoption and engagement with **ongoing communications that help optimize their performance.**

3. Set up regular, personalized touchpoints with your customers to help uncover underutilization of your products as well as customer pain points, while **creating opportunities to provide specific recommendations for improvement and strengthen the relationship.**

76%

of high-growth companies have a sales engagement solution

Forrester Research,
Now Tech: Sales Engagement Solutions, Q2 2022

How Sales Engagement Fits Into the Sales Tech Stack

While sales engagement is a fundamental technology for any modern sales organization and can be used independently, it also complements and enhances other technologies such as CRM and Marketing Automation tools.

Think of a sales engagement platform as a co-pilot for your CRM. While CRM is a system of record for all customer data, Sales engagement is a system of execution that integrates with your CRM to make its data actionable. Marketing Automation reaches the largest audience using a one-to-many format and brings additional data and insight into the other tools.

With this system of execution, sellers get a streamlined workflow that reduces administrative burden and increases information capture. Frontline managers get insights surfaced on every deal, so they can focus on the deals that help teams hit their numbers.

Ultimately, Sales Engagement helps your entire revenue organization – from Marketing and Sales to Customer Success – more effectively generate pipeline, manage deals, and engage customers.

How Sales Engagement Fits Into The Sales Tech Stack

continued



Exhibit 3

Marketing Automation, Sales Engagement, and CRM:

3 Key Systems to Align Your Inbound and Outbound Sales Strategies

Marketing Automation
System of Audiences

- Engage an Audience
- Mass Emailing
- Drip Campaigns
- Landing Pages
- Web Forms
- Web Analytics
- Fully Automated Campaigns

CRM
System of Record

- Repository for Customer Data
- Workflows & Approvals
- Centralized Revenue Reporting
- Forecasting Data
- Account Assignments & Territories
- Quotes & Proposals
- Task Tracking

Sales Engagement
System of Execution

- Engage Buyers/ Customers
- Create Actionable Playbooks
- Manage Opportunities
- Quota Forecasting
- Coach Reps in Real-time
- Curate Best Practice Libraries
- Automate Data Syncing

Insight

With marketing automation platforms, marketing teams can distribute, track, and measure mass communication to prospects.

By contrast, sales engagement platforms facilitate personalized, trackable, one-to-one conversations between sellers and their prospects, leads, or customers.

Marketing Automation and sales engagement is not an either or proposition. Marketing automation is not a substitute for sales engagement or vice versa. Rather, these platforms work together with your CRM to align Marketing and Sales by creating a system of tools that empower salespeople to successfully work the inbound leads brought in by Marketing.

How Sales Engagement Fits Into the Sales Tech Stack

continued

Insight

Contact, account, opportunity, activity, and buyer engagement data is captured by the sales engagement platform in real-time and automatically synced across integrated systems. Reduce administrative burden on reps and managers while improving data integrity and feeding predictive models.

Understanding the Relationship Between Sales Engagement and CRM

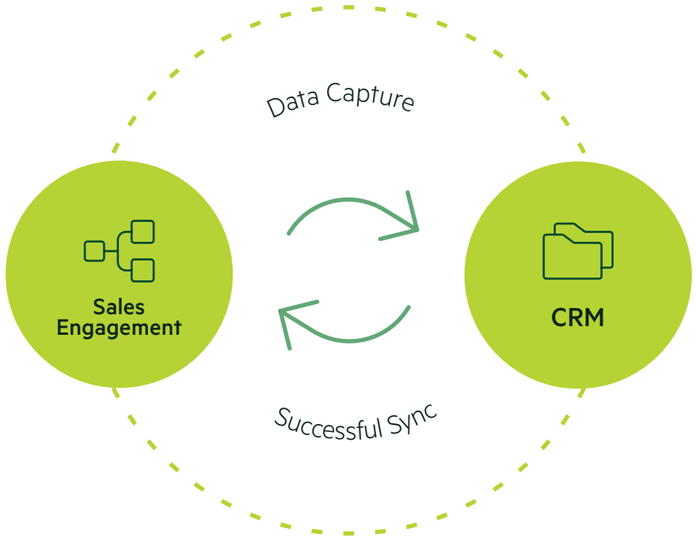


Exhibit 4

CRM: System of Record

- Create customer records
- Update customer records
- View reports

Sales Engagement: System of Execution

- Contact prospects, leads, and customers found in your CRM via automated and/or personalized multi-channel steps.
- Activities executed in sales engagement platform sync back to CRM.
- Measure and replicate success for all your sales activities.

How Sales Engagement Fits Into the Sales Tech Stack

continued

Ultimately, effective sales engagement platforms reduce the required tech stack for revenue teams by offering a single solution for strategy execution and automation, opportunity management, and coaching.

Yet, not all sales engagement platforms are created equal. Some require you to purchase a separate dialer, call recording, forecasting, coaching, or opportunity management solution in addition to your Sales engagement investment.

There is a lot of value in selecting a complete sales engagement platform.

- Save money by retiring legacy point solutions and leveraging economies of scale.
- Increase revenue by keeping sellers focused within one solution.
- Save time when reps are not jumping from one point solution to another.
- Avoid burdening your legal, procurement, and IT teams with multiple contracts and points of contact.
- Eliminate the finger pointing, confusion, and down time that accompanies an issue involving multiple vendors.
- Increase adoption when sellers only have one platform to learn and use.
- Download this calculator to see if you have functionality gaps in your current tech stack.

> “Overlapping capabilities can cause confusion, which is disruptive not only to internal teams but also, more importantly, to the buyer experience.
>
> Forrester Research,
> *Now Tech: Sales Engagement Solutions, Q2 2022*

Integration + Usability

Since marketing automation and CRM are foundations of a solid tech stack, be sure the sales engagement platform you choose integrates not just with your current vendors, but also with any other vendors you may use in the future. If your goal is to upgrade your CRM to Salesforce, make sure your sales engagement solution supports unlimited doesn't custom fields and custom objects. Microsoft Dynamics 365 and Hubspot are also popular CRMs that you will want integrations with.

Beyond CRM, these are some of the most common types of tools that you would need to intergate with sales engagement:

- Conversational marketing
- Data enrichment
- Video conferencing
- Social selling (think LinkedIn Navigator)
- Video
- Customer success software
- Sales enablement.

See what top revenue organizations consider to be the perfect tech stack.

When trying to determine how a new solution will fit in your tech stack ecosystem, here are some questions to ask the vendor:

1. Does your platform integrate with my current CRM?
2. What are the available partner integrations?
3. What limitations, if any, does your platform have in relation to integrations?
4. What type of integration guides and support do you offer?
5. How would your platform help us consolidate our tech stack?

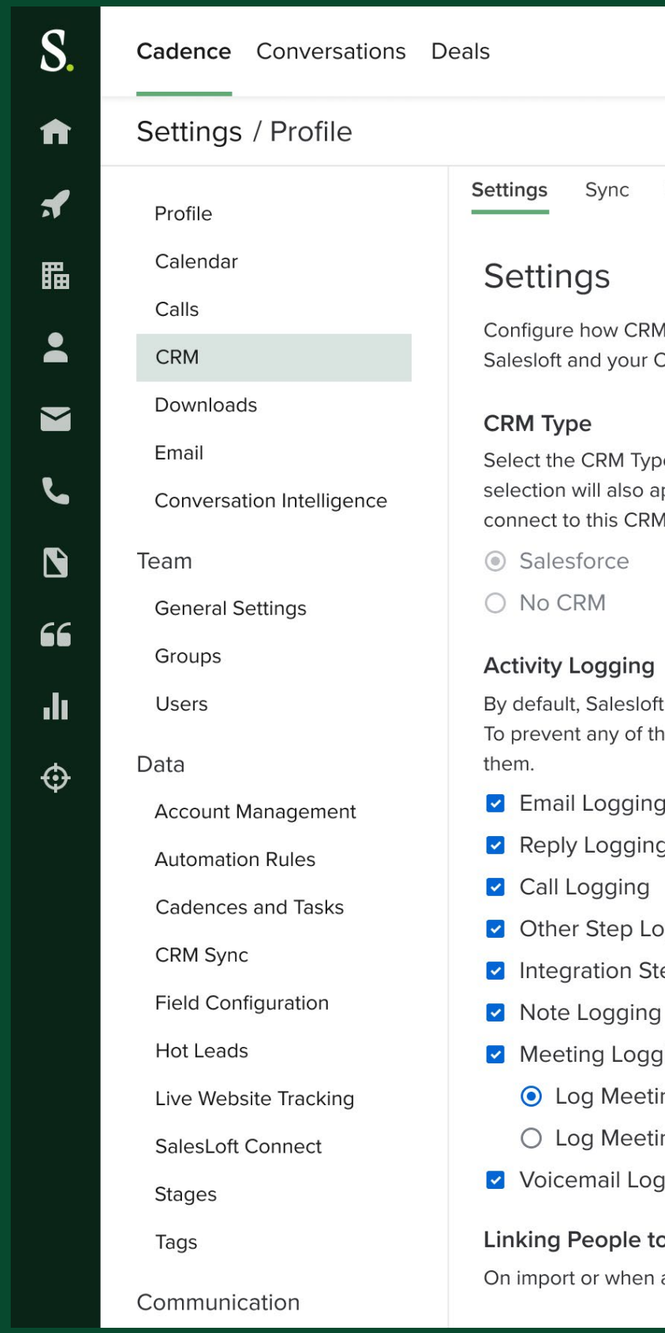
Sales engagement vendors vary on their integration strategy. So, when vetting technologies, buyers should look for platforms that not only integrate with best-of-breed technology but also offer robust API guides and customer support.

Integration + Usability

continued

Even so, when evaluating vendors, it's important to assess usability on a platform-by-platform basis. Here are some questions you should ask each vendor:

1. How do reps access the platform?
2. Are reps required to execute within the desktop application?
3. Does the platform offer a mobile app?
4. Can reps work directly from their email inbox?
5. Can reps schedule calls from their calendar?
6. Can reps execute directly from their CRM?
7. What SSO options are available?



Sales Engagement Evaluation Guide

Effective sales engagement platforms should deliver more than just omni-channel cadences. The right solution will support your entire revenue organization and the full sales cycle, with features designed to aid pipeline generation, deal management, and customer engagement.

It's key to remember that effective sales engagement is not just about getting by. The right Sales engagement platform will help you **exceed** pipeline goals, revenue targets, buyer and customer expectations, and more. How? By guiding and automating dynamic sales plays, facilitating coaching, and providing the dashboards and insights needed to achieve exceptional outcomes.

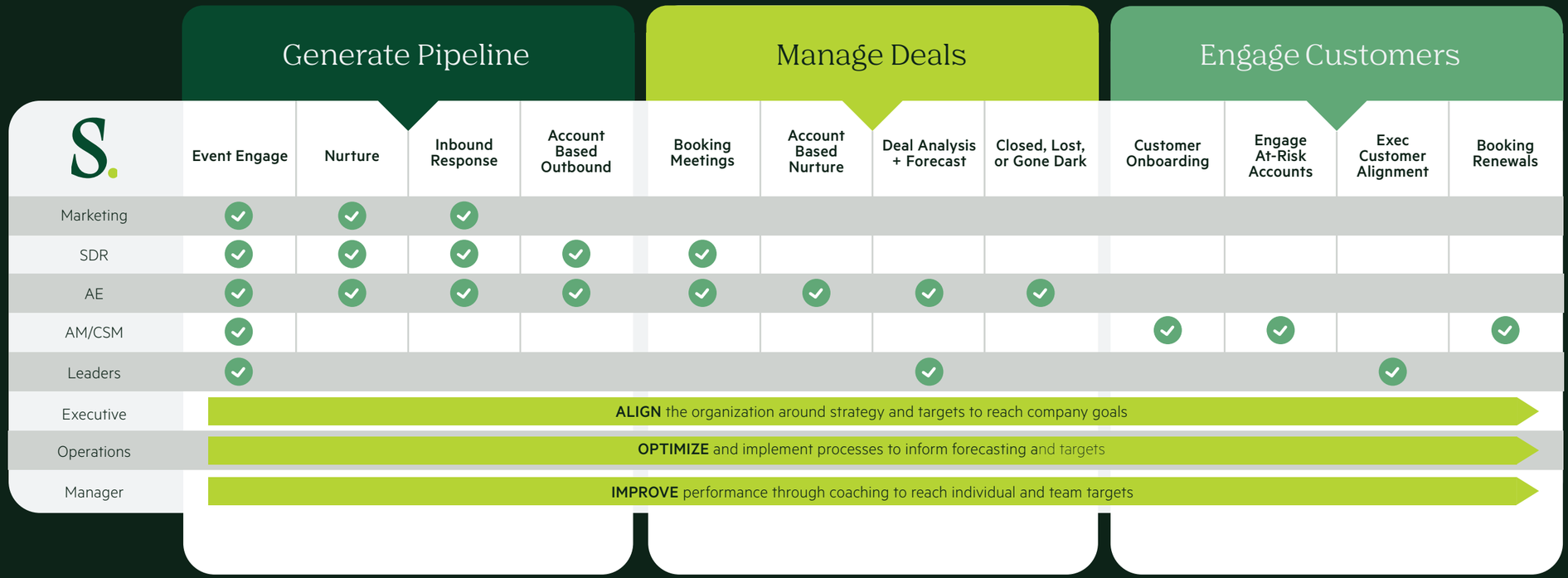


Exhibit 6

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 sellers 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 and one-to-one customization.
- [ ] Access data from a variety of sources in a single pane of glass to tailor messaging, embedded videos, links, or attachments.
- [ ] Communicate with buyers in their preferred channel with engagement tracking and channel-based opt-ins.

Offer Automation, Deal Management, and Forecasting

- [ ] Confidently forecast a number and then take action to deliver on that number every quarter.
- [ ] Manage contact, opportunity, and account information from a single platform.
- [ ] Automatically 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

- [ ] Help you easily view all active calls, listen in to live conversations, let you join calls, and offer whisper guidance in real-time.
- [ ] Use pre-set targets to track seller progress toward goals, identify challenges, and improve coaching in one-on-ones.

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
- [ ] AI powered forecast
- [ ] Automatic forecast roll-up

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
- [ ] Single view of seller performance
- [ ] Transcription and conversation analysis
- [ ] Set outcome-based goals

Governance and Compliance

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

Case Studies: Driving More Revenue Faster With Sales Engagement

We've talked a lot about what Sales Engagement can do and how it can help your revenue teams. But rather than take our word for it, check out these customer success stories.

Cognism

Implemented Sales Engagement, giving SDRs and AEs ways to more effectively prospect, follow up on tasks, cover more accounts, and save opportunities from being lost. **The company has since realized nearly 300% growth, going from 2.5 to 7 million ARR in less than a year.**

Learn more

überflip

Accelerated and scaled its account-based marketing performance with Sales Engagement. The Marketing and Sales teams launched an award-winning campaign, **generating more than 3000% ROI on pipeline value and a 450% return** on closed revenue to date.

Learn more

PandaDoc

With Sales Engagement, the **PandaDoc** sales team created workflows and cadences to manage its inbound sales efforts and **grew ACV by ~35% without extending time to close.** The company has also discovered unexpected process efficiencies by extending the platform to its Customer Success and Finance teams.

Learn more

Case Studies: Driving More Revenue Faster With Sales Engagement

continued

These companies saw a return on investment because sales engagement facilitates meaningful, human connection between buyers and sellers.

It improves data accuracy and forecasting for leaders. It helps managers coach their sellers and scale success throughout the organization.

Do you have the right sales technology to support your revenue teams?

Salesloft is the **only full-cycle** sales engagement platform, meeting the needs of all revenue generators. High-performing sales teams choose Salesloft to more effectively generate pipeline, manage deals, and engage customers.

But the platform serves more than just traditional sales reps. With Salesloft, customer success teams also drive adoption, expansion, and renewals. Managers enhance their coaching and scale successful processes, while sales leaders improve their forecasts. Salesloft isn't CRM or marketing automation, it's sales engagement — done right.

See Salesloft in Action