
The Agile Sales Tech Stack

A Guide to Growth Through Leveraging Key Technologies

By Matt Behrend

TABLE OF CONTENTS

The Challenge

Where to Start

Example Tech Stack

Steps to Build and Manage Your Agile Tech Stack

Step 1: Map out your sales org
and processes

Step 2: List key activities and metrics

Step 3: Find tech that affects key activities
and metrics

Step 4: Prioritize and buy

Step 5: Implementation
(team, cycles, tactics)

Step 6: Repeat

A Note on Using Consultants

Summary and Conclusion

Consensus and the Agile Tech Stack

THE CHALLENGE

It's difficult to be agile in discovering, vetting, testing, and launching new tech for your sales stack. So, too many companies are sold a tech stack, unaware that they're not building with agility in mind. There are two camps, those who hesitate because managing their tech stack is risky and expensive and those who understand that it is more risky—and pricey—to ignore technology as a competitive advantage. No matter where you are in sales, large company or small, you understand this all too well.

The challenge is in knowing what tools you need in order to help the team reach the company's sales goals, and then setting out to find tools that will get those results. You need a well-designed, thought out sales tech stack without risking the rollout of technology that isn't sticky, efficient, user-friendly and becomes shelf-ware, an all too common result in today's sales organizations.

The Purpose

The purpose of this brief is to give you some answers to these challenges and others you may face. We realize the "sales technology stack" in itself is a huge topic.

There are so many things to consider. We also realize that this topic is situational and might be very different for different readers for different reasons.

This is simply a framework to help you begin managing your tech stack on purpose, in a way that gets results. It's meant to help you start with the end in mind and lay out a path to get there. It was written to help simplify the challenge of choosing technology that will help your sales teams become more efficient and successful. You can be agile without all the risk if you can commit to this.

The following questions are among the most common when searching to round out tools and systems for sales. We hope to answer:

- Where do I start?
- Is there already a proven agile tech stack that I can copy?
- How do I determine what tech to buy first?
- Do I get pieces? Or one platform?
- Should we bring in a consultant?

WHERE DO I START?

Most sales leaders would agree that "where do I start?" is the most common question asked about the sales tech stack. It seems daunting, risky, expensive, and too complex.

Once you take the fear of failure out of the equation, the only real risk is not committing enough resources and the expense of not investing in, owning, and improving, your ever-evolving tech stack. The key is to treat it like any other complex system or process, and dig into the details.

EXAMPLE TECH STACK

This is pretty basic stuff, so you may want to skim this section, or stop in and soak it up.

Let's jump start your efforts with a look at a foundational agile tech stack followed by a step-by-step process for managing it. Remember, it's most important to match the design of your tech stack to your business model and company goals.

CRM (Customer Relationship Management)

What it is: CRM software is used to manage your current or future client data. It should gather, automate, and sync data and other information in marketing, sales, customer service, technical support and other customer focused areas.

Why it's needed: Christopher Ratcliff at Econsultancy writes, "It gives you the time to develop other areas of your business, whilst giving you the reassurance that you're not letting your existing clients down or responding to new enquiries in an efficient manner." A CRM gives you metrics on aspects of your business automatically and is often able to generate reports for you. It will also allow you to see the complete history of your company's interaction with a client.

Examples: Salesforce, Hubspot, Zoho

Real-time reporting

What it is: Real-time reporting tools pull together all your data sources and give you a real-time dashboard to guide your decision making. It turns your rudderless sailboat into a GPS-guided missile.

Why it's needed: All sales managers need real-time reporting to be able to track and measure every material aspect of the marketing and sales system in one place. Otherwise, you're just guessing. If it delivers real value and data, you can determine what's going to happen tomorrow, making improvements across your sales team to drive results.

Examples: Grow, Domo, Pipeliner, Tableau

Database provider

What it is: A data provider owns information about your past, current, and future customers. This typically includes a buffet of profile information that you can use to segment, create targeted lists, append inbound data, etc.

Why it's needed: A good data provider gives you access to a comprehensive database containing the contact info and segmenting info for the majority of your market. You can't proactively market and sell without it. Nearly all of your marketing and sales lead, contact, account, and opportunity data will need to be bought or appended at some point, and you'll need a data provider to do that.

Examples: Zoominfo, Data.com, OneDesk

Dialer

What it is: A dialer is a calling tool that automatically dials for a sales rep, and typically manages their list priority in an intelligently automated way. Dialers can have many other features, depending on the one you choose, but the primary role of this tool is to call numbers automatically and help salespeople be much more efficient and productive in their calling efforts.

Why it's needed: Sales are facilitated by conversations, and phone calls facilitate conversations. Manual dialing wastes time and money, and a good dialer can automate the dialing process, as well as the lead sorting process. A dialer saves time from manual dialing and helps reps to know who to call when, which increases productivity.

Examples: Insidesales.com, ConnectandSell, Velocity

Email automation tool

What it is: When we say email automation, we don't mean marketing automation (Marketo, Eloqua, Pardot, etc.) for lead generation. Sales email automation allows your reps to create, send, follow up, and track a high volume of initial and follow up email correspondence. Some of marketing tools can do this, but usually aren't designed as well as sales-specific email automation tools.

Why it's needed: Along with high volume dialing, reps need high volume emailing. A good sales email automation tool allows reps access to email templates to help them save time, notification of email opens, analytics that tell them which emails are the most effective, and a good mail merge feature for bulk follow up. It also integrates with your CRM so that you can log and report all email activity.

Examples: Salesloft, Yesware, Toutapp

Gamification

What it is: Gamification tools add game mechanics and visual elements to sales processes using data, collected from their activities, to motivate specific actions from salespeople.

Why it's needed: Your core activities need a gamified environment to foster competition, collaboration, mentoring, and an engaging environment. Gamification tools can turn your sales team's activities into a tracked and game-like competition, gives executive visibility into goals and activities, and can be used to reward and motivate your team.

Examples: Ambition, Insidesales.com, Bunchball

Demo automation tool

What it is: Demo automation allows you to email custom video sales demos, that the contact can personalize in real-time to automatically learn about your solution in a way that is relevant to them.

Why it's needed: This tool allows you to discover all stakeholders in the buying group and educate them in a personalized way so that they can make a faster and more confident decision to purchase your product or solution.

Example: Consensus

Coaching tools

What it is: Tools to help you record, analyze, and give feedback on your inside sales team's performance. Some of the dialers (insidesales.com, connectandsell, etc.) provide this functionality, but not as well as a tool designed from the ground up specifically for coaching.

Why it's needed: It is terribly inefficient to coach in real time. A good coaching tool records calls, makes them easily accessible to managers, and allows you to give feedback in the context of the call.

Examples: execvision, talkIQ



STEPS TO BUILD AND MANAGE YOUR AGILE TECH STACK

Step 1: Map out your sales org and processes

The key is just getting it down, whatever it looks like, so you can start to improve it. The first goal is no holes in the process, nowhere a lead can fall off into the abyss. Once that's done, it becomes optimizing each process in the system.

An example of a mapped out system and list of core metrics.

Step 2: List key activities and metrics

As a sales leader, you know the importance of measuring progress and success against company goals. Use this knowledge to decide what tools you really need. For example, are your salespeople already highly engaged and competitive but tend to get tongue tied sending an email? Then, focus on your email automation tool before gamification.

Choose the metrics that have the biggest impact on your company, then back out from those and start looking for technology that will have a positive effect on those metrics.

Unsure of how to gather and track those metrics? We don't go into deep detail on that in this document, but, put simply, you will need to:

- Reference your marketing and sales process (the customer journey)
- Identify where the critical conversion points are
- Benchmark against similar companies that you trust or your current numbers. Be careful not to compare apples and oranges.
- Collaborate with business leaders to identify other points of weakness or processes that have the most manual inputs.

Step 3: Find tech that affects key activities and metrics

First and foremost, do not wait for technology—or its salespeople—to find you. Be proactive by searching Google, starting or joining discussions on LinkedIn, and send out feelers to your network of peers. Now that you know what your process is and what you're measuring, you can recognize early in the search process what tech is potentially right or definitely wrong for your organization.

A note about point solutions versus a platform or suite:

There are definite trade-offs between them. Using a platform avoids app switching costs—frequently switching between too many apps can decrease productivity and void the benefits you were hoping for—but your technological agility is only as good as the single platform's product development team. Platforms also develop features 16 months behind most point solution feature sets. On the other hand, a stack of point solutions requires much more planning and testing up front, and could be a bit more expensive.

When done well, point solutions can help you leverage technology as a competitive advantage and achieve metrics that feel out of reach to your competition, which may outweigh the additional risk and effort required to build and manage a small stack of solutions.

Step 4: Evaluate, Prioritize Need, and Buy

Once you have an idea of a handful of tools that could fill your process and metrics gaps, it's time to evaluate them against specific criteria, prioritize them according to your most pressing measurement needs, and then make the decision to buy.

Here are the main requirements you should be looking for when evaluating and buying technology for your sales stack:

- **Integration:** It is vital that your tools integrate with each other. If your tools aren't able to talk to each other and play nice, you will end up pulling reports, inputting data, etc., in so many different tools that it will create more work instead of saving your team time and allowing them to focus on sales.
- **Productivity:** What do your workflows (day-to-day actions) look like? Does the software automate critical points in those workflows? If it can, it's worth looking at. If it can't, chances are high it won't be adopted and becomes shelfware.
- **Customer Experience (CX):** Evaluate the customer experience your audience is getting with you and with your competitors. Know their buying behaviors. Maybe a high-volume dialer doesn't make sense. Maybe it does. What's the CX? Knowing the journey and experience you want customers to have helps you decide on the tools to use.
- **Contracts:** Request to run a pilot or trial. Don't get locked in. If the software requires an annual contract and payment upfront, then simply get the minimum number of users first and expand later only if the tool proves its value and ROI. Never roll out a new solution without testing it first. Never pay retail. Always ask for discounts. Read and be clear on the terms. Be sure to take out auto-renew clauses. Find out when the last day of their quarter is, even the last day of their fiscal year and buy on that day, and request a larger discount.

- **Consolidate:** With your end metrics in mind, back out systems and activities to meet them. Only vet tools that contribute value to that. Considering integrations, CX, and productivity down to click level during vetting, then negotiate contract phase. Only keep tools that pass your vetting process.

Step 5: Implementation

The way you implement new tools is critical. Poor implementation is the major cause of shelfware. The solution you choose may not have the proper support for implementation. You have to own it top to bottom. Drive the vendor. Never wait on them to drive you. If the software doesn't work, after you've vetted and purchased it, it's your fault. Take full ownership of the ROI. If you find yourself blaming the vendor, you probably weren't willing to do what it took to get the value out of the technology that you first envisioned. It is possible that the vendor's technology was too poorly designed to deliver the ROI you were looking for, but you should have uncovered that during the vetting and purchasing process. Still, demand (kindly) that they clearly define successful outcomes. Discuss how to get the desired outcomes in qualitative and quantitative metrics and associate these with due dates and task owners.

Team: Ideally, someone in the company should be assigned to managing the tech stack. Of course, who that is and how many hours are dedicated depends on the size of your company and your budget. Ideally, it should be a dedicated role or dedicated number of hours for someone with multiple roles, such as a sales engineer or CRM admin. It should fall to one team and one person. Use this as an opportunity to have their bonus associated to the ROI of the tools in the stack. You may also base compensation on achieving certain milestones of the implementation and ROI.

Step 6: Repeat

If you've done steps one through five well, this should be the easy part. Simply repeat what you've done at regular intervals to make sure you still have the best and most agile tech stack available to your team.



A Note on Using Consultants

Using a consultant to help you decide the complete tech stack is not recommended. The truth is very few companies evaluate and establish their tech stack deliberately. It isn't a known and well-practiced skill set outside of the best sales operations teams. Even then an internally well-managed stack can stagnate because of budget constraints and internal politics.

If your team and/or dedicated stack manager can commit to consistent testing cycles and keep the right goals and results needed at the forefront,

then you can gain tech as a competitive advantage and will not need a consultant. This "long play" is not something a consultant could really come in and complete as a single project.

However, you may want to give consideration to using a solution-specific consultant to give training to your team on its most goal-related and helpful features. In fact, most software client services teams will jump at the opportunity to help you show value of their tools to all but guarantee renewal at the end of the billing cycle.

SUMMARY AND CONCLUSION

Before you can choose the best tech stack for your sales organization, you need to design your process, choose your team goals (based on company goals), and then look for a way technology can best help you achieve those goals and streamline those processes. Then you can set out to learn what's available.

Once you find a piece of tech, it may jive with your process, it may not. You will need to decide if you need to redesign your process to fit the tool in or look for another tool. Either way, you should use a mind-mapping tool, such as Lucidchart, to help. This simply means that your learning and improvements will be iterative. Begin with a hypothesis on what's going to work and why, then design and implement tools, then test, then refine, and repeat.

Once you're in the groove, look to expand tools that are effective. This could be to the whole team, other teams, or company wide. Don't let the idea that change could hurt your bottom line prevent experimentation. You can version tool implementation. You will work out kinks.

We believe that the best method is to manage an agile tech stack rather than the alternative, i.e., not making any changes or waiting until the perfect all-in-one platform comes along. (It won't.) You have an incredible amount of growth to gain from continually leveraging the best technologies. Next year's tech could mean the difference toward hitting your numbers. Do this right and you will crush your stretch goals.

CONSENSUS AND THE AGILE SALES TECH STACK

Since our launch in 2013, Consensus has learned things that more experienced businesses have not. Why? Because we test, test, test. We believe in the idea of repeatedly testing your assumptions about what technologies will work in your sales tech stack. They should always support your business goals and help get results. Today, many companies select technologies, implement them, and run them without ever switching them out for better tools—regardless of whether they produce results the promised. However, you should be learning continually, always testing what works and what doesn't. Be prepared to make adjustments. Switch out technologies until you're satisfied that your system is fine-tuned and supporting your business optimally.

About Consensus

Consensus is Software as a Service (SaaS) that accelerates B2B sales by driving consensus among stakeholders in the prospect's buying group. By automating custom product demos, clients have cut their sales cycles by 68% and jumped close rates 44%. Our interactive demo platform personalizes video and documents so each prospect automatically learns about a solution in the most relevant way. Our Demolytics™ dashboard helps customers discover and engage the entire buying group by gathering analytics and tracking what they watched, what's important to them, and who they shared it with. This drives consensus and gets to fast, confident purchase decisions.

To learn more about how Consensus can help you leverage your agile sales tech stack with demo automation, [click here to watch a custom demo.](#)