

How to Find the Sales Enablement Solution That's Right for Your Business

A 50-point quiz that examines your sales process and marketing initiatives to determine your software needs

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Every sales leader will tell you they want to enable their sales team– make them more efficient, arm them with the right sales content, and obviously, close more deals. But when it comes to finding software to help with that process, the situation grows far more complicated. That’s because “sales enablement software” isn’t something you buy--it’s an umbrella term that encompasses five separate technologies:

- Configure Price Quote or “CPQ” solutions
- Communication tools
- Sales intelligence
- Learning management
- Marketing automation

Rather than a one-time purchase of a software solution, sales enablement is an ongoing initiative that a company commits to in a variety of ways, including sourcing and implementing a sales tech stack that covers the aforementioned areas. Admittedly, the process of building out a high-functioning sales tech stack is no small feat.

Which is why we’re here to help.

The quiz that follows is designed to simplify the process of finding the right sales enablement solution for your team. We’ve broken it down into the five aforementioned areas to help you figure out where a sales enablement tool is needed the most. Once you’ve finished, tally your results to identify where your pain is felt most acutely. Then, we’ll provide some helpful recommendations for finding the solution that’s right for you.

If you’re ready to identify your sales organization’s most pressing enablement challenges, let’s get started.

Instructions

Each section contains 10 questions. Answer “yes” and check the corresponding box for any question that applies to you. At the end of each section, tally the number of times you answered “yes”. If you scored a 6+ in any section, move on to Section 2 to get recommendations for sales enablement solutions as well as resources to help you dig deeper into features.

SECTION 1

Proposals and pricing slowing down sales?



Are sales reps spending over 10% of their time creating custom, one-off proposals?



Do your sales reps manually enter client name, price, and deal terms when building proposals?



Do sales, business operations or customer success teams spend time searching for old contracts, proposals, and purchase orders in disconnected file storage systems?



Does sales currently create proposals using software like Microsoft Word or Google Docs and send them directly to opportunities with no formal approval process?



Have mistakes in proposals, either in pricing or in language, caused significant friction in a deal, created a legal liability, or resulted in a loss in revenue?



Are sales ops, deal desk, or management regularly reviewing one-time agreements?



Do sales reps ever engage in “rogue discounting” where they send proposals that are not approved and result in dilution of gross margin for your business?



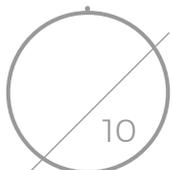
Does management have an overall lack of visibility into the price quoting, discounting and proposal building processes as they currently exist today?



Does your business have numerous offerings in its product line that result in complex contracts with multiple line items?



Have reps ever sent proposals for, or actually sold, items that were out of stock or discontinued by your organization?



TOTAL

10

SECTION 2

Can sales communicate clearly and easily?



Is sales collateral (i.e. case studies, pitch decks, white papers, one-sheeters etc.), an important lever used by reps to move deals forward?



Does your organization lack the ability to track how sales content is being used by sales reps?



Does your organization lack the ability to measure the return on investment (ROI) in sales content by tying sales content usage to closed deals and revenue?



Have reps ever created their own versions of sales content for specific deals that were unapproved and caused considerable friction or resulted in lost revenue?



Do your sales reps spend a significant amount of time searching for and selecting the right content to send to prospects to advance a deal forward?



Do sales development reps frequently send emails to guessed email addresses that result in bounced emails, impacting overall email deliverability?



Do sales development reps have low cold call connect rates and spend time manually dialing numbers trying to connect with prospects?



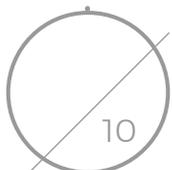
Do sales development reps currently lack visibility into what emails prospects open and respond to, and does management have reporting on this data across the organization?



Do sales and sales development reps waste time reinventing the wheel on messaging when communicating with prospects?



Does sales lack a way to easily record sales calls and import them to the CRM for review and training purposes?



TOTAL

10

Does sales have data to make informed decisions?



Do your sales development reps spend over 10% of their time performing manual internet research to find potential new business and are they entering that information into your CRM themselves?



Do sales development reps fail to connect with prospects over the phone due to lack of direct-dial information?



Do your sales and sales development reps have lower than desired activity volume due to how much research is required to personalize messaging and learn about prospects?



Do your sales reps spend time manually correcting out of date contact information that's in your CRM?



Do your sales development rep book meetings with accounts only to have your account executives take the meeting and discover that the target account was obviously unqualified?



Does management know what kind of company makes for the ideal customer in terms of size, geography, employee count, and current web technologies used?



Does sales management currently select new target accounts for outbound sales manually?



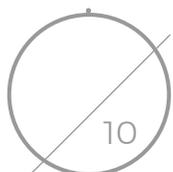
Does your marketing organization lack a way to determine the most qualified leads in its database?



Do sales reps struggle to find reasons to reach out to prospects and use manual internet research to find compelling sales triggers?



Does sales lack a system that automatically finds more accounts similar to your ideal customer, imports their information into your CRM, and assigns the accounts to reps?



TOTAL

10

SECTION 4

Is sales getting the training they deserve?



Is your current training system an informal process that is managed with spreadsheets, manual calendar invites and an de-centralized collection of content?



Is it a challenge to get your sales team all in one room at the same time to conduct in-person training?



Do your product offerings change or update on a regular basis and do you have to disseminate information about these changes to sales rep in order for them to articulate product value?



Does your sales team lack access to a central repository of shared knowledge that reflects current best practices, like a Wiki, that can be easily accessed and edited by all team members?



Are your sales reps required to receive a certification or take a qualification exam before they are able to sell your solution, like a state or federal license requirement?



Have customers returned products or canceled contracts stating that they felt misled or oversold by their sales rep?



Does your organization lack a system to pro-actively identify employees that are falling behind in trainings and certifications?



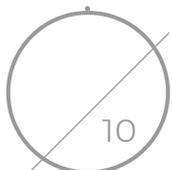
Does sales training data and sales performance data live in a vacuum that doesn't allow the two to be compared or analyzed together?



Does management lack visibility into the creation of formal courses to asses the current skills and abilities of your sales team?



Does sales training lack an established approval workflow that provides oversight for management and identifies bottlenecks in the lesson plan creation process?



TOTAL

10

Can marketing identify and nurture prospects?



Is email a primary driver of your sales process, used to help advance contacts through your acquisition funnel by educating them about the value of your category and/or your specific solution?



Does your marketing team lack the ability to nurture specific segments of your marketing database with targeted, time-based and event-triggered emails?



Does your marketing team lack the ability to quickly and easily create landing pages with forms for campaigns that capture information from website visitors to convert them into leads?



Does your marketing team lack a system to collect pieces of information about your website visitors over time in order to progressively build profiles of individual website visitors to better qualify leads?



Do your sales reps currently spend time manually inviting prospects in their pipeline to webinars and events or send them pieces of marketing content?



Does marketing lack the ability to automatically assign marketing qualified leads to sales reps in your CRM when the lead meets certain criteria or completes specific online or offline actions?



Does marketing have a process to re-engage with accounts that have stalled out with sales, or went with other vendors?



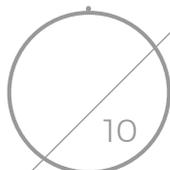
Does management lack the ability to forecast revenue opportunities from marketing qualified leads?



Does management lack visibility into marketing's direct impact on new accounts won?



Does your organization lack the ability to perform multi-touch revenue attribution for accounts won to determine where they originated from?



TOTAL

10

So how did you do?

If you scored a 6, or greater, in any of the five sections, read on.

If you scored a 6 or greater **in Section 1**, your team could benefit from the addition of a **Configure Price and Quote** (CPQ) solution to your sales stack. This category of software automates and assists the quoting and proposal process. If your reps are creating a lot of custom documents that require oversight and review, or if you're having issues with rogue discounting by sales reps, investigating in a CPQ solution may just be the thing your team needs. Important to note: CPQ solutions are technical in nature and require integration with your CRM. If you're serious about CPQ, [G2 Crowd has gathered reviews](#) from numerous users of CPQ software and aggregated them based on market size, feature set and customer satisfaction scores.

If you scored a 6 or greater **in Section 2**, you most likely need to invest in sales **communication tools** to better enable sales and marketing functions. Communication tools allow for better sales dialogue, tracking and reporting, and there are quite a few on the market. To figure out the right tools to help your team communicate with prospects more effectively, you need to take a look at your team's current inbound and outbound processes. The question to ask yourself is, "How does my sales team use communication to progress a deal through the proper stages?"

- Using calls to move deals forward? Check out G2 Crowd's collection of [outbound](#) and [inbound](#) call tracking software.
- Email outreach reins supreme? See G2 Crowd's collection of [email tracking solutions](#).
- If sales content (like pitch decks, case studies and videos) or screen sharing is leveraged by your sales team to advance opportunities to the next stage, check out [DocSend](#). It's free to try, plugs directly into salesforce, helps teams attribute sales content ROI.

Still have questions about the right tools for your team? Reach out to us at 888.258.5951 to book time to chat with the team. We'll provide market-specific insight to help you shed new light on next steps.

If you scored a 6 or greater in **Section 3**, your team would likely benefit from a **sales intelligence solution**. This category of software uses first and third party data to give your sales team relevant information, like new target accounts along with their contact information, company history and recent company news. If your sales team struggles to find new outbound accounts and doesn't have direct phone numbers or email addresses for key decision-makers, sales intelligence software could give your team the info they need to be successful. We recommend checking on [G2 Crowd's complete vendor listings for sales Intelligence](#) to get a feel for what's out there.

If you scored a 6 or greater in **Section 4**, your team would likely benefit from a learning management system (LMS) for sales. LMSs are built to allow instructors to easily create, organize and administer online and offline training programs. Sales training is a challenge, both in terms of lesson plan creation and scheduling. The right LMS can empower your sales team to pro-actively educate themselves on new products and solutions, and improve their selling skills. If you want to get a look at the current market landscape, [check out G2 Crowd's list of LMS vendors](#).

If you scored 6 or greater in **Section 5**, your organization would likely benefit from exploring marketing automation solutions. The market is made up of numerous vendors at dramatically different price points. At DocSend, we currently use [AutoPilot](#) for our marketing automation needs, but our staff has had great experiences with HubSpot and [Marketo](#) in previous roles at other companies. If you want to get an idea of the landscape, check out G2 Crowd's vendor listings to read reviews and get a better feel for what's out there before you reach out to potential vendors.

The one thing your score won't tell you. Our team understands the sales enablement space inside and out, and can provide expert advice for navigating and selecting the solution that's best for you.

Reach out if you want to make the right decision for your team: **888-258-5951** or sales@docsend.com.