

WHITE PAPER

# Experience the Freedom to Thrive

With a streamlined and effective modern sales tech stack

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High-growth companies that are thriving today are doing so because technology-enabled sales processes are productive and generating revenue. Discover how you can identify the applications that keep your sales team focused in an ever-changing business development landscape.

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# Focus the sales tech stack to increase productivity and improve outcomes

## See how a harmonized stack can help the most vital roles in the sales process

The sales technology stack has grown exponentially in recent years. Sales teams are living in an overly complex technology environment of their own creation. Like every other team in an organization, sales is subject to application sprawl. According to Gartner, it's mayhem in sales tech.

Instead of spending money on technology intended to increase efficiency and improve productivity, sales teams are spending money on the wrong technology that's damaging their productivity and outcomes.

Applications that silo data, lack integration options, and require too much time switching back and forth to accomplish basic sales tasks (e.g., responding to buyers, composing proposals, communicating in preferred channels, etc.) are doing more harm than good.

### **Streamline, enable productivity, drive outcomes**

Happy sales teams get more done. When technology becomes more hindrance than help, sales teams are not happy. It's time to evaluate the sales tech stack and cull what's not cutting it.



# The problem: Sales productivity is at risk from a sprawling tech stack

## Is it helping or hindering sales outcomes?

Three of the 39 reasons [Gartner](#) cites for mayhem tie in directly with companies' need to cull their unproductive, results-defying applications:

### “The mayhem is a result of the bull market in sales tech”

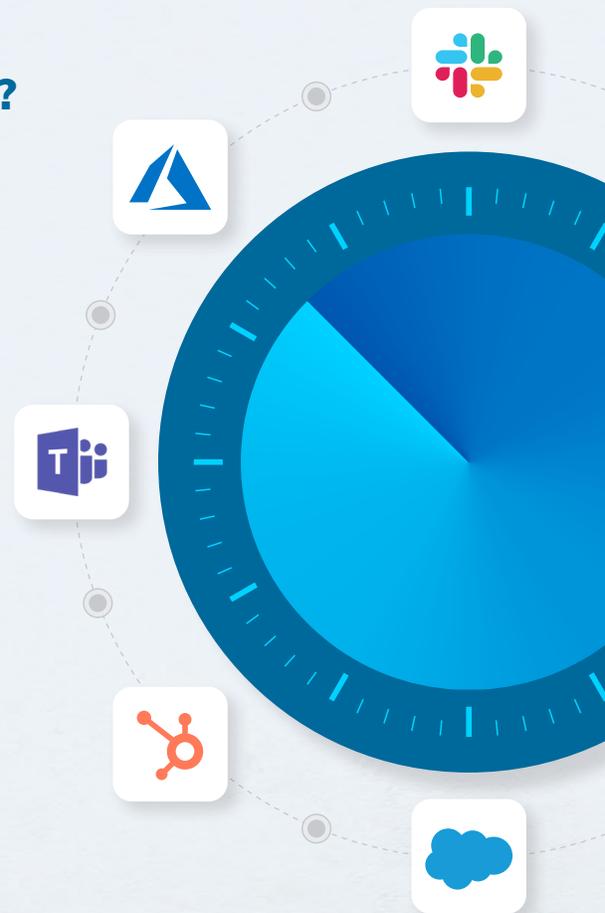
Promises of visibility, data management, greater productivity, and increased efficiency make technology inviting. Sales leaders want to buy, but are they causing more problems than they're solving?

### “Creating products the reps actually like / love / have-to-have versus products that help management”

Another layer of reporting will frustrate account executives. More siloed content will add time to presales engineers' responsibilities and force proposal managers to wrangle version control and accuracy. Lack of results will drive sales leadership to question the need for the application. Who are organizations buying for and why?

### “The rise of the invisible UX in sales tech, that is, a user experience that is seamless to sales reps processes”

The sales tech UX is real, and every application in the stack needs to prioritize how it improves that UX. If the application is not improving it, then it should be re-evaluated as to whether it's necessary.



*At least 60 minutes of the rest of a sales professional's day may be spent toggling back and forth between applications.*

– Ring Central,  
“App Overload is a Problem.  
This is Why it Matters.”

# More money might not mean more wins

There's more to it than identifying applications that sales teams use the least and then removing them from the stack. The problem is that organizations are spending too much money to produce the same results. As sales tech stacks have exploded in complexity, struggling organizations have lost sight of what's important. Rather than overlapping features and functionality, the focus has to remain on developing relationships and solving problems. Yet, salespeople only spend a third of their day talking to prospects. At least 60 minutes of the rest of a sales professional's day may be spent toggling back and forth between applications.

## It's getting harder for salespeople to focus on the basics

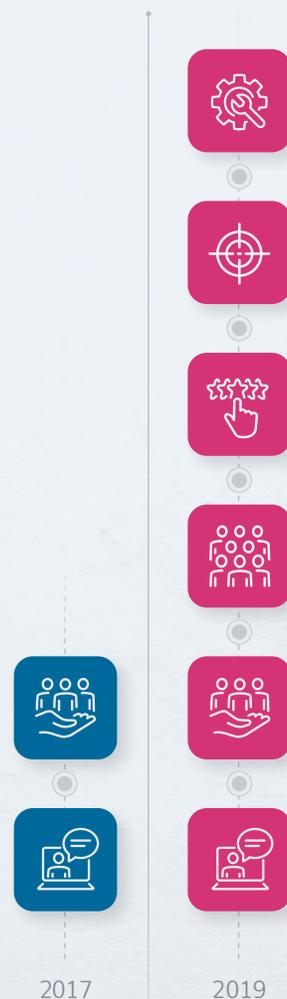
*More than half of respondents went from using two types of sales tools in 2017 to using six types of sales tools in 2019.*

—Smart Selling Tools, “2019 Sales Tech Benchmark Survey”

That's only part of the story. The median number of sales tools (the number of tools used by the largest number of respondents) was 9, which a majority of organizations are spending more than \$150 per user per month to access.

Despite the rapid growth in technology, most account executives still start a proposal from scratch. Presales engineers address the same challenges over and over again. Proposal managers search for the same content and chase the same authors and reviewers to create a response. And sales leaders wonder what they are getting out of their monthly investment in 9 sales tools per user.

## Average sales tools used



# The solution: Identify each sales role's ideal outcome from the tech stack

## It is possible to make everyone happy

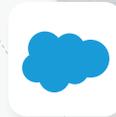
Implications from a bloated sales tech stack trickle down to the entire sales team. Account executives feel that their ability to meet quota is compromised. Presales engineers feel like their innovation is stifled. Proposal managers feel like requests for proposals (RFPs) and other requests are devalued and too easy to overlook. Sales leadership feels like they're spending too much money on resources that are forcing sales teams to work harder to achieve the same outcomes.

From the top of the funnel to the bottom, sales leaders, account executives, presales engineers, and proposal managers must evaluate the sales tech stack to make sure it's enabling productivity and delivering desired outcomes.

*Organizations that successfully operationalize their sales technology can benefit from an up to 20% revenue increase.*

— Forrester, “Q2 2019 Global Sales Enablement ROI Survey”

Knowing that application sprawl exists and distracts sales teams from success is half the battle. It gives organizations permission to dig in and examine how different sales roles interact with the tech stack. Doing so results in many benefits, which are detailed according to perspectives of account executives, presales engineers, proposal managers, sales leadership, and the organization as a whole in the remainder of this white paper.



# Account executives want a quota-meeting, outcome-pleasing stack

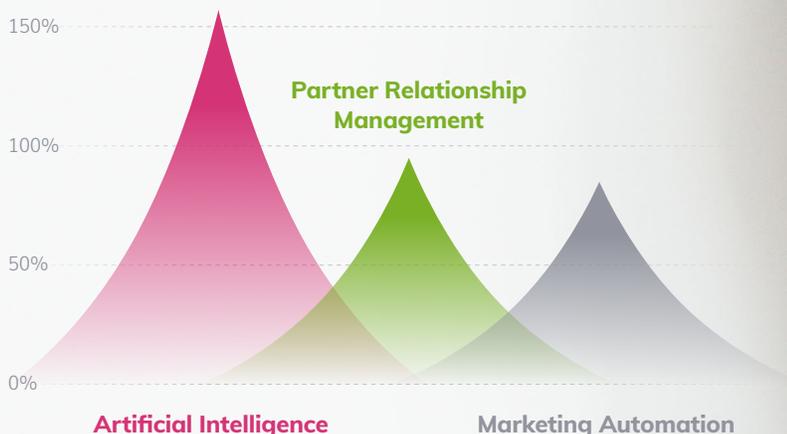
## It's how they stay focused on relationship-building

Only 24.3% of salespeople exceeded their quota in 2019. Account executives not only need to meet quota, they want to depend less on other people to do it. Dependence on other people costs account executives time, leverage, control, and—in worst-case scenarios—a successful close. They need their tech stack to give them the freedom to work without limits.

Applications must provide access to updated, verified content, the flexibility to communicate with prospects through the prospects' preferred channels, the ability to build personalized proposals quickly, and the power to collaborate with their entire support team—from presales engineers to contracts to legal to IT.

### The top three anticipated sales technologies

– Salesforce, “State of Sales 3rd Edition”



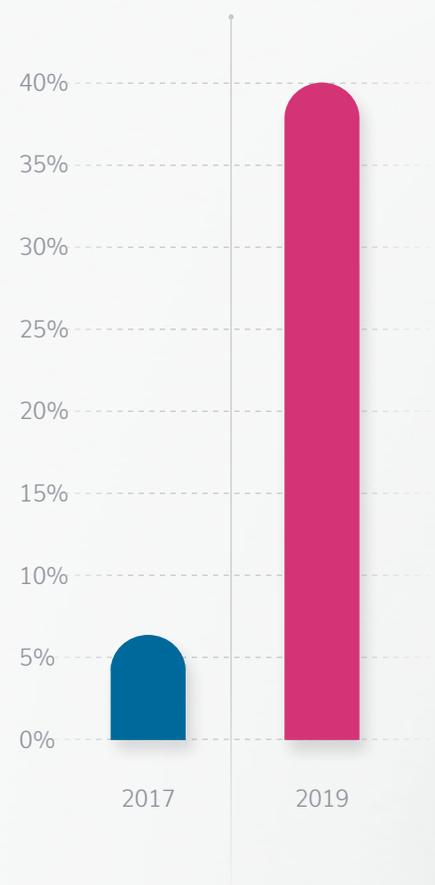
# Where can AI-enabled automation help?

According to "State of Sales 3rd Edition" by Salesforce, the top three anticipated sales technologies are AI (153%), partner relationship management (91%), and marketing automation (86%). Imagine, for example, not having to wait for a security team to complete a security questionnaire, a step that can end up delaying sales cycles by up to 7.8 weeks. Instead, the questionnaire gets completed through AI-enabled automation, based on responses to past questionnaires, and then only needs approval from the security team. Even if security subject matter experts need to complete a few answers that have never appeared in the past, the wait will be much shorter than emailing it into a void and hoping it shoots to the top-priority spot of a security expert who is already overwhelmed.

If account executives could complete 80% of every request for proposal (RFP) through automation, then how much time could they re-invest in revenue-generating activities such as personalizing responses, building relationships, and ensuring high-quality demos?

Organizations that want strategic partnerships with their vendors will expect more than being able to check all the technical boxes. It's up to the account executive to make sure their organization's soft skills—the human factors—shine through, and the only way they can do that is by giving them the freedom to thrive through their sales tech stack.

Sales enablement usage



*Sales enablement jumped in usage from 6% to 40% and enjoyed the highest satisfaction rating of any sales tool category.*

– Smart Selling Tools, "2019 Sales Tech Benchmark Survey"

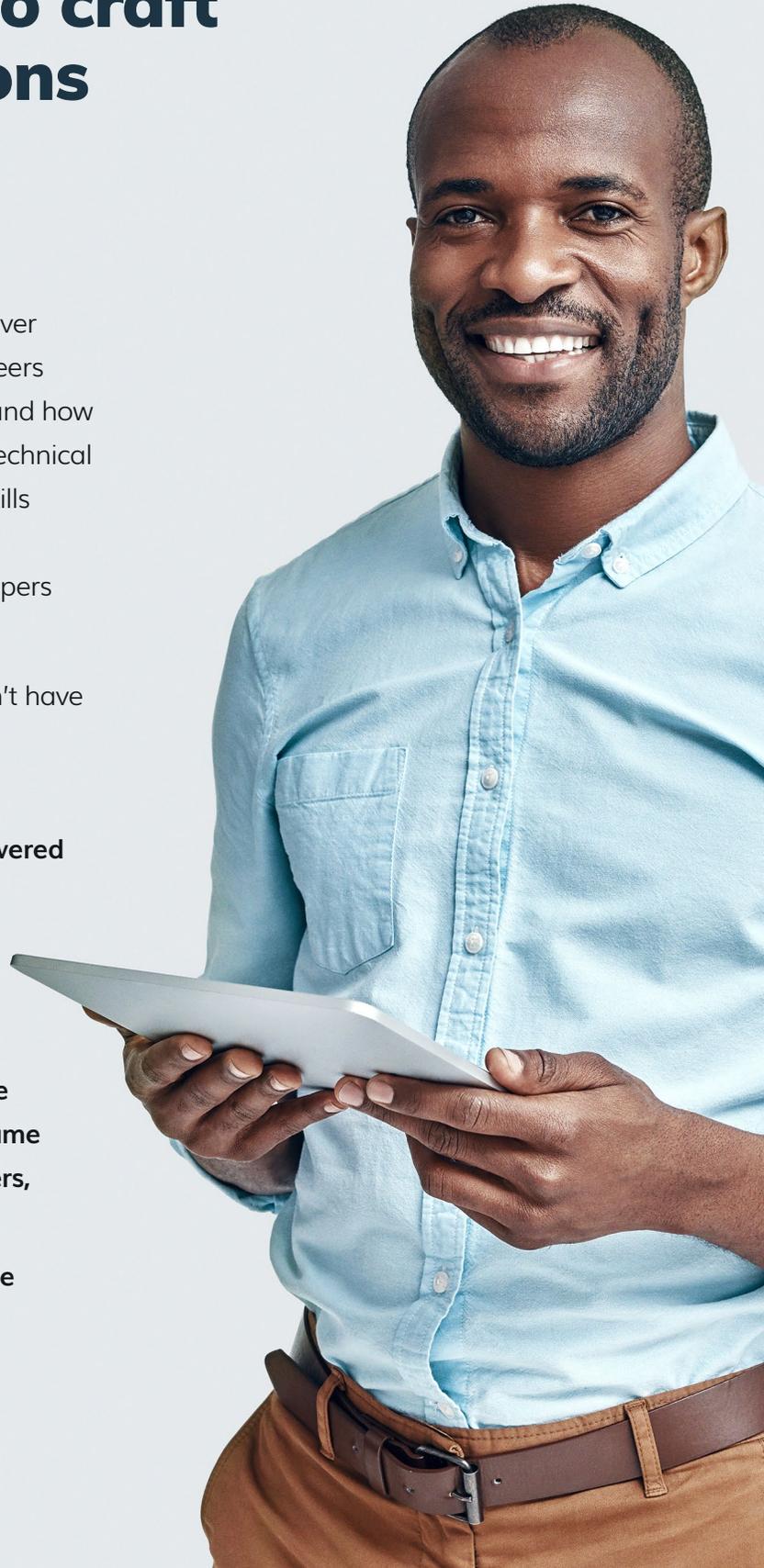
# Presales engineers want more time to craft innovative solutions

## They thrive on creativity and problem solving

Armed with technical minds and a desire to deliver solutions that dazzle customers, presales engineers care most about an application's functionality and how it enables them to succeed. This rare breed of technical mastery combined with superb interpersonal skills depends on clear collaboration with account executives, proposal teams, and product developers to build trust with prospects.

With application sprawl, presales engineers don't have enough time to focus on delivering innovative solutions. They spend too much time:

- Responding to RFP questions they've answered over and over again
- Responding to prospect emails with the same answers they've provided to past prospects, multiple times
- Responding to customer emails to assuage concerns after implementation with the same answers they've provided to past customers, multiple times
- Hopping on sales demos to re-demonstrate functionality



Presales engineers want space to be creative with their technical and interpersonal skills. Offloading repetitive tasks to AI-enabled automation provides them that space.

- **What if account executives or associates were empowered to respond to emails and handle some demos based on content that engineers have created in the past?**
- **What if proposal managers could answer RFP questions through automation by referencing a dynamic, always-up-to-date content library?**
- **What if customer support could reference new customer communication, content, and context all the way back to the top of the funnel to make sure customers are getting what they want?**

## Put subject matter expertise to work for sales

Knowledge management functionality in the sales tech stack may be the single greatest contributor to the presales workflow. It impacts how presales engineers build solutions and demos, how they collaborate, and how they interact with customers. For example, dynamic content libraries enable 84% of RFP software users to spend more time personalizing proposals for specific use cases.

Focus the sales tech stack on applications that help presales engineers use their innovative minds to create custom solutions for customers. Free them up to apply more time to developing better content that produces more positive outcomes. Their increased productivity will pay off for the whole sales team in efficiency and customer experience dividends.

*Dynamic content libraries enable 84% of RFP software users to spend more time personalizing proposals for specific use cases.*

**–2021 Benchmark Report: Proposal Management**

# Proposal managers want in on the revenue-generation game

## And improving response quality will get them serious playing time

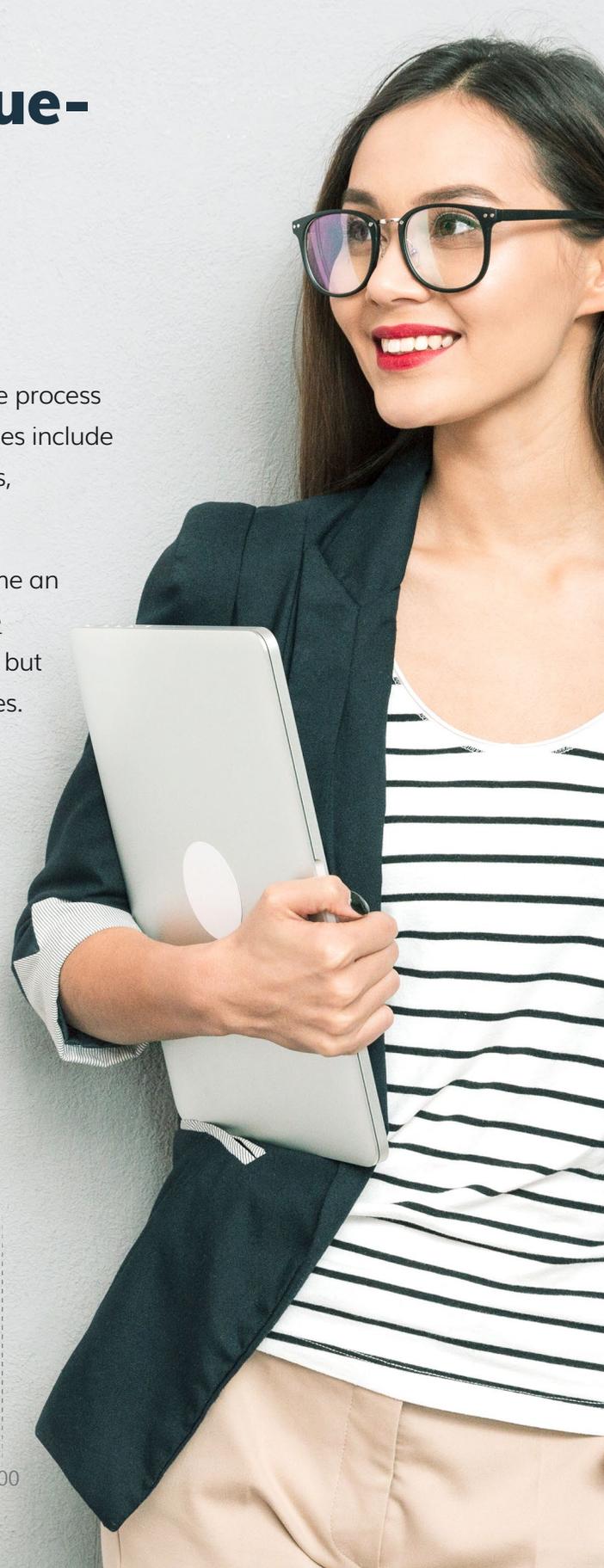
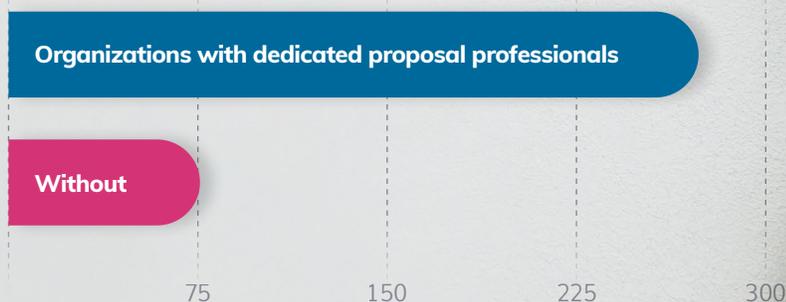
Win rates are important to proposal managers, but so are process improvements and efficiencies. For them, positive outcomes include internal team satisfaction, reduction of rework or revisions, compliance, and distinctiveness of proposals.

With the right sales tech stack, proposal managers become an impactful source of revenue. Trillions of dollars of revenue is won through competitive proposal processes each year, but companies spend billions per year on lost bid opportunities.

The value of dedicated proposal managers is undeniable. Organizations with dedicated proposal managers submitted 3.5x more responses to RFPs in 2020 than those without. Combine that with the value they add to sales processes with regard to knowledge management, proactive proposal creation, and content development and it becomes clear how intertwined in the sales tech stack proposal managers need to be.

### Number of RFPs submitted annually in 2020

– “2021 Benchmark Report: Proposal Management”



Proposal managers enforce the structure of an organization's response process while enlivening that process with excitement and urgency. According to Steve Silver of Forrester Research, "With the right process steps in place, the team can create high-value proposals that include transparency into revenue potential, full contract value, and contract costs."

## Integrated teams require integrated software

The efficiency and effectiveness of the response process—as with any sales enablement process—will be defined by the technology tools available to proposal managers.

- **What if account executives only had to be involved to personalize content and submit a proposal developed by proposal managers based on a comprehensive content library?**
- **How much time and effort can be saved for presales engineers if they only need to review content for accuracy and can be automatically pinged by a system when it's ready for their review?**
- **How much faster can pipelines grow if sales leadership has greater visibility into responses, what's working, what's not, and with whom the organization wins most often?**

Only response management software produces these outcomes. Like any other application in the sales technology stack, it has to integrate seamlessly with the rest of the stack and improve workflow productivity for all sales enablement players while avoiding redundancy with any other applications.

*With the right process steps in place, the team can create high-value proposals that include transparency into revenue potential, full contract value, and contract costs.*

– Steve Silver,  
Forrester Research

# Sales leaders are awash in constant change

**Give them the visibility and assurance they need to stay afloat**

Sales leadership wants teams to have the right tools to be successful. Change management risk often tempers their exuberance to fulfill team needs, but when legacy applications lose their luster, competitive-lag risk quickly overrides change management risk.

For example, AI-enabled applications have been hot commodities in the sales tech stack as of late.

*High performers were 4.9x more likely to use AI than underperformers.*

– Salesforce, “State of Sales 3rd Edition”

If the sales tech stack isn't under constant scrutiny, then it's in danger of underperforming.



## Use the stack to help retain team and talent

Leadership also recognizes the close tie between an optimized sales tech stack and sales team retention. Remote work is on the rise. Business travel is in decline. Pandemic-fueled evaluations of work-life priorities has revealed that it is indeed possible to be successful in sales while working remotely.

Gartner found that 23% of CSOs report plans to permanently shift field sales to virtual sales roles. Recruiting and retaining talent will depend on how easy it is for salespeople and their supporting teams to be successful from anywhere using the technology that leadership provides them.

## The customer experience will always be priority #1

According to Gartner, "From an end user perspective, delivering a high-quality experience to customers at scale is the No. 1 priority in sales organizations today." Sales leadership's role here is to provide guidance, focus, and support. Any application included in an organization's sales tech stack must have the backing of sales leadership, and, preferably, an executive champion, according to Steve Silver at Forrester.

In order for account executives to meet quota, presales engineers to develop innovative solutions, and proposal managers to create high-quality responses, sales leadership has to be accountable for the sales tech stack. Which means leadership must recognize the stack's strengths and shortcomings and be ready to add or subtract from the stack when productivity lags or outcomes go unrealized.

*Any application included in an organization's sales tech stack must have the backing of sales leadership, and, preferably, an executive champion.*

*– Forrester Inc., "Building the Business Case for Sales Technology"*

# How can the organization benefit from a streamlined sales tech stack?

## Role-based advantages add up to better outcomes for everyone

### Democratize knowledge

Successful sales organizations champion knowledge sharing to increase the speed, efficiency, and effectiveness of their teams. Advanced content management technology can help ensure that vital knowledge is retained and easily accessible to both end users and third-party applications.

All end users who work in the sales tech stack rely on content and context to successfully attend to their responsibilities. From initial conversations to demo recordings to completed proposals, the details that emerge will determine the success of the transaction. Feature demands, stakeholder needs, decision-maker requirements, contract concerns, and more lurk in all that content. If applications in the sales tech stack don't integrate seamlessly with each other, then tracking all those details becomes a manual task for end users. And manual tasks leave more room for error.

#### Account Executives



Give them everything they need without relying on someone else.

#### Presales Engineers



Enable them to innovate the optimal solution.

#### Proposal Managers



Help them create responses accurately and efficiently.

#### Sales Leaders



Give them visibility into the whole sales process.

## **Avoid SaaS licensing structures that limit collaboration**

Limiting user access to applications is akin to pouring a round concrete foundation: the silo doesn't exist yet, but it's coming. However, some user licenses can be so expensive that organizations have to weigh the importance of providing access to end users who may only need passive access to a subset of features. Organizations must find a way to affordably provide access to tools every user needs to optimize their production without limiting their visibility into communication, data, or content that can be helpful.

## **Win with data**

Leading SaaS solutions have versatile reporting features that offer actionable insights for both sales leaders and team members. The ability to customize reports is essential to ensuring that their data illustrates the metrics that are most relevant to the organization's business model. Anecdotal evidence such as feedback from end users can help, but, ultimately, decisions should be based on metrics such as leads generated, demos delivered, proposals submitted, and, of course, deals closed.

## **Enhance job satisfaction and the buying experience**

End users will appreciate a comprehensive effort to minimize application sprawl. Gone will be the perception of haves and have nots. The blame game for responsibility and accountability can also be curbed because there will be fewer overlaps of application functionality. Tightening up the sales tech stack reduces uncertainties of who owns what in the sales lifecycle. The byproduct will be a more seamless buying experience, where content and context follow prospects from the top of the funnel all the way through to the bottom of the funnel, where it drains into customer onboarding.

## **Minimize security risk**

The more applications in a sales tech stack, the greater the exposure to risk. Applications require data to fuel their processes, which means every application has access to customer and proprietary information that vendors are expected to protect and keep private. Human error continues to be the primary cause of data breaches (88%), which means that too many applications being used in a sales tech stack exposes end users to too many opportunities that risk compromising data.

# If everyone is satisfied by outcomes resulting from sales enablement tools, then...

## Expect the biggest payoff from those that are AI-enabled

In a one-year span, sales enablement tools (primarily content management tools) increased in usage by 567%, from 6% to 40%.

For sales enablement technology, Gartner recommends that organizations, "Build a stack to drive scale, automation, and efficiency." It should include conversation intelligence, sales content management, sales readiness, and real-time knowledge.

As applications in the sales tech stack become infused with artificial intelligence, organizations will need to look beyond how the stack performs to how it learns and adapts. Applications not powered by AI risk growing stagnant quickly, especially since application vendors are competitively chasing new opportunities to disrupt stagnant processes with AI-enabled insights.

Moving forward, thriving sales teams will invest only in new applications that—according to Silver at Forrester—provide increased productivity, associated revenue gains, cost savings or cost avoidance, risk avoidance, and increased customer satisfaction. But why not hold existing applications to the same standard?

Forecasted outcomes will have to adjust as customer expectations evolve, work environments virtualize, and application innovation accelerates. The sales tech stack will need to be in a constant state of optimization to align with those adjustments. Otherwise, organizations will be infringing upon the sales team's freedom to thrive.



*Build a stack to drive scale, automation, and efficiency.*

—Gartner, "Sales Enablement Framework"

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RFPIO creates technology solutions that drive sales productivity and improve sales outcomes. Recognized by G2 as the "Best RFP Software," RFPIO infuses artificial intelligence into sales response processes. From creating proposals to activating company knowledge, and from near-real-time access of a curated content library to the collaboration and project management tools that tie it all together, RFPIO strives to enable happy sales teams.

**To learn more about RFPIO, [visit rfpio.com](https://rfpio.com), or [schedule a demo](#).**

