How to Navigate the Sales Technology Landscape

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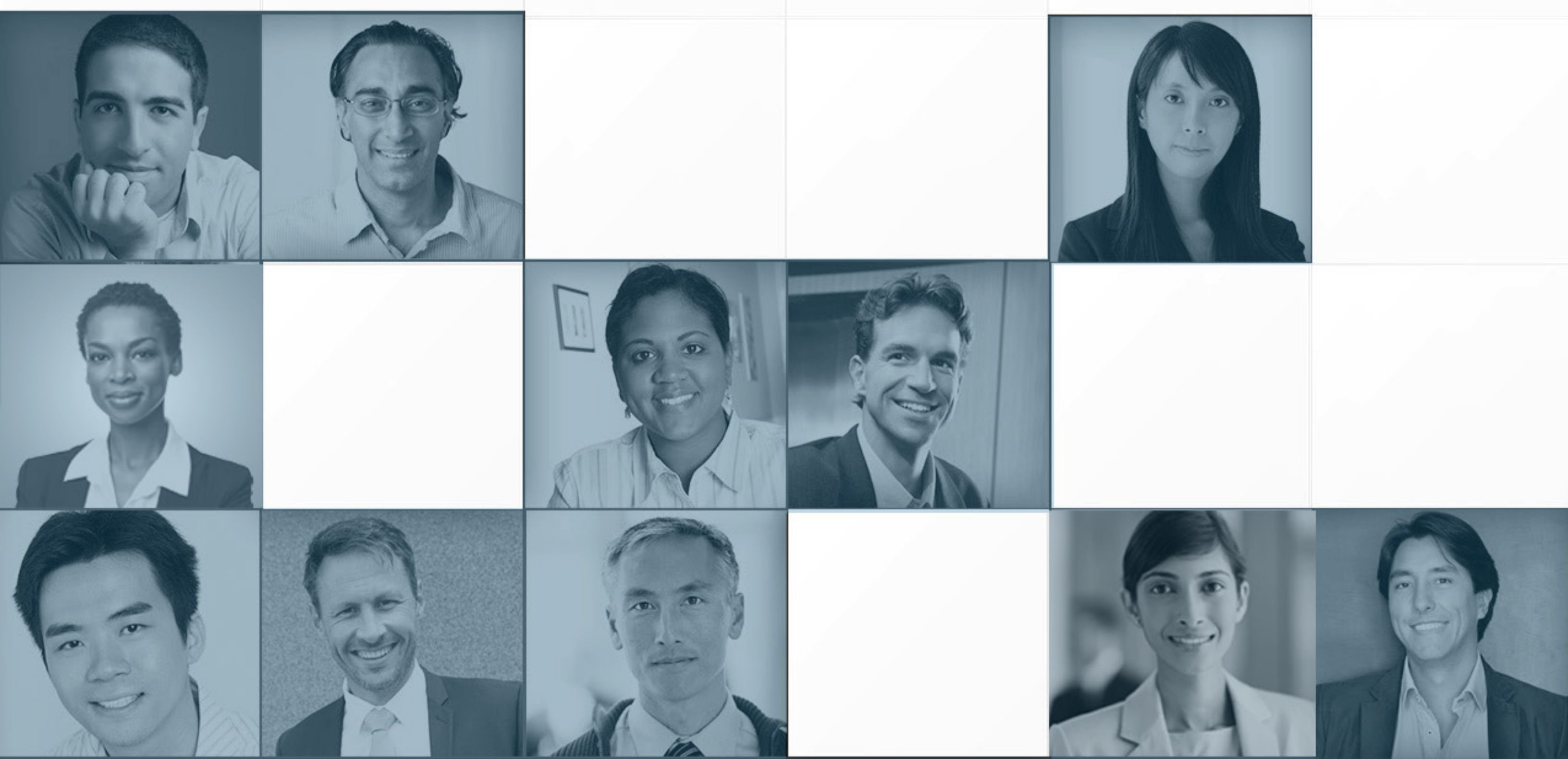

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Introduction

What is Sales Technology?

"Sales Technology" is a broad term, covering a wide range of software used by salespeople (including SDRs, Account Executives, Sales Managers, and Sales Operations) during the different stages of the sales process. Typically, sales technology begins where marketing automation and lead generation end, once a lead or opportunity becomes sales-qualified.

About This Report

The Sales technology landscape is heating up—it's highly fragmented, contested, and changing, making it difficult for buyers to navigate. Our goal with this report is to help prospective buyers understand the landscape in preparation for building their sales stack. We help buyers orient themselves around the tools that can best meet their needs by identifying leading vendors and investigating market trends.

We interviewed users, experts, and vendors about the evolution and shape of the space, the value of sales tech, and how to build a sales stack. Based on what we learned, we've produced a set of 7 tips for buyers, a landscape overview infographic, a breakdown of the major functional categories and keywords, and a detailed discussion of sales tech trends, in order to bring buyers into conversation with experts, vendors, and their peers.

The infographics in this report provide a view of the main vendors in each niche, as well as where vendors span multiple feature sets and/or stages of the funnel. We organize products by primary user role or stage of the funnel, as well as by feature-set.

We'd like to thank everyone that contributed to this project, especially the Sales experts who offered their invaluable lens on the landscape. Shout out to Nancy Nardin, Craig Rosenberg, Tamara Schenk, Jill Rowley, Barbara Giamanco, Craig Elias, and Janice Mars for sharing your knowledge and expertise! In particular, we'd like to acknowledge Nancy Nardin for the research she has done around sales technology and buying cycles, and for sharing her SmartSellingTools survey report, "2015 B-to-B Sales Tools: Consideration, Acquisition & Performance," with us.

As always, we'd love to hear your feedback on the report.

Emily Sue Tomac
Research Associate,
TrustRadius

7 Factors to Consider as You Build Your Sales Stack

Key Findings & Tips for Buyers

Here is a summary of our key findings, along with advice on what buyers can do to address some of these considerations. This list provides a frame of reference for buyers around hot topics in the space and suggested questions to ask during product evaluation. Note that the topics on this list are covered in greater detail in the Market Trends and Categories & Terms chapters of this report.

1. Sales organizations, especially at high-growth/tech companies, are breaking up the sales process into discrete activities performed by dedicated roles.

This trend towards specialization, especially the emergence of Sales Development Representatives (SDRs), has inspired vendors to offer software tailored by role, designed to further maximize efficiency.

TIP

If you are trying to scale a team of SDRs or Inside Sales Reps, which move at high velocity and tend to have fast turnover rates, look at vendors that offer integrated prospecting intelligence, email, dialer, and/or guided selling features like coaching/playbooks. Your specialization strategy will become inefficient if time to onboard outweighs the tenure of the role, or if your reps become disorganized managing a high volume of prospects. See section 1.1 under Market Trends to read more about the benefits of specialization, and explore its relationship to fragmentation in the sales tech landscape.

2. User adoption and demonstrable ROI are very important for new sales tech. However, they seem to have an inverse relationship.

The tools that have the fastest, clearest impact on an organization's bottom line are not necessarily the tools reps can start using quickly and easily, and vice versa. This is somewhat of a Catch-22, which has caused a divide in the language vendors use to market their products. Tools geared towards individual reps and sales managers are often described as productivity solutions, whereas tools branded for leaders and ops are usually called Sales management, performance, revenue, or acceleration solutions. Buyers focused only on immediate, hard ROI tend to shy away from "productivity tools," and may miss out on low-friction opportunities to improve Sales KPIs. To learn more about market conditions and buyer considerations around user adoption and ROI, check out section 2 in the Discussion of Market Trends.

TIP

If a vendor's messaging focuses on ROI, ask about time to deploy and potential obstacles to adoption. If a vendor's messaging focuses on ease of adoption by individual reps, ask about how to show ROI for the tool. Defining clear goals before you buy can help you be successful with both adoption and ROI—if reps understand how new technology will make it easier for them to meet the expectations of leadership, there's a higher chance that they will adopt the tools and meet those expectations. The most successful sales tech use cases are mutually beneficial.

3. Integration is a key consideration for Sales tech experts and users.

Experts and users advise that best-of-breed features are less important than how well the pieces of your stack work together. Turn to Market Trends section 4.2 for a more complete user discussion about integration and sales stack investments.

TIP

New sales tools should integrate with your company's CRM, other sales software, and potentially Marketing/ Finance software, depending on what kind of data they use. For tools that will be used by sales reps, make sure to get reps involved in demos of the UX, which should be integrated into the applications (CRM, email, browser, etc.) they already use.

4. Beyond CRM, there is no single "right way" to build your sales stack.

But experts and users did say the best approach is to clean up your sales process first, and take deployment of new tech one tool at a time. They also recommended a few places to look first: CPQ, sales email tools, and sales intelligence software, which are now must-haves across many different types of sales operations. Section 3 of the Discussion of Market Trends contains more expert insights, trends, and considerations for building your Sales stack.

TIP

Look for tools in these areas that strike a balance between automation and personalization. Ask vendors about specific features they have to support personalized messages or quotes. Also ask about their philosophy around automation, and what kind of results their customers who use automation features are seeing, in terms of time saved, data cleanliness, and response rates.

5. Predictive sales analytics and account-based marketing (ABM) are areas to watch.

Both facilitate the alignment of Sales and Marketing, and according to experts and vendors early adopters are seeing promising lifts in conversion and revenue efficiency. See section 3.4 under Market Trends for more information. Sales content software also helps align Sales with Marketing, around branding and messaging. Some advanced products include a predictive or prescriptive element: a recommendation engine that matches opportunities with best-fit content. These three categories are quickly gaining traction, although they require more buyer education and, in the case of sales content tools, more internal resources to maintain. See section 3.1 for reviewer perspectives on sales content tools.

6. Vendors are starting to offer broader, bundled solutions, through new feature builds and acquisitions.

This is a strategic play in response to buyer behavior—compared to other departments, Sales does not have an established practice of evaluating and investing in new technology, and budgets are limited. Enter the attractive one-stop-shop value proposition. Based on our conversations with users, sales buyers do want to limit the number of tools they invest in, but the notion of a fully functional all-in-one Sales Platform is somewhat premature. Most organizations are still using myriad sales tools to meet their needs. The Trends section 4 looks more in depth at both sides of this issue.

TIP

Vendors will be excited to tell you about their latest innovations and their product roadmap, but it's important to ask them about history, because a product's first features are usually its strongest. Before talking with vendors, determine which features you need most, and how complex your requirements are for those features. Select a product that already has a majority of their customers using those features that are most important for your use case.

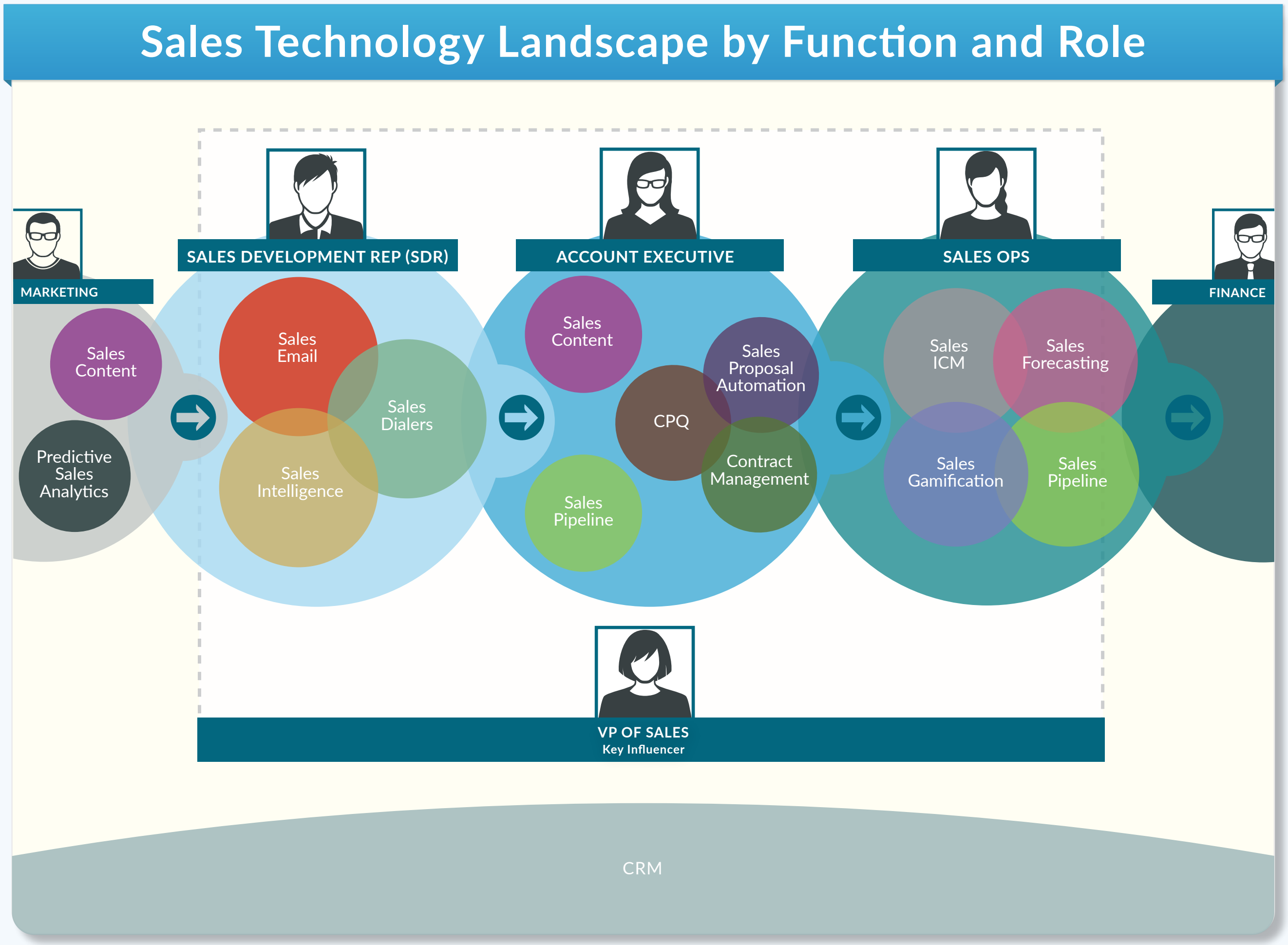
7. Buzzwords like "sales enablement" and "sales acceleration" mean different things to different users, experts, and vendors.

As software category labels they are rather ambiguous, and don't really help buyers compare products with similar functionalities. Several experts and vendors said they are beginning to avoid these labels, because they find them too confusing or misleading. (We don't use these terms as category labels in this report. For reference, we've found that "sales enablement" is most often related to sales content and training, whereas "sales acceleration" is most often related to automation and workflow tools. Reference Sales Tech Categories & Terms for more information.)

TIP

In addition to asking about features, ask vendors to explain which roles typically use the product—not just who benefits from it. For example, who is involved with implementation, and who is responsible for ongoing management? Who looks at the interface on a day-to-day basis? Also ask about most common competitors, or what solutions their product replaces. These questions will help you understand how the product fits in the broader landscape and whether it will meet your needs.

Sales Technology Landscape



Source: How to Navigate the Sales Technology Landscape - April 2016

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Sales Technology Landscape by Software Vendors

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Sales Tech Categories & Terms

The landscape is fragmented in two major dimensions: 1) There are many different categories or types of solutions available; 2) There are many competing vendors in each category. It can be difficult to get a handle on all of these pieces, especially where categories overlap or vendors span multiple categories. Beyond the sheer number of options, Sales tech terminology can be confusing because vendors and experts define categories (and buzzwords) differently.

As the landscape matures we expect to see simplification. Eventually, categories will consolidate and become better defined, and the most important vendors and types of software will be clearer. In the meantime, we have compiled a list of definitions based on core functionality, designed to help buyers navigate Sales tech in a less ambiguous way.

Our list does not cover every label used by experts and vendors, particularly those that describe approaches to selling rather than features—for example, we don't have categories called social selling or guided selling—but many of the tools on the overview graphic do serve those use cases. Note that we have omitted tools that are commonly used by salespeople but are not specifically Sales tech per se. You can reference our dynamic TrustMaps to find out more about eSignature point solutions and web conferencing applications, the two most frequently mentioned categories that are not included in this list.

Sales Content Tools

Sales content tools are content repositories or hubs that enable content sharing (internal and external) for sales teams. They are sometimes called sales enablement or sales content management systems. Sales content tools are frequently used to align Marketing and Sales messaging, maintain brand consistency, collaborate on sales content, and deliver content (such as presentations, white papers, etc.) to prospects during the sales cycle. Some sales content tools assist with content personalization or track content performance to make intelligent recommendations about which content to use and/or when to use it with a particular opportunity. Sales presentation software fits within this category. Products branded as sales communications solutions, which usually stress content delivery via video or presentation options, also tend to fit here. Sometimes sales content tools pair internal education capabilities with external educational materials.

Implementation & Ownership

Some sales content software is designed around Marketing-led content creation—assets are fed by marketers into a central database for their sales teams to send out—whereas other products include Sales content creation kits for reps to quickly whiteboard concepts for prospects or produce branded presentations, proposals, etc. In most cases this distinction is not black and white, but buyers should pre-determine whether Marketing and/or Sales plans to lead sales content creation in order to determine which software option will work best for their use case. Relatedly, sales content tools often include features for content collaboration, approval workflows, updating content, content file sharing, etc. These functionalities are especially useful and important for large enterprises in which branding politics are more complex and messaging is more tightly controlled.

Key Benefits

» Increased Sales productivity, since the sales content tool helps eliminate wasted time searching for or re-creating content.

» Decreased onboarding time and an accelerated sales cycle, due to content recommendations and automated on-the-job coaching.

» Improved Sales effectiveness by using content that is targeted and proven to work (based on previous use cases and prospect engagement/sales results).

» Alignment of sales and marketing, as the platform facilitates communication between departments and promotes current messaging.

» Internal education about products and services, in addition to sharing content externally with prospects or customers.

Further Resources

You can explore user reviews and ratings of sales content tools like Brainshark, ClearSlide, Bloomfire, and others on our website. Or, to learn more about sales content software features and capabilities, visit the full category description here. You may also be interested in content personalization and content marketing tools for ABM, particularly products such as Docurated and Seismic that connect Sales with Marketing content.

Predictive Sales Analytics Tools

Predictive analytics involves using big data about past events and current circumstances to predict what will happen in the future. Predictive analytics has a number of business applications, including the optimization of sales and marketing. It is a new software category, so the space is not yet clearly or consistently defined, this will change as adoption increases and the technology becomes more refined. Currently, predictive software for the purpose of optimizing sales and marketing is referred to as predictive sales analytics, predictive marketing analytics, or predictive analytics for sales and marketing. Depending on the product, use cases can include prospecting, lead scoring, forecasting, pipeline management and opportunity prioritization, content recommendations, and determination of the ideal customer profile(s).

Implementation & Ownership

Although often classified as either a sales or marketing tool, its predictions are relevant to both teams. In order to be most effective, predictive sales analytics—in particular predictive lead scoring and opportunity qualification—requires the alignment of Sales and Marketing. For some companies, this means a big shift in pipeline strategy. Note that vendors have made significant progress in reducing implementation time as well as "time to value"; however, representatives from Sales and Marketing Ops usually both need to be involved in setting up the models.

Further Resources

Read the full category description here to learn more, or check out our interviews with leading vendors EverString, Infer, 6sense, and Lattice Engines.

Inside Sales / Sales Development Software

This is a group of software products most often used by high-velocity inside sales teams, who engage with prospects and customers through phone and digital channels and are typically responsible for developing the sales pipeline with early funnel sales touches. It includes sales email tools, sales dialers, and sales intelligence software. Vendors like SalesLoft, InsideSales.com, and KiteDesk offer cloud products that combine multiple functionalities to cater to SDRs. Note, however, that sales email tools, sales dialers, and sales intelligence tools can also be used by AEs and other roles, and that SDRs may sometimes also use (or benefit from) sales content tools, quote-to-cash solutions, pipeline tools, and other software.

Sales Email Tools

Sales email tracking and template features typically comprise the foundation of sales email tools. Sales email tracking software places a tiny 1x1 image pixel in sent messages (not visible to the naked eye). This pixel provides information to the sender about when and where and when an email is opened, how many times it is opened, on what type of device, etc. Basic tools track individual emails and alert users when an email is opened. More advanced tools integrate with users' CRM systems and allow users to automate follow-up messages and schedule emails to send later. In addition, they may be able to track recipients' engagement with email attachments, links, and presentations, and may be able to report on aggregate email tracking results and analyze trends or make recommendations. When attached to a contact or account CRM record, sales email tracking results may provide activity-based sales intelligence around prospects' interests and engagement history. For example, Yesware offers a Presentation Tracking feature (per page, per user) that can sync engagement metrics to Salesforce, Tout Analytics tracks prospects across sales content, website, and email activity, and Outreach 360 View monitors activities and makes algorithmic recommendations about how and when to reach out.

Common Integrations

The most important sales email tool integrations are to the user's CRM system and email client (usually either Gmail or Outlook). They may also integrate with a sales dialer or VOIP system for click-to-call functionality. Note that many vendors in this space are building out additional features and integrations around sales performance management, sales content, predictive analytics, and/or guided selling.

Further Resources

You can find information about free email tracking software, as well as a discussion of the difference between sales email tracking and email marketing or marketing automation software, on our site here. You can also compare user reviews and ratings of Yesware, Cirrus Insight, and HubSpot Sidekick, or explore other sales email tools. For a more in-depth vendor perspective on this space, check out our full interview with Yesware.

Sales Intelligence (SI)

Sales intelligence (SI) refers to technologies, applications and practices for the collection, integration, analysis, and presentation of information to help salespeople keep up to date with clients, prospect new data, and drive business. It's a form of business intelligence for sales, and is primarily relevant to B2B sales cycles. All sales intelligence solutions help aggregate information about leads in order to make salespeople more productive. SI tools may, but do not always, address these use cases: prospecting for new contacts, augmenting contact records with missing information or company and industry details, qualifying and prioritizing leads, creating lists, and tracking email and website interactions on lead records. The core function of SI software is to present contacts alongside contextual information, so that reps can identify suitable prospects and tailor their messaging to the needs and interests of a specific account.

Key Benefits

» Accurate and up to date sales lead information; saves time on data entry.

» Helps salespeople figure out where and when to focus their energy.

» More efficient, relevant sales efforts.

» Better customer relationships and higher sales rates.

Further Resources

Find out more about the major use cases and compare leading SI tools with our dynamic TrustMap here. Or. you can drill down into user feedback around specific products like InsideView, ZoomInfo, Lead411, Data.com, Hoover's, DiscoverOrg, and others.

Sales Dialer Software

Automatic dialers, which may include software and hardware components, are a type of sales acceleration technology used primarily by SDRs/Inside Sales teams. They are tools that automate the process of calling a list of contacts. These replace the manual dialing of phone numbers for the sake of efficiency and accuracy, and are operated by the salespeople "making" the calls. The category includes predictive dialers, power dialers, and preview dialers, which approach dialing in different ways. Some vendors focus on one approach, whereas others offer multiple products or products that combine dialing components.

Components

» Predictive dialers call multiple (often three) phone numbers at once, on separate phone lines. The goal of predictive dialing is maximum process efficiency. Predictive dialers optimize sales calls by using the probability of Sales availability and the probability of the call being answered to determine the dialing rate and/or which numbers to dial. The system only connects a salesperson to the call after a live speaker has said, "Hello."

» Power dialers take a slightly different approach, targeted to address some of the pain points associated with predictive dialing. Power dialers call one phone number at a time, but if the call is not answered by a live speaker, the software automatically moves on to the next number on the list, without any action on the part of the salesperson. If the salesperson encounters an answering machine, most power dialers have the ability to "drop" a pre-recorded message and simultaneously move on to call the next number on the list.

» Preview dialers includes sales intelligence about the contact. While a contact is being called, the software displays that contact's history and background details, in order to provide the salesperson with context for the ensuing conversation. Information may be garnered from the sales organization's CRM records, from the contact's social media profiles, or from third-party sales intelligence databases like D&B or Data.com.

Further Resources

Read the full category description here for more information about predictive vs. power dialers and other specific features of sales dialers. Note that there is some overlap between auto dialer software for sales and call center software. Typically, sales dialers focus on outbound calling and contact/lead management, whereas call center software, though it may include dialer functionality, has a bigger focus on inbound call routing and may have features around support tickets or customer satisfaction surveys.

Quote-to-Cash

Quote-to-Cash solutions span the range of sales activities from generating a quote to delivering the goods or service and receiving payment. Depending on the use case, a quote-to-cash solution can encompass CPQ, Sales Proposal Automation, eSignature, Contract Management, eCommerce Platforms, Order Management, Procurement, and other types of software. Generally, they help businesses connect buyer data throughout the deal cycle, automate business rules, and digitize deal negotiation. In this report, we use the term "quote-to-cash" to refer to CPQ, Sales Proposal Automation, and Contract Management, a set of interrelated technologies that are typically used by Account Executives to negotiate and close deals, and managed by Sales Ops administrators. Apttus, Quosal, Oracle (CPQ Cloud, formerly BigMachines), and CallidusCloud are examples of vendors that offer products spanning multiple stages of the quote-to-cash process. See the full category descriptions for eCommerce Platforms and Procurement Software for more information about other quote-to-cash subcategories not covered in this report.

Sales Proposal Automation Software

Proposal Automation software helps salespeople quickly create accurate, personalized proposal documents, and then deliver a produced version of the proposal to clients, whether in hard copy, in an electronic file, or through a link to a custom URL (online proposals). Some proposal automation software also automatically scans proposal documents to check for legal & brand compliance. Sales proposal automation software reduces the need to write proposals from scratch or copy and paste standard proposal language and key account details into a new document. It also handles proposal formatting, via templates or branding rule logic, so that professional documents can be generated without spending time manually fidgeting with fonts, spacing, layout, etc. In addition, sales proposal automation software may include collaboration features that support the revision and upkeep of content, such as expiration dates or another way to flag content that needs to be updated or reviewed, or that let users create jobs and approval processes to send content through the right channels for revision.

Key Benefits

- Streamlines workflow so proposals can be created faster.
- Proposals are better quality—more consistent brand-wise, and more personalized in terms of contact details and CPQ or RFP specifications.
- Improved sales effectiveness through client-focused (customized) proposals and speedy proposal turnaround, both of which may help improve win rate.
- Opportunities for "self" upsell with interactive proposals can lead to higher revenue/bigger deal size without additional effort required from Sales.

Common Integrations

Sales proposal automation software typically integrates with CPQ software and a company's CRM system. It may also integrate with an enterprise content management system, eSignature and/or payment software, product catalogs, and other Sales and Finance applications. Integrations with CPQ software, product catalogs, and CMS systems feed personalized and contextual content into proposals, whereas integrations with CRM systems help track account engagement and sales performance, and integration with eSignature and payment software helps to streamline deals and generate revenue.

Further Resources

For more information about sales proposal automation software features and use cases, read our full category description here. We've also gathered user reviews and ratings of some of the leading proposal automation products, including Qvidian Proposal Automation, XaitPorter, PMAPS, Privia, Quosal, Sofon Proposal Organizer, and TinderBox.

Configure Price Quote (CPQ) Software

CPQ software focuses on generating quotes and managing product configuration requests. CPQ software can be used by salespeople to determine packages and pricing during negotiations with customers, or it can power a self-service customer portal (often for eCommerce operations). Depending on the level of involvement by the salesperson, a CPQ application can be thought of as an automated or guided sales quote generator. CPQ software is especially helpful for sales teams that sell customizable products and services and/or have a complex method to determine pricing. At the core of CPQ software is a rules engine that coordinates resource supply, customer information, and pricing structures. It uses information about the cost and availability of products and services, along with information about options for upgrading, combining, and customizing products and services, to determine how much a specific customer request will cost.

Key Benefits

» Knowledge retention & productivity—helps institutionalize sales knowledge, which can be beneficial for onboarding and training, especially in situations where pricing and configuration are complex.

» Sales alignment—sales teams are aligned around the same configuration and pricing rules, so quotes are consistent and accurate and revenue is predictable.

» Efficient sales cycles—pricing rules are semi-automated, so quotes can be produced very quickly.

» Better customer experience—availability and pricing information is based on a customer's specific circumstances, and all salespeople are on the same page.

Further Resources

For more information about CPQ software, read the full category description and compare leading products on our dynamic TrustMap here. Or, explore user feedback about individual products, including BigMachines (now part of the Oracle CPQ Cloud), QuoteWerks, Apttus, SteelBrick, Quosal, and others.

Contract Management Software

Contract management software systems are designed to help companies create new contracts and keep track of existing (open) contracts. Most contract management systems focus on creating contracts from templates and/or storing signed contracts. More complex contract lifecycle management (CLM) software is designed to help enterprises automate every stage of the contract process, from the approval workflow, to checking contracts against compliance regulations and monitoring important contract milestones.

Common Integrations

Sell-side CLM software might integrate to revenue management, sales force automation, order management, and/or CPQ applications, whereas buy-side CLM software will integrate to eInvoicing, eSourcing, eProcurement, project management, compliance management, and/or legal matter management applications. Many vendors, like Apttus, CLM Matrix, Oracle, CMA Contiki, IBM Emptoris, SciQuest, Selectica, SAP, and Revitas offer integrations on both sides. For the majority of sales use cases, contract management software will need to integrate with other Sales software including CRM, CPQ, sales proposal automation, and eSignature software, as well as with ERP software (especially for enterprise CLM). Alternatively, contract management features, particularly in a "quote-to-cash" solution, may include eSignature capabiltiites.

Further Resources

More details around contract management features are available here, and you can find and filter user reviews of leading products like IBM Emptoris, Basware Contract Lifecycle Management, and others here.

Sales Performance Management (SPM)

Sales performance management is the practice of applying corporate performance management and community management tactics to sales teams, and determining how to best encourage the kinds of behavior that drive sales. SPM is concerned with sales knowledge (best practices), sales rep motivation (incentives, commissions, and gamification), and sales accountability (projected revenue, corporate goals, etc.). The goal of SPM is to educate and motivate salespeople to set goals and satisfy customers. Sales performance management software provides a mechanism for monitoring and guiding sales reps in ways that improve their ability to sell, by linking performance and revenue analytics. SPM tools allow sales managers to monitor, understand, and make changes to sales processes that affect the efficiency and effectiveness of sales reps, based on sales KPIs. They also provide sales reps with insights into their own performance and the performance of others.

Products in this umbrella category may address multiple components of SPM, or may focus on managing sales performance from a particular angle. Many businesses use multiple tools (different types of software + spreadsheets) to manage sales performance. In this report we focus on ICM, gamification, pipeline, and forecasting tools, because those are the most well established SPM software components. They can be thought of as subcategories, since some vendors bundle these features together and brand them as sales performance management solutions. But, note that point solutions also exist—and not all vendors in these areas consider their products to be "performance management" tools.

Components

- Sales training & coaching, which includes things like sales playbooks, skill development, onboarding/new hire workflows, etc. In SPM software, these capabilities are designed around best practices for optimal performance, and may be triggered by or tailored to a particular rep's performance. Sales training point solutions are usually HR or corporate learning management products, where "Sales" is a specific use case.
- Incentive Compensation Management (ICM)
- Sales gamification
- Territory and quota management, which is often bundled with and related to ICM.
- Sales planning and monitoring, which includes goal planning and goal alignment tools, as well as tools that help managers explore what-if scenarios and plan changes to optimize sales performance. This can also include mechanisms for managers and coaches to provide informal feedback to individual reps, or conduct performance reviews and job evaluations.
- Pipeline management
- Sales forecasting and performance analytics

Further Resources

We discuss the different goals and pieces of sales performance management in more detail here. You may also be interested in a few other vendors who are not included in this report, such as Optymyze and Synygy—they offer robust SPM software and services that don't fall neatly into the categories covered by the infographic.

Sales Incentive Compensation Management (ICM) Software

Incentive compensation management (ICM) involves designing, implementing, and optimizing a strategic plan around sales commissions and incentives. The goal of ICM is to improve sales performance by keeping sales people motivated, while keeping incentive schemes within a margin—theoretically, this allows the organization to maximize revenue. Sales ICM software, which is often branded as "sales performance management" software, helps organize and automate this type of initiative. Although sales incentive compensation management tools may be alternately be called sales commission software or commission tracking software, more advanced ICM products go beyond tracking commissions with the ability to set-up more nuanced compensation plans and incentive formulas (sometimes including gamification and contest features or non-monetary rewards). Many also include functionality for forecasting projected earnings/payouts and modeling hypothetical changes to the compensation plan.

Key Benefits

ICM platforms are particularly useful for organizations with complex, hierarchal sales crediting rules, as well as for organizations that want to fine-tune their existing sales incentive programs or develop new, agile incentive programs. Two major benefits of sales compensation management software are that it enables visibility into the relationship between performance and costs/earnings, and that it promotes transparent accounting related to Sales.

Further Resources

We've compiled a list of key factors and features to consider when evaluating Sales ICM software here. You can also use our site to compare user reviews and ratings of leading products like Xactly Incent, IBM Cognos Incentive Compensation Management, and Callidus Commisions.

Sales Gamification Software

Sales gamification software, also called sales competition or sales contest software, allows sales managers to monitor and influence sales performance through competitions, games, and competitive rankings displays. The aim is to motivate salespeople to sell more within a given time frame by spending more time on productive activities. Often the competition centers on a particular product or selling to a particular type of customer, depending on the organization's goals and KPIs. Sales gamification software is also used to motivate the adoption of new sales technology, particularly CRM systems. Although metrics may not be displayed in the usual spreadsheet or dashboard views, reporting is a major function and benefit of sales gamification software. Sales gamification platforms offer a centralized sales performance reporting interface, typically through TV streaming and mobile apps, that is engaging, interactive, and allows reps and managers to see individual vs. team performance. Depending on what performance indicators are tracked, products in this category may be branded as sales activity tracking or sales activity management software.

Common Integrations

Regardless of whether they are used to drive CRM adoption, all products in this category integrate with the company's system of record. Beyond CRM, sales competition software is sometimes used in conjunction with sales incentive compensation management software and/or a broader sales performance management program. ICM and gamification features may both be included (and interrelated) in an SPM suite. For example, sales contest results may power the incentive compensation management logic, so that leading sales people (game winners) receive special compensation. Sales gamification software may also be integrated to forecasting and other sales analytics solutions as well. If it is used in conjunction with these other systems, Sales Ops will likely need to be involved with implementation; however, the primary users who set up contests and access activity reports will usually be sales managers.

Further Resources

More details around specific sales gamification features and use cases are available here. If you're interested in a more nuanced vendor perspective, with more information about the kinds of organizations that use this type of software, read our full interview with Hoopla here.

Sales Forecasting Software

Sales forecasting software is often the primary mechanism for sales reporting. Robust products allow drill-down forecasts and reporting by inventory requirements (demand), number of salespeople and territories, total sales, sales success by account, as well as other dimensions. This is helpful for enterprises that may want to create multiple forecasts for the multiple roles/needs of users across different departments. Software intended to be the core sales reporting mechanism should allow users to break out the numbers or view them comprehensively (for example, so that senior management can understand the state of sales/revenue). Reporting in sales forecasting software is similar to reporting in other sales performance management applications like sales incentive compensation management, sales gamification, and sales pipeline management. Sales forecasting may be delivered as a reporting capability of an SPM suite, or via a robust CRM solution.

Key Use Cases

Sales revenue forecasts have two primary use cases:

1. Projected sales are a proxy for demand, which informs product inventory & resource planning. This is an ERP-focused use case, with the goal of improving production scheduling, inventory management, workforce logistics, and financial planning.

2. Sales forecasts are used to monitor expectations vs. actual sales performance for the benefit of individual reps, sales managers, and executive leadership. This is relevant to corporate planning as well as sales performance management (goal-setting, territory and quota adjustments, compensation plans, etc.).

When sales forecasting software is designed around (or marketed for) demand planning, it may also be called budgeting and forecasting software, or sales demand forecasting tools. Sales forecasting software designed around (or marketed for) sales performance management may also be called sales planning software, sales tracking software, or revenue forecasting tools.

Further Resources

For a robust discussion of sales forecasting methods and product features, read the full category description here. If you are interested in sales forecasting software (and other sales performance analytics) geared towards SMBs and end-users, check out our full interview with InsightSquared. Note that while InsightSquared has a strong foundation in the SMB market, according to the vendor a significant percentage of the company's revenue now comes from mid-market companies with more than 200 employees.

Sales Pipeline Software

Sales pipeline software helps sales reps and/or sales managers envision, track, and manage individual sales opportunities as well as the distribution of all opportunities. Alternatively, these solutions may be called funnel, prospect, or opportunity managers. They commonly include pipeline visualization features, a drag and drop interface, deal probability calculation, opportunity prioritization logic and "next steps" recommendations, calendaring, task reminders, and a mobile app. Simple pipeline tools help reps understand and plan out the deals in their own pipeline. High-level sales pipeline management solutions that organize, distribute, or prioritize deals across a team may be administered by a Sales Ops user, although the individual reps will benefit as well. Though several point solutions like Tracks, Stitch (acquired by SugarCRM), Salesdiver, and ASPEC exist, sales pipeline management is more often a capability of CRM, SPM, Sales Forecasting, or Predictive Sales Analytics tools. Some project management tools can also be used to manage sales pipelines.

Key Benefits

- Simplified workflow—Timeline view and drag and drop interfaces are simpler and more intuitive than spreadsheets or tables.
- Deal prioritization—The visual layout makes it easier for salespeople to envision their set of deals in relation to one another, and prioritize their time and attention accordingly.
- Defined sales process—Building a visual sales pipeline with specific stages or states requires organizations (or individuals) to define and streamline the sales process. This promotes sales pipeline management best practices like consistent opportunity scoring.
- Accurate sales forecasts—An organized sales pipeline helps keep sales forecasting consistent, based on consistent opportunity scoring and calculation of deal confidence levels throughout the pipeline. This creates strong historical data about deal success, ensuring accurate models and sales projections.

Further Resources

Explore the features and capabilities of sales pipeline tools here. You can also check out our interviews with Infer (Prospect Management), The TAS Group (Dealmaker) and Velocify—these vendors offer pipeline tools with built-in best practices and intelligent pipeline prioritization.

Customer Relationship Management (CRM) Software

CRM software can help businesses improve customer relationships by synchronizing customer communications among various business units and touch points, including sales, marketing and customer service. Companies use CRM tools to track, automate, analyze and optimize customer interactions throughout the customer lifecycle. At the core of each of these tools is a database that contains contact information and interaction history for each customer. CRM is already a relatively well-established category, and Salesforce.com is currently considered the market leader among CRMs for Sales organizations. This landscape report is intended for buyers at sales organizations who are already using CRM software. If you do not yet have a CRM in place, our free Buyer's Guide to CRM Software, based on over 490 end-user reviews, contains user insights about leading products and more information on how to evaluate CRM systems.

Sales Acceleration

Sales Acceleration tools and technology speed up sales by automating administrative tasks and streamlining sales processes. They are designed with the goal of increasing sales velocity. This is similar to, but slightly different from, the goal of Sales Enablement software, which focuses more on sales behavior and equipping salespeople with quality materials, quality opportunities, and best-practices. There is certainly crossover between Sales Enablement and Sales Acceleration; many products bundle features of both, and some vendors use these terms interchangeably. In general, Sales Acceleration is a strategic initiative to have more sales conversations, shorten the sales cycle, and/or close more deals. We think it is important to define this term for buyers because it is commonly used by vendors, consultants, bloggers, analysts, and even reviewers; at the same time, we do not use it as specific category label because there is controversy over what "sales acceleration" really means. There is an ongoing debate about whether any piece of software can (or should) "accelerate" sales, and if so, what kinds of software would and would not fit in this bucket.

Sales Enablement

Sales Enablement is a strategy for equipping and motivating sales teams to sell better. It focuses on high-quality, targeted sales efforts, which are supported by sales content and sales intelligence pertaining to the opportunity. It can also involve sales performance management, including incentive compensation plans, territory and quota assignments, pipeline optimization, and sales training and coaching. It involves some elements of automation, but it is more about best practices and optimizing the sales operation and sales communications from a qualitative and organizational standpoint. This is a different tactic than sales acceleration (which focuses more on productivity and streamlining administrative tasks), although they are complementary. Note, however, that many vendors use both of these terms, or use the terms interchangeably. In sales organizations, the Sales Enablement Coordinator or Director of Sales Enablement may be responsible for overseeing sales team hiring and performance, as well as equipping salespeople with tools and best practices. To avoid confusion, we do not use the term "sales enablement" as a technical categorization in this report; however, we expect that buyers will encounter this label during their evaluations, often in marketing materials that explain the vendor's value proposition.

Discussion of Market Trends

1. The Current State of the Market

Over the past few years, analysts, bloggers, and experts have characterized the Sales technology space as "emerging," meaning that it is in the process of materializing (but hasn't quite yet solidified) into a high profile, high demand software market. Some predict 2016 will be a breakthrough year for Sales tech, perhaps the year B2B companies start testing new products and really investing in Sales solutions the way they have in Marketing. So far, we've seen a lot of fragmentation, new entrants, feature additions, overlapping features and categories, and confusing branding around which Sales roles a product serves.

1.1 Sales Specialization

Lately, Sales has undergone major organizational changes, in terms of both people and software. With the goal of growth through increased efficiency and higher velocity, sales teams and sales technology vendors have enacted a basic principle of the Industrial Revolution: division of labor. There are new roles dedicated to specific tasks in the sales process, or specific stages of the sales funnel. At the same time, there are new software products targeted at these roles or functions—Inside Sales software, Prospecting software, Sales Performance Management software, and Sales Enablement software, to name a few.

VENDOR

Typically the sales organization has been chopped up—divided by territory. But over the past half decade, I've observed the emergence of titles, roles, processes, and tools associated with specific functions (covering all territories).

For example, since 2013 'Sales Development Representative' has gone from zero Google searches to a familiar term, while demand for this title has risen to 100,000+ job postings across job sites. Other titles like 'Sales Ops,' 'Business Development Representative,' and 'Senior Account Executive' show similar growth. Organizations, especially high-growth, are now mapping specific stages in the customer buying journey to these specialized sales roles.

Eric Quanstrom
CMO at KiteDesk

VENDOR

> We've studied sales specialization vs. the generalist model. Specialization is 50% more effective at lead conversion for the following reason: for SDRs, a lead is a good thing—following up on a new lead is their number one priority. Whereas for a generalist salesperson, the top priority is closing deals in lower stages of the funnel. So in a generalist model, leads get ignored, or at least follow-up is delayed, reducing the likelihood that the lead will convert. Based on this insight, many sales teams are reorganizing to be more effective.

Dave Boyce
SVP of Strategy at InsideSales.com

EXPERT

> Specialization is a huge driver of sales technology. In an umbrella sales function, it's hard for vendors and sales leaders to figure out which problem the sales app should solve. This is an issue because the most successful sales apps are put in place to solve specific roadblocks. An example of specialization is the SDR function. By isolating the SDR function, sales development leaders can wrap their heads around the activities reps need to do on a daily basis (e.g. write highly personalized emails and make phone calls at scale)—and then figure out which areas are slowing them down. When reps' pain points are isolated like that, sales tech vendors can better develop solutions and ultimately sales leaders can make smarter investments in the technology.

Craig Rosenberg
Co-founder and Chief Analyst at TOPO

VENDOR

> The new sales tech stack is focused on pre-opportunity stage and post-opportunity stage sales activities. Pre-opportunity solutions are used for the sales development function. These emerging technologies address the top of the funnel with list building tools, cadence management tools, and data intelligence products. They're designed to help modern sales organizations get from prospect to qualified opportunity; depending on the organization it can be used by inbound/outbound sales development, lead generation, demand generation, and then more broadly inside sales teams.

Kyle Porter
CEO of SalesLoft

1.2 Fragmentation in the Emerging Landscape

Investment in Sales has been growing, and the sales tech market has grown with it. Experts and vendors predict that 2016 will be a formative year for sales organizations and the emerging sales tech landscape.

VENDOR

> **18 months ago people weren't talking about sales stacks. The shift to inside sales technology has lagged digital marketing by several years. But right now there's a lot of energy building around sales technology.**

Fred Shilmover
Founder and CEO of InsightSquared

Interest in sales tech is becoming more widespread. In a survey of B2B sales organizations, SmartSellingTools.com found that 85% of respondents had done a trial or pilot of a Sales tool in the past year, and two-thirds of respondents had purchased at least one new Sales tool ("2015 B-to-B Sales Tools: Consideration, Acquisition & Performance"). Some vendors attribute this growing interest to success among early adopters, which they believe will drive more widespread investment in 2016.

VENDOR

> **Sales will always be about developing personal relationships. But, as many early adopters of sales technologies have realized, the more tasks and activities you can automate and make easier for sales reps, the more time they can spend developing said relationships. We expect this new mindset to really take hold in B2B organizations across industries over the next 12 months.**

Daniel Roderiguez
VP of Marketing at Seismic Software

Still, according to experts fragmentation is making it difficult for buyers (and vendors) to navigate sales tech successfully. The landscape is fragmented in terms of the overall number of products as well as the growing number of subcategories. Rather than shopping within an individual category—trying to solve a particular pain point with X type of tool—many Sales leaders are evaluating and comparing products across the sales technology space. They're shopping for a solution that will be adopted and that will show immediate ROI, without necessarily knowing the exact features they're looking for.

EXPERT

"The difficulty that sellers and buyers have right now is that there are so many tools. It's a constant struggle in terms of prioritizing what is really needed first—or most. Companies typically want to choose whatever is going to give them the shortest return on their investment with the least amount of effort and cost.

Nancy Nardin
Smart Selling Tools

EXPERT

"In terms of software markets, Marketing Automation had a lot of steam—of course, MA is more about inbound. Most organizations are beginning to realize that inbound is a good starting point, but they can't leave success to just inbound. I now see outbound becoming more prevalent, and I've noticed a lot more Sales tools on the market. This is the beginning of a shift. In many organizations, historically the CMO has had a bigger budget than even the CIO, and the Sales budget has been left behind. That's changing as outbound becomes a priority, and Sales tools are developed to help push prospects all the way through the pipeline.

Craig Elias
Author of SHiFT! and founder of SHiFT Selling, Inc.

EXPERT

"If I was a buyer, I would be overwhelmed. There are so many different types of technology, and at first glance they all seem to be really similar—all of the vendors have similar value propositions. It is very difficult to discern which kind of technology will really fit your strategy.

Barbara Giamanco
Founder and CEO of Social Centered Selling

1.3 Challenges with Product Evaluation & Comparison

Unlike more established Martech categories, comparing Sales technology is not yet an apples-to-apples contest.

EXPERT

"Because SaaS makes it easy for vendors to quickly build a product and go to market, there has been an explosion of Sales tech offerings. Right now there are too many point solutions, too much overlap between feature sets, and too many different data sources. This has created a very confused, overwhelmed buyer. But I think we will continue to see an explosion of Sales technology—we're still fairly early on in that trainwreck.

Jill Rowley
Social Selling Expert & Tech Startup Advisor

Without a comparison of like features or past experience with similar software, it's hard for buyers to figure out how to evaluate products. It's also hard for vendors to develop a clear and compelling value proposition.

EXPERT

There's a lot of competition and a tremendous amount of confusion, both for buyers and vendors. Some tools are very hot for a moment and then they fade out; many get gobbled up by the bigger vendors, like Salesforce. A lot of buyers find it complicated to figure out what they need. Whereas I am a big advocate of sales technology, it can be hard to assess which pieces to buy and how they will fit together to make the system usable. At the same time, a lot of vendors are struggling with positioning: are they selling to more tactical sales teams, or more strategic sales teams, for example? They need to assess the marketplace and figure out how to differentiate themselves which will further ensure buyers get the best solution for their sales teams. I think we will continue to see changes as the market matures.

Janice Mars
SalesLatitude

This phenomenon is typical of emerging software spaces. Sales tech vendors will need to work more to educate buyers and define customer success. Buyers may be more interested in customer references and account managers who use hard metrics of success than in new, innovative features.

EXPERT

The two biggest considerations for Sales technology buyers are adoption and ROI. Vendors need to get better at explaining those things. Right now they focus on the features and benefits of their product, but in our research we found that the pain points in the decision-making process are: 1) not having confidence that the tool will be adopted, and 2) not being sure how to measure the tool's impact on performance.

Nancy Nardin
Smart Selling Tools

VENDOR

"Buyers of sales technologies are looking to make more money and grow faster. The market talks a lot about productivity, and that is one of the benefits that sales technology can enable, but stitching multiple solutions and technology stacks together doesn't deliver on the promise of growth. For most of our customers the decision rests on dollar values and time—they don't have years to build and integrate their tech stacks, they need to grow their sales capacity and increase profitability immediately and they need a connected sales and marketing platform to achieve their goals. The easiest way to grow capacity would be to hire 100 more salespeople, but that's not profitable. So we think that the number one way to improve sales capacity is to help them execute their sales process better—boost conversion rates with good content, get quotes out faster, get deals signed more quickly, etc.

Giles House
CMO at CallidusCloud

2. Buyer Considerations: ROI & Adoption of New Sales Technology

2.1 The CRM Precedent

In Sales, adoption is tricky—and crucial. As we've seen with CRM systems, new Sales technology is often perceived as *requiring* effort from sales reps while *providing* benefits to sales leaders. Reps are slow/reluctant to adopt tools if they don't see any immediate, personal benefit; in turn, leaders are worried about forfeiting their ROI if the tool does not gain uniform adoption.

EXPERT

"Some of these solutions have been implemented using more stick than carrot. The industry needs to move towards tools that make sense to the sales rep, the sales manager, and the executive.

Janice Mars
SalesLatitude

VENDOR

"In terms of market maturity, I think we're in the first inning—actually, sales tech might still be warming up. First came the art of selling, with no technology whatsoever. Then came CRM and sales force automation, which helped managers keep track of accounts and sales stages and notes. But those solutions were really for managers (and they only did so much). For sales reps they were an annoyance. So now the tech industry is addressing sales activities and performance. We're helping salespeople do their job better and helping sales teams be more effective.

Dave Boyce
SVP of Strategy at InsideSales.com

Most buyers are Sales leaders, who don't tend to "bite" on benefits like productivity and convenience at the individual rep level. They're focused on the measurable ROI of Sales tools, which can be challenging to quantify.

VENDOR

We typically sell to Sales development leaders, Sales ops and Marketing. To date, there hasn't been consensus for how to measure the tangible ROI from sales intelligence since it impacts many areas of the lead-to-revenue lifecycle. It's similar to CRM in that it's becoming a matter of table stakes. How do you place an economic value on insight? A few of the measures include: improved lead-to-opportunity conversion, lower cost per lead, and time saved from better sales productivity.

Joe Andrews
VP of Marketing at InsideView

Experts recommend that buyers set their own clear expectations for ROI before engaging with vendors, which requires a bit of due diligence. Ideally, buyers need to first reflect on their own sales process and learn about the sales technology landscape in order to determine if and why a particular type of tool is needed. This will help Sales leaders and sales development leaders better measure its impact on rep productivity as well as the bottom line.

EXPERT

Buyers of Sales Technology need to identify a 'negative ROI' before they implement new tools. For example, a sales leader knows he/she needs a CPQ tool if they find that their reps are wasting 20% of their time on paperwork. The cost of not having a CPQ is taking a clear toll on his sales force; there's a demonstrated need for the technology. If buyers go in knowing there is a quantifiable reason to implement the software, then ROI is not elusive because they know what sort of lift they're trying to get—they shouldn't be asking the vendor to define the terms of ROI for them.

Craig Rosenberg
Co-founder and Chief Analyst at TOPO

2.2 Understanding Vendor Positioning

Ironically, while productivity tools tend to be more easily deployed and quickly adopted, they can be more difficult to sell, because they're harder to justify to sales leaders, who are thinking about hard ROI. To some extent, this chicken vs. egg dynamic will level out as the market matures and investment in Sales technology beyond CRM becomes standard.

For now though, pressure to market to Sales leaders has caused vendors to position themselves as "sales performance management," "sales enablement," or "sales acceleration" solutions—all strategic leadership functions, despite the fact that with many of these products, reps will be the primary users, and sometimes the most immediate beneficiaries. However, experts (and some vendors) encourage buyers to think about ROI in terms of a long-term cost/benefit ratio. They suggest productivity tools for sales reps have the potential to significantly impact a company's bottom line.

EXPERT

> **I've seen sales solution vendors go out of business because they focused their value proposition on how it helps salespeople. That's a shame. But sales managers look at tools very much from the 'what's in it for me' standpoint. That attitude began with CRM and hasn't changed. It's time for companies to look beyond what managers need and look for solutions that answer the question 'what's in it for me as a salesperson?' Reducing the non-selling tasks from the average of 65% of a rep's time to 50% will increase revenue by 42.85%.**

Nancy Nardin
Smart Selling Tools

Some Sales vendors, like Yesware and ToutApp, have a different go-to-market strategy, designed to avoid the lack-of-adoption problem and clearly demonstrate the impact of the product in context of a particular use case. Rather than selling only at the leadership level, they offer inexpensive licenses to individual users. Then, once enough salespeople have taken personal initiative, the vendor approaches higher-ups with specific measures of success that have already been achieved.

VENDOR

> **What we don't want to do is repeat the CRM mistake—CRM implementation takes 6 months to a year, and failure of implementation and adoption is very high. We've purposely designed our platform so that reps get value immediately, and we can we can power up quickly to drive value for management and the rest of the organization. There's a natural progression of adoption and deployment. An individual sales person will sign up using the productivity tool. Once enough salespeople at the company sign up, we work with them to institutionalize ToutApp across their sales team. Then we educate them and partner with them to start using our automation tools, work with Marketing to bring on an enablement piece, and work with managers to give them data insights.**

Tawheed Kader
Founder of ToutApp

VENDOR

We're seeing a larger trend around the consumerization of business technology, and it's particularly prevalent in the Sales software industry. Software is designed to be very user friendly, and to grow from the bottom up within an organization (as opposed to top down adoption).

Andrew Archer
VP of Marketing at Yesware

There are vendors that sell at the leadership level, like Outreach, that also acknowledge the importance of adoption and the need to prepare a two-tiered value proposition. Outreach works with local team leaders to do a pilot program, drive adoption, and develop contextual proof of ROI. This is a slightly different method of addressing the same problems: customer success has not been well defined in Sales tech categories yet, and historically, buy-in from management has not guaranteed adoption by reps.

VENDOR

Our business model is to go both down the chain and up the chain. We have to sell the ultimate writer of the check with a different value proposition than the users. The sponsor writing the check could be VP of Sales, VP of Marketing, Director of Sales Operations…For them, we need to be able to gain adoption and show ROI. But the stamp of approval really comes first from the individual team leads: SDR managers, AE leads, regional directors, or the VPs of a particular area or territory. Because they're closer to the actual rep workflow, they get to see the direct impact of Outreach and verify adoption. We work hands on with the reps and managers, and then we help them provide the higher-ups with an ROI argument. We measure sales performance pre-Outreach, and then we track the improvements.

Manuel Medina
CEO of Outreach

2.3 Success vs. Obstacles to ROI

Achieving adoption and ROI success may be an order-of-operations issue. If sales management has well-defined goals, and software investments are clearly aligned to those goals, sales reps may be more likely to adopt the new technology. This internal understanding of "success" at the leadership, management, and rep level helps drive adoption.

EXPERT

The biggest roadblock to ROI is lack of adoption. There's a big difference here between MarTech and Sales Tech. In Marketing, once a buyer invests in a new tool, their team implements it. In Sales, all 150 reps view themselves as independent operators, to some extent, and since they are focused on making quota—they're not going to band together to implement new software. The best organizations have figured out how to do the slow roll, creating internal success stories with sales technology so that other salespeople want to start using the tool.

Craig Rosenberg
Co-founder and Chief Analyst at TOPO

Many sales tech vendors have seen customers struggle to see positive ROI if they are juggling too many sales tools without a clear vision of why they're using each piece.

VENDOR

Right now, I'm seeing a lot of companies rip sales software out. Sales leaders spent the last 3 years buying every shiny object they saw—stuff that looked cool in isolation, but is not being adopted. In order for the technology to be useful, managers need to first establish primary operating metrics for evaluating and managing their teams. Once those fundamentals are in place, then they can layer solutions on to accelerate activities like dialing or email. If the tools help salespeople meet and exceed their core sales metrics, they will get adopted.

Bob Marsh
CEO at LevelEleven

Experts, vendors, and users mentioned that two of the biggest obstacles to getting ROI from sales tools are lack of executive buy-in and lack of adoption by end-users. While some sales tech vendors do better at one end than the other, many sales leaders and system administrators find both objectives challenging. In order to achieve and prove positive ROI, it's important to have support for sales reps using the tools, as well as reports on usage and impact for management. Here's how one reviewer described her experience managing adoption of a sales tool and justifying the investment to leadership:

USER

"We did not have a lot of buy-in when the tool rolled out, nor do I think there was much training offered. It has only been since early 2014 that we have started to get adoption of the tool. For us, seeing the numbers rise on usage has been positive enough!

As a system administrator, I wish I had access to real time reports regarding usage. Often times, senior leadership wants to know how their teams are using the information and who is using the software to its fullest."

Missy Parrish
Sales Enablement Coordinator at Interactive Intelligence

Adoption and ROI should continue to be major concerns for buyers. But evidence suggests that when buyers spend more time and attention evaluating sales tools, the tools are more likely to be adopted and meet the needs of their organization. According to a study done by Smart Selling Tools, buyers who routinely spend "21 percent or more of their time considering the need for new, or the effectiveness of existing sales tools are almost three times more likely to report that gaining user adoption is easy. This is clearly a case where the upfront investment of time in the consideration process yields benefits on a backend process phase that is critical to achieving success with a sales tool" ("2015 B-to-B Sales Tools: Consideration, Acquisition & Performance").

The lesson: Take the time to define your sales process and identify key metrics for success before investing in sales technology. Be aware that most leading vendors will help you do this (via a customer success team), but their concept of success will be structured around their product offerings.

3. Building a Sales Stack

VENDOR

> **The Sales stack is coalescing in a very different way than the marketing stack. In Martech, first there was CRM, and then Marketing Automation (which uses contact data from CRM). Marketing Automation became a huge mass, the center of gravity around which many satellite point solutions started to orbit. In Sales, you have the same CRM prerequisite, but there is not yet that same center of gravity that Marketing Automation vendors provided to the marketing stack. So in Sales tech we're seeing more smaller point solutions clustering—very different from the Martech 'precedent'.**

Joe Chernov
VP of Marketing at InsightSquared

Generally, most experts, vendors, and users agree there is no such thing as a one-size-fits-all approach to building a sales stack. This may be partially due to the fragmented, highly-saturated marketplace, in which no clear foundation for the Sales stack has emerged. They recommend first evaluating your sales process to find pain points and bottlenecks, then identifying specific roles and tasks where Sales tools could improve sales rep productivity, the quality of sales conversations, or the accuracy and availability of data.

EXPERT

> **In terms of investing in sales tools, Sales organizations usually get it wrong when they start with the technology first. Instead, they need to start with evaluating their strategy, and then map the technology to their desired sales process.**

Barbara Giamanco
Founder and CEO of Social Centered Selling

USER

"Every sales operation in every industry is a little different. In general, if I were building a new Sales technology stack I would probably look at the quote-to-cash processes and tools first, and then focus on meaningful conversion metrics between Marketing and Sales."

Christoph Risch
Sr. Director of Sales Operations at Kinnser

3.1 Where to Look First

Although every organization's perfect sales stack may look different and take a while to develop, there are a few technologies that typically make the shortlist. In addition to CRM systems—which underlie most teams as the sales & marketing systems of record—sales intelligence, sales email tracking, and quote-to-cash automation tools are quickly becoming must-have technologies. Currently Sales Intelligence and CPQ are the two most frequently trafficked Sales tech categories on TrustRadius, after CRM.

EXPERT

"In many cases, tech is built (and bought) to enable companies to improve their sales process and internal metrics like velocity, win-rate, etc. My point of view is that everything salespeople do should be buyer-driven. Technology, particularly things like email tracking, can help salespeople understand the digital body language of buyers. For example, I know I'm not pestering a prospect if I see that he has opened my email multiple times and is forwarding it to coworkers; he's someone I should follow up with. So I'm using tech tools to be more considerate: to do better research about my buyers, and to engage with them in new, more relevant ways. I'm also interested in sales content and video tools, especially with digitally native generations coming of age in the workforce. Traditionally, video has been more for marketers, but I think we're going to see a lot more use cases for Sales to leverage video.

Jill Rowley
Social Selling Expert & Tech Startup Advisor

Compared to management-oriented solutions that help optimize sales processes and reporting, these products require less strategic planning, are helpful for reps on an individual basis, and are usually priced by the seat. While gamification platforms, predictive sales analytics, and other tools used/set up primarily by sales management and operations can have a huge impact, they involve more challenges with approval and adoption, and typically aren't the first pieces of a sales stack.

EXPERT

Certain point solutions are almost a given now, even for companies who aren't using a CRM. There is really no reason not to be using sales email tracking and eSignature tools, and using a solution that allows you to templatize and automate proposals—that's another no-brainer. Reps also need to be able to present information to prospects in a way that will help them rise above the noise; tools like Folloze and ClearSlide allow salespeople to package up content nicely, and they also allow for collaboration. While content tools like these should be another no-brainer, I do find they still take a bit more education. But I think those four types of tools should be a part of everyone's sales stack from the early stages, especially for inside sellers.

Nancy Nardin
Smart Selling Tools

Sales content tools, which range in complexity from slide-sharing/branding kits to content recommendation engines, are also gaining traction. They focus on productivity—efficiently creating and delivering content—and content engagement tracking. This piece of the stack often connects Marketing, who owns branding, with Sales, who needs to pass knowledge on to prospects and customers. Sales teams may also use sales content tools to share assets internally. What users are saying about sales content tools in reviews on TrustRadius:

USER

"If you are a large organization and looking to save on productivity, time, and improve branding across marketing and sales pitches, this software is absolutely amazing."

Justin Croxton
Director of Marketing at Que Commerce

USER

"This has become a vital tool for our sales process and as we grow as an organization, the ability to deliver content efficiently and effectively will become a key performance indicator in measuring our business goals for the coming fiscal year."

Administrator in Sales
at an Education Management company

3.2 Sales Intelligence Ramps Up

Aside from email tracking and automation tools, sales intelligence seems to be the sales tech category with the most momentum and adoption, at least in the B2B arena. According to a survey done by SmartSellingTools.com, SI is among the top three most widely used sales technologies, and is among the top two most interesting technologies to buyers; it is a sales stack priority for small, medium, and large teams ("2015 B-to-B Sales Tools: Consideration, Acquisition & Performance"). SI tools help with prospecting for new contacts, augmenting contact records with missing information or company and industry details, qualifying and prioritizing leads, and/or tracking email and website interactions on lead records. What users are saying about Sales Intelligence software in reviews on TrustRadius:

USER

"Cold calling is an important aspect of my job, but one of my least favorites. This has made it so much more enjoyable and easier to start conversations. It also helps me get to the right person in the company a lot faster than what I was able to before."

Abagail Scassa
Program Manager at Shannon English Marketing

USER

"It helps us keep tabs on the industry as a whole, and conduct in depth research on particular accounts of interest. It is massively beneficial not only in finding out who to get in touch with, but when, when not to, and how."

Joey Avery
Account Executive at Quantcast

USER

"Positive impact #1: Immediate ROI. My SDR team is brand new and we saw immediate impact by getting and qualifying meetings with the world's largest brands. Positive impact #2: Saves so much time. Everything from ease of use to cutting data mining."

Hyunjin Lee
Head of Account Development at Rakuten Marketing

The goal of SI tools is to make contacts alongside contextual information easily available to sales reps, with the hope of improving the quality of interactions and the efficiency of sales efforts. Some sales intelligence software is designed to fit seamlessly and noiselessly into the user's Salesforce or email client UI, while others create alerts or disruptions to grab a salesperson's attention.

EXPERT

> "CRM underlies the sales operation and the sales stack, as the system of record. But most sales teams are missing the right data within their CRMs. I believe you should have a list of each company's biggest competitors. Sales intelligence technology that performs newscraping and serves up alerts about competitors is incredibly useful. By tracking changes in geography, competitive offerings, and account management—all trigger events—salespeople can get into new opportunities during the window of dissatisfaction.

Craig Elias
Author of SHiFT! and founder of SHiFT Selling, Inc.

For sales teams selling in highly competitive markets or organizations interested in account-based marketing, sales intelligence tools that pull in current events and firmographic data may be the place to start with sales tech investment in 2016.

EXPERT

> "Account-based marketing is going to gain big momentum this year. Don't focus on the people, focus on the account—get a conversation by talking to more than one person at a company. If you also have news alerts, when you send a personal sales email you can mention events related to their competitors, making it much more likely that your message will peak their interest. If you're tracking your own competitors on a per-account basis, you can send emails when events (like their account manager leaving) happen. Currently, most personalization is at the level of "Hi [NAME], I see you're at [COMPANY]..." and often this doesn't stick. Effective personalization requires organizations to gather data that they're not gathering today, in order to make better use of the tools they already have.

Craig Elias
Author of SHiFT! and founder of SHiFT Selling, Inc.

3.3 What Should Be Automated?

Unlike Marketing Automation, which facilitates one-to-many communications, tools for sales reps facilitate one-to-one communication. The nature of "effective personalization" for sales emails is contentious, but most experts and vendors agree that it requires data about the individual or the account, and that too much automation can be a dangerous thing. There's a shift away from triggered emails, batch-and-blast approaches, towards intelligence and templating features that enable salespeople to efficiently send relevant, timely messages on an individual basis. Mail merge is an example of a borderline personalization/automation feature—it does maintain 1:1 threads, and touts the advantages of a bulk action, but the extent of "personalization" is limited to the kinds of vanity placeholder slots described by Craig above. If the trend toward buyer-centricity continues, we expect to see greater depth of personalization features to support more custom sales messages, and perhaps more integration between sales email and sales intelligence tools.

EXPERT

> The most effective sales technology fills in blind spots in our ability to know our buyers. But the message needs to be buyer-centric; it needs to help people buy the way they want to buy. Sales email tools can automate and amplify greatness, and they can automate and amplify suckiness. It's important to remember that technology is useful when it allows us to deliver the right information at the right stage via the right channel, personalized to a specific individual.

Jill Rowley
Social Selling Expert & Tech Startup Advisor

VENDOR

> With sales emails, there's a trend around sincerity. The most effective, most popular sales teams have moved away from automated spam blasts and triggered emails. They're sending more intelligent and more personal email, because they want to make sure the person on the other end of the email realizes it was sent by a person who cares. Useful sales tech can accelerate the process and timeline to get these great humans in front of prospects.

Kyle Porter
CEO of SalesLoft

Sales leaders should invest in technology that will enhance their existing framework, and automate tasks (like inputting and aggregating data) that don't require a discerning, personal eye. Several experts mentioned CharlieApp, a fairly new SI tool that automatically compiles one-page debriefs on new contacts and sends them to salespeople before meetings. Configure, price, quote (CPQ) software is another example of a sales automation tool designed to prevent salespeople from needing to constantly cross-reference pricing rules and re-enter data.

Some vendors with core automation offerings are building out activity tracking and analytics, which can be used to semi-automatically guide sales processes based on the behavior of top performers.

VENDOR

> I think we'll see a bloom of business intelligence related to CPQ and the sales process, with unique performance KPIs. This is part of a general trend towards sales process optimization. Sales organizations need to profile what their most successful sales professionals are doing, so that they can move towards a more data-driven model for training and coaching the rest of their team. With automation and guided selling technology, new salespeople will be able to come onboard and become successful very quickly.

Kent McNall
General Manager of Quosal

There is a fine line between guided selling recommendations, personalization, and automation. In some cases, rules engines and artificial intelligence can simplify or optimize your sales process. However, despite analyst predictions of a Sales job market Armageddon, most of the vendors and experts we talked with believe that the human role (in complex sales cycles, at least) is as important as ever.

3.4 Align Marketing and Sales

Predictive sales analytics software is an example of a sales tool that uses machine learning and big data, to make predictions about high-value target customers and warm deals that are likely to close. It's also tightly linked to account-based marketing strategies, which are based on ideal customer profiles, and which experts identified as a growing Sales/Marketing trend.

VENDOR

B2B marketers and sellers are embracing Account Based Marketing and predictive analytics as a way to get better aligned on their targeting and improve conversion and close rates. The key is having accurate data on target accounts. We ecently released a market study that found 39% of companies list that issue as one of their top challenges. Crack that problem and companies can improve performance at every sales stage. We believe this requires solutions that span the Marketing and Sales stacks.

Joe Andrews
VP of Marketing at InsideView

Although predictive sales analytics tools are still, for the most part, in the early adoption phase, we were interested to hear that several experts and vendors recommended that these tools be a key, early piece of the ideal sales stack.

EXPERT

I love the concept of account-based marketing. The thing I hate about ABM is that it has "Marketing" but not "Sales" in the term. It's really about the alignment of the two teams. I think Sales buyers should be looking for solutions like predictive technology that can help them algorithmically identify their best-fit customers—not the highest paying customers, but the customers who are getting massive value—and find more of them.

Jill Rowley
Social Selling Expert & Tech Startup Advisor

The need to align Marketing and Sales, as well as the difficulty of doing so, is evident in the slippery name for this kind of software. Lattice Engines, a leader in the space, explained that predictive analytics serves the Marketing to Sales pipeline. It may require some organizational change, but according to vendors, the result is that both teams can perform better.

VENDOR

> **The category that seems to be emerging is, unfortunately, called 'predictive marketing,' even though it is really 'predictive marketing and sales.' I think the marketing/sales distinction is going to go away over time. It's kind of an artificial distinction, especially as marketers have become much more revenue focused and less awareness focused. Our applications span the marketing to sales spectrum. Our position is that their needs are more similar than different.**

Shashi Upadhyay
CEO at Lattice Engines

4. The Future of Sales Tech

4.1 To Bundle, Or Not to Bundle?

EXPERT

> **The industry is starting to consolidate, slowly; where solutions are bundled, it is easier for a sales executive to pick and choose.**

Janice Mars
SalesLatitude

Some believe the space is at a critical turning point, where fragmentation has peaked and now solutions have begun to expand and/or consolidate, moving from point solutions toward all-in-one platforms and suites. Frequent comparisons are drawn to the evolution of the Marketing Automation space, which saw fragmentation followed by M&A.

VENDOR

> “This unbundling and re-bundling that's happening in the Sales space right now is still in its early days. But there's more awareness than ever before. We've watched the same thing has happen in Marketing Automation. Originally there were 10 or 20 different tools, but eventually Eloqua, Marketo, and Pardot became leaders because they packaged the right tools together. We think the same thing will happen in Sales.
>
> We're trying to drive this change in the marketplace. We want ToutApp to be the 'sales success platform'.

Tawheed Kader
Founder of ToutApp

However, most of these solutions are still strongest around one role or stage of the funnel. Because the Sales process is so complex and distributed, we have not yet seen a platform (bar Salesforce + App Exchange) that covers all roles and stages of the funnel. Right now it seems that vendors are the main drivers of "bundled" platforms and broader feature offerings; although this is the direction their roadmaps are headed, most Sales organizations aren't quite there yet.

VENDOR

> “There is a lot of fragmentation in terms of solutions, mostly because different vendors have taken different approaches to building out their offerings. On the one end of the spectrum you have point solutions, and on the other end you have broader platforms. But even these more comprehensive solutions have different strengths, because they've taken different paths to get there—for example, a tool that started as email tracking and has been expanding its features, is still at its core email-centric. But the continued evolution of the space has created competing offerings, however in my view only the vendors who are attacking the end-to-end problem and providing real material ROI in the shortest term will win.

Manuel Medina
CEO of Outreach

It can be useful to pay attention to where a vendor started off—where is the product's core competency? Which features are the majority of customers already using?—beneath the messaging about new directions and planned feature additions. If the development of the Social Media Management and Marketing Automation spaces are any indication, the foundation of a tool will most likely continue to be its strongest feature set.

EXPERT

“In a perfect world, sales reps should be using the fewest possible number of apps during their day—3 at the very most. As such, the ability to put everything in one place is the ultimate goal, especially considering difficulties with adoption. But the feature set of the bundled solutions is not yet on par with best of breed. Until it becomes an even playing field, the bundled solutions are going to be sub-optimal. Sales email tools are a great example, because a lot of those vendors are adding phone capabilities, which is great, but they aren’t quite as robust as the dialer solutions yet. That will change as vendors continue to develop and optimize more features, but for now, the key is to find tools with open APIs that can integrate and stick together.**

Craig Rosenberg
Co-founder and Chief Analyst at TOPO

4.2 Importance of Integration in the Changing Landscape

It is important to be cognizant of not only individual product roadmaps, but also potential changes in the competitive landscape, and how these might affect your Sales stack. Over time, increased competition or market consolidation may redraw category lines and partner affiliations. Therefore, integration and continued feature support are two big long-term concerns for sales buyers.

VENDOR

“The sales technology market is maturing, but we have a long way to go. For example, 50% of the prospective customers we talk to still use Excel to prepare quotes—that’s evidence that the market is not yet mature. There is a school of thought that CPQ should be bundled with CRM. But we firmly believe that at this stage, quote-to-cash should be its own product platform, with deep integrations to a variety of CRMs, ERPs, and accounting systems. Users need to be supported with robust features and a seamless flow of information, regardless of changes in other parts of the marketplace.

Kent McNall
General Manager of Quosal

Even as broader offerings become available, it may be a good idea to select a vendor that started in the specific area of Sales tech that’s most important to your use case. This may be especially challenging for Sales, where end-users are farther removed from leadership, who have a limited budget and concerns about adoption, and wish to limit the number of different solutions purchased. Bundled platforms for Sales Acceleration, Sales Enablement, Sales Success, or Sales Performance Management are competing for buyer attention with CRM add-ons, like the Salesforce App Exchange, and to some extent with Sales features offered by MA vendors. Native solutions promise new functionality with an integrated user experience, which is a major consideration for sales buyers. Our takeaway from these conversations is that mature buyers, who have more experience building (or *re*building) a sales tech stack, prioritize how well their investments will fit together over strong features.

USER

"My preference is to use CRM-native functionality in most cases. As a buyer and a sales leader, I want my team to use as few tools as possible, to keep our process as simple as possible."

Christoph Risch
Sr. Director of Sales Operations at Kinnser

USER

"To some degree, I think best of breed is always a good choice. But our CRM investment—Salesforce—has made a huge difference in which point solutions we consider. If a tool integrates natively into Salesforce, not just in terms of data but also in terms of the interface, we're more likely to seriously consider it. The ideal stack has best-of-breed functionality with a single, consistent experience for Sales users."

Jeff Sublett
Sales Operations Manager at Blackbaud

USER

"Previously we were trying to stitch together a lot of different products, which was painful and challenging. I think a key question to ask when evaluating sales technology is: what do we want to integrate and how will it work together? Especially for a small company, that can be difficult—but it's really important."

Chris Dunkin
VP of Sales at Aunt Bertha

Sales tech may or may not consolidate in 2016, but experts say the trend towards integration between sales tools will continue, and having all sales tools linked into your CRM, ERP, and other major systems will become increasingly vital. (In general, we hear the business technology marketplace—buyers, vendors, and experts— calling for an end to siloed data!)

With sales applications in particular, not only the underlying data but also the application UIs should be integrated. The most helpful tools will simply operate within existing workflows, surfacing data and new capabilities within the systems salespeople already use, like email and CRM.

EXPERT

One of the biggest challenges for Sales teams is too many point solutions with too many different data sources. Buyers need to ask: how does the point solution fit into the overall Sales stack? I also look at things from a revenue stack perspective—how does the tool fit into the company's overall rev stack?

Jill Rowley
Social Selling Expert & Tech Startup Advisor

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