

Building a sales enablement tech stack [checklist]

Across sales organizations, tech stacks are becoming more and more complicated. It doesn't matter whether you operate in the customer success realm, the sales enablement department, or marketing.

The truth is that there's a lot of pressure on you as a product marketer when you're completing sales enablement tasks. You have to make sure your tech stack is both economical, meeting the needs of everyone under your care, and making your work life easier.

At PMA, we recognize that pressure. That's why we've put together this step-by-step checklist for building a tech stack. Whether it's your first enablement role, or you have a decade of experience, reminders only help.

Step	Explanation
Step 1:	<p>Before you start evaluating vendors and shopping around for fancy tools that'll make your life easier, there's some steps you have to take. Firstly, audit your current setup thoroughly.</p>
Perform an internal tech audit	<p>This is especially useful if you're a new sales enablement hire in an organization, but it's always relevant.</p> <p>An internal tech audit is more than just looking at a list of tools and thinking: "Yep, these are the ones we've got".</p> <p>Examine every tool in your tech stack deeply. How often is it being used? If it's being used often, is it <i>actually</i> leading to better results? Ask the user base what they think of each tool. Does it help them, or do they use it because they feel obligated to?</p> <p>A true audit here will involve a mix of qualitative and quantitative data which you can then assess in its entirety to get the full picture of your organization's tech stack.</p>

Step 2:

Analyze your organization's needs

Now that you're familiar with the technology you're currently employing, and have analyzed it, you can start to assess what you need to add to the tech stack.

Remember that sometimes, less is more. If your feedback showed that of your 15 tools, only 4 were used regularly then scaling back *has* to be a consideration. In that case, you focus on addressing the areas in which those 4 tools specialize.

It's important that your tech stack incorporates the *actual* needs of your sellers. Otherwise, you'll end up with an inefficient, ineffective, bloated tech stack.

Step 3:

Define what's essential, and what's a bonus

If you've completed steps 1 and 2 correctly, you should have a list of tools that your organization needs. These tools will be really beneficial to your sellers, and you expect them to bring a good return on investment.

That's great, and in an ideal world, you'd head out and acquire those tools. However, most sales enablement professionals don't have the luxury of an unlimited budget, so you have to plan for that.

Of the tools, you want to introduce to the organization, which is most important? Which will have the most impact on revenue generation? Which provides the most support to sellers?

This will differ from company to company, but prioritizing your list like this means that

when it comes time to make tough, budget-related decisions in building your tech stack, you'll be prepared and ready.

Step 4:

Shop around, and evaluate vendors

Sales enablement is not as niche as it once was. There are a tremendous amount of options when it comes to tools and software. Many do similar things or do the same thing differently.

That means that the best onboarding tool for one organization might not be ideal for another, and a learning management system (LMS) that doesn't suit one company, might be great for another.

Do your research, ask for demos, and explore your options. Sometimes, it'll be one small feature difference between tools that'll decide how convenient that tool is for your teams.

Evaluating *all* vendors doesn't just mean you're making the best possible decision for yourself, but you'll be doing right by your sales teams too.

Step 5:

As mentioned in step 4, there's *a lot* of options these days when it comes to sales enablement tools and software these days.

Routinely review your tech stack

You'd be doing your organization a disservice if you didn't keep your finger on the pulse of the latest developments in the industry. Who knows? Maybe the perfect tool for your company is just around the corner.

In addition to ensuring that you aren't wasting budget, tech stack reviews give you the opportunity to grow and evolve the tech stack to meet your organization's needs.

What you need now might be different from what you need 18 months later just because of changing targets, revenue growth, and more.
