

GUIDE

Essential Questions for Sales Enablement RFPs

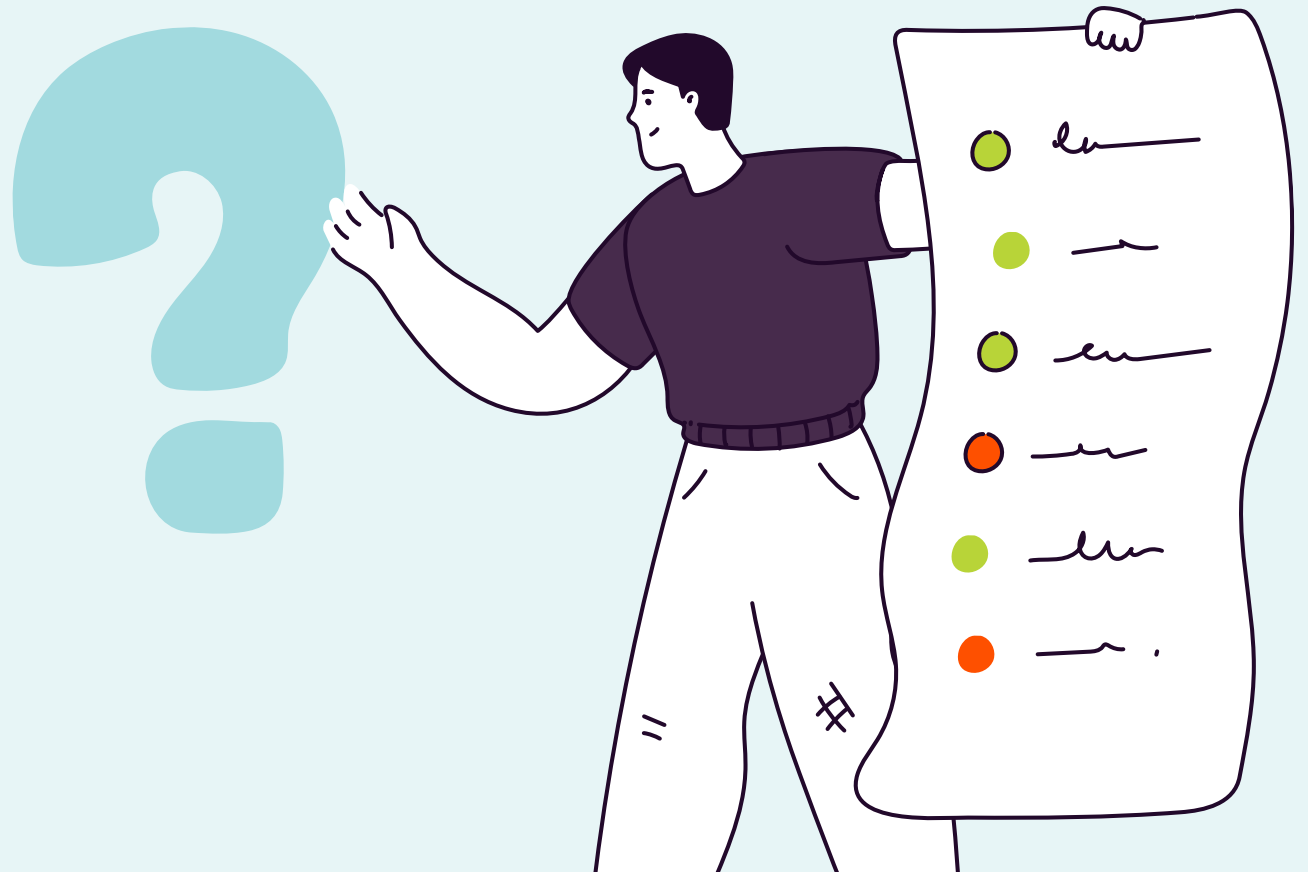


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Introduction

Sales enablement, as both a discipline and a strategic initiative, continues to grow in leaps and bounds.

The growth of sales enablement solutions is similar to Moore's law in that the advancements, depth of knowledge about the field, and the number of practitioners seem to double every year. What was once a new development in the field quickly becomes an accepted standard—and organizations must stay on the forefront of these innovations to avoid falling behind.

There's good reason to stay up-to-date on the latest innovations as sales enablement is a proven, effective tool for organizations. In a Forrester study, organizations with a sales enablement system saw a 25% reduction in ramp up time for new representatives and a 20% lift in commercial results.¹ A CSO Insights report found that organizations with sales enablement solution achieve a 49% win rate against forecasted deals.²

When deciding to implement a sales enablement solution, it's extremely important to know what the latest platforms have to offer, so you don't buy an outdated solution. The investment is a big one that doesn't only affect Sales and Marketing. When implemented correctly, a sales enablement solution and initiative can transform your entire organization and lead to huge success.

But to get those results, it's necessary to choose the right solution. A sales enablement platform will affect many different stakeholders across a wide range of departments. Your Request for Proposal (RFP) should take into consideration many different aspects of how the platform will improve your organization's performance and how it will integrate with the rest of your tech stack.

This guide is designed to provide you with a clear understanding of the facets of a sales enablement solution. Use these questions to guide your assessment of the implementation and your evaluation of the platforms in the market.



¹ <https://www.forrester.com/report/Building+The+Business+Case+For+A+Modern+Sales+Enablement+Toolset/-/E-RES149515>

² <https://www.linkedin.com/business/sales/blog/trends/sales-enablement-big-deal-iss>



#1

Content Management

How does the system promote best practices for sellers?

Best practice is for sellers to source content from approved materials and store content on company systems. Sellers are more likely to stop relying on content from hard drives or cloud drives if they can get better content, faster, from a curated library, and they're more likely to keep content in the system if they can collaborate and manage revisions more efficiently while keeping content linked to the single source of truth. It's important that the user interface make this sourcing and accessing of content easy.

Describe platform capabilities for enabling and automating communications to the field.

Sales, marketing, and corporate leaders need a tool to easily communicate timebound news and information to the right audiences without adding to inbox clutter. At the same time, that tool needs to be easy for them to use so that communicating isn't time-consuming. Both creation of content and its consumption by the field should be simple while providing flexibility to creators so they can present information in the most effective way.

How do content creators get content into the system?

Marketers need the flexibility to easily add and update any type of content from any on-premise or cloud repository to a single, unified library, where they have tools and workflows for enterprise content management. That means support for common, popular content tools like Google Apps, Content Manager, Drive, Microsoft applications, OneDrive, etc.

What is the approach to organizing the content library?

Marketers need to be able to organize content on the back end of the library in one way – a way that makes sense to marketers – and to organize content on the front end in other ways – ways that make sense to different groups of sellers. The right infrastructure is key for marketers to easily deliver completely different experiences for different groups of internal sellers, channel sellers, and other end users.

How is content distributed to the field?

Marketers must have capabilities to efficiently control the universe of content for each group of sellers, to promote content based on roles and responsibilities, and to recommend content for specific buyers and situations.

Describe the strategy and breadth of controls for managing the size and quality of the library.

The solution to managing sales content in rapidly changing market conditions is not to continually make more content available to sellers; the library will get messy and content will degrade over time. To solve the fundamental challenge, marketers must have tools to create, update, govern, and scale content at a global level. One-to-many technology for content control, versioning, and distribution is critical to increasing marketing efficiency and improving content discovery.





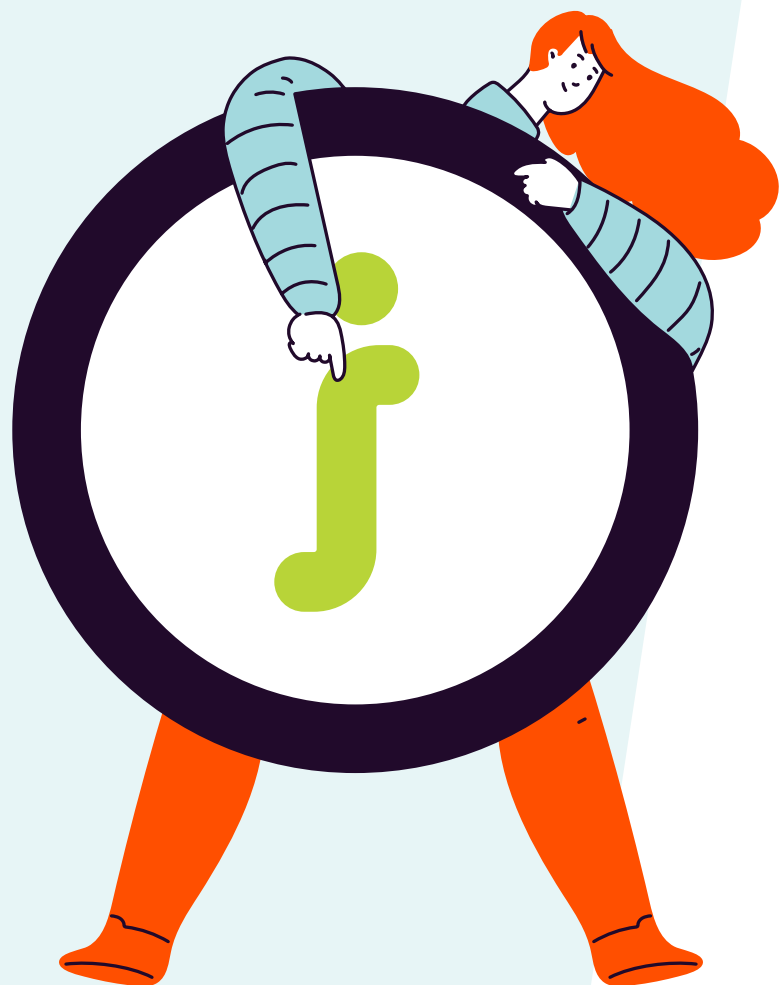
What options are there for sales users to edit content in the library, collaborate, and make their content available to other users?

Great sellers may create their own great content, but marketers must have tools to control the process by which content is added to the library. You need to control the core content while allowing sellers to easily and quickly tailor individual assets for presenting and sending, as well as share their own content.

For instance, marketers should be able to provide core slides and decks that are properly branded and on message, while sellers should be able to pick and choose the slides from different decks, collaborate with other sellers on them, and prepare presentations appropriate for each unique selling situation.

Describe support for interactive content.

Static content isn't enough anymore. Buyers are inundated with more content than ever before and standing out requires something different. Interactive content allows buyers to choose what information to view, dig deeper, or answer questions to see additional data, and provides a more engaging experience that accelerates sales. Modern platforms support creation and sharing of this kind of richer content.



#2

Content discovery and delivery

Describe platform capabilities for enabling content discovery and automating communications to the field.

Sales, marketing, and corporate leaders need an easy-to-use tool to easily communicate timebound news and information to the right audiences, based on roles or teams. It has to support rich content like embedded videos and support custom formatting so they can present information in the most effective manner. Leaders need to be able to select content to promote and make more visible. Similarly, they need to be able to manage the search user interface to tailor it to meet the needs of their organization.

How can sellers find content outside of the application?

Sellers should have convenient access to content wherever they need it; for example, in their CRM (Salesforce, Microsoft Dynamic 365, Oracle, etc.), email (Outlook, Gmail, etc.), sales engagement apps (Outreach, Salesloft, etc.), messaging apps (Slack, Microsoft Teams, etc.), and web browsers (i.e. Chrome).

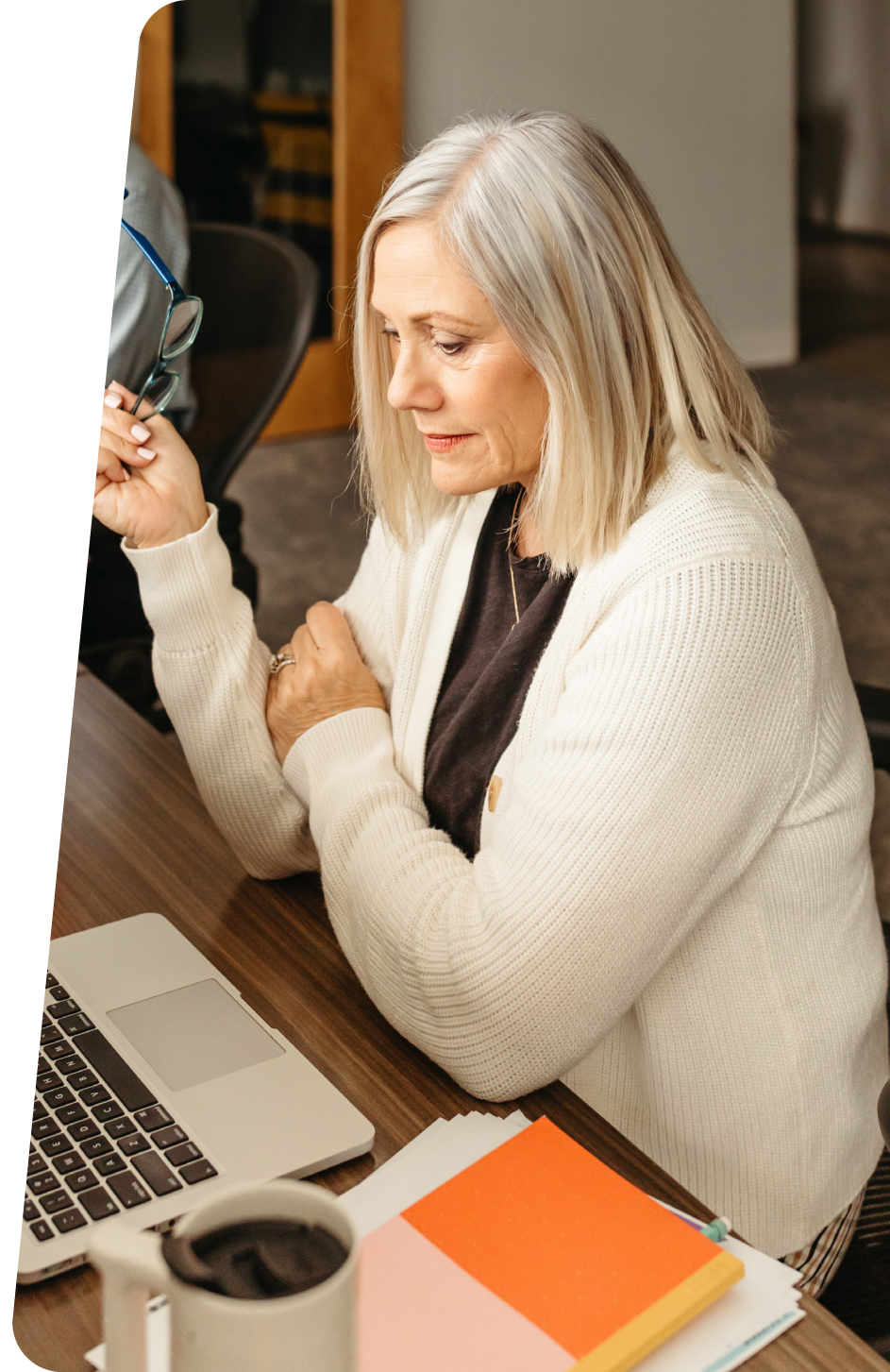
Sellers should also get content recommendations that work for social selling in the apps they use, like LinkedIn, Facebook, and Twitter.

How can sellers share content with prospects and customers?

Sellers should be able to deliver content to prospects and customers with options for password protection, expiration, e-signature, viewing alerts, and page-level engagement tracking. Changing seller practices is a challenge. The more you can work within the tools sellers already use, the greater their adoption of the sales enablement platform. So, sellers should be able to use the tools they are comfortable with, such as Salesforce, Outlook, or Gmail, without losing content tracking capabilities.

How do users find content?

Sellers should be able to find relevant content whether they know what they're looking for, only have an idea, or are just browsing. Preferably, the platform uses the latest AI technology to surface the right content to users, situationally.





How can sellers and other users view information about content engagement?

One of the biggest benefits of sales enablement for sellers is the ability to see whether and how buyers are engaging with the content they share. It's important for the platform to gather that information effortlessly and make it easily available for sellers to see and analyze. That includes easily scannable summary information and detailed information about exactly which content buyers engaged with or downloaded and how much of it the buyer read.

Sellers aren't the only ones who need to see content data. Your platform should use role-based dashboards to make the right information available to the right users across the organization.

How does the platform ensure a good buyer experience?

It's not enough to create and share content. It needs to be delivered in a format that ensures good viewer engagement. Whether it's text, video, or interactive content, recipients should have a consistent, intuitive consumption experience. Buyers should be able to see content on the desktop or their mobile devices, engage with it, and easily share it with colleagues. Ideally, the set of content that a seller shares with a buyer becomes a kind of microsite for that buyer, that can easily be updated by the seller with new, relevant content at any time.



#3

Content Automation

Describe content automation capabilities and use cases supported.

Breaking content into independently managed pieces that can be shared for use in multiple assets enables teams to scale content efficiently to support many products, geographies, industries, teams, and other needs. Ensure that content creators can define content components which can be used across multiple assets and updated once with a cascading effect on the assets created from them.

Describe how the platform enables sellers to personalize content for specific buyers.

A big part of content automation is making it easy for sellers to personalize content. Sellers need to be able to tailor the content that marketing provides. They should be able to easily create a customized version with their customer's information and reflect the industry and language of that customer in the content. Beyond basic personalization, sellers should be able to rearrange the content and hide or add content, as well as include live links to embedded data, such as figures for the particular prospect or the latest corporate data, calculations, spreadsheets, customer stories, logos, and so on. The less work the seller has to do in order to update content, the better.

Describe the extent of the platform's social sharing and engagement capabilities for content.

Increasingly, sales enablement platforms are helping to automate social sharing of content. Today's buyers, including B2B buyers, expect sellers to be on social media. Organizations whose sellers engage broadly on social media are at a competitive advantage. Engagement starts with sharing relevant content, including curated content beyond just the organization's own promotional material. Integrating social selling tools with the content systems of the sales enablement platform makes social engagement seamless and easy for sellers.



#4

Training and Coaching

Does your platform support onboarding, training, and coaching?

Historically, training and coaching, often referred to as “sales readiness,” has been a separate function from sales enablement. But as the concept of enablement continues to evolve, the notional lines between these two practices are getting blurrier. Why shouldn’t ramping and upskilling sellers go hand-in-hand with improving the creation, access, and delivery of the content they leverage? After all, both practices ultimately enable sellers to engage better with buyers.

Many businesses continue to use a disjointed mix of HR cloud software, survey platforms, and email to build and deliver training. Avoid those inefficiencies in favor of a platform that acts as a single source of truth for all your enablement needs, including training and coaching.

Describe your platform’s lesson creation capabilities and features.

Traditional training platforms have a reputation for being difficult to navigate, sometimes taking weeks or months to get a solid grasp of, which in turn leads to less than stellar lessons. A detailed summary of a platform’s functionalities will give you a good idea as to how intuitive and efficient that platform will be for lesson creators and how engaging the lessons will be for learners.

Watch for features such as a drag-and-drop function for building lessons, a variety of interactive elements to choose from like click-to-reveals, flip cards, and quizzes, practice exercises like recordable chat, email, audio call, and video call scenarios—and ensure it’s all mobile friendly.





Describe how your platform can scale without sacrificing the needs of individual learners.

Delivering personalized learning paths that address everyone's unique needs is crucial to cultivating confident, effective, and loyal customer-facing teams. But as your organization grows, it gets harder to maintain that focus. A training and coaching platform should have the power to not only assess each learner's skills and uncover opportunities for personalized coaching plans, but it should also allow for timely feedback—even for hundreds or thousands of employees at a time. To fulfill these needs, the platform should have features that allow you to prioritize learner feedback based on how long they've been waiting for it, aggregate question results so it's easy to identify general strengths and weaknesses, recycle past feedback to eliminate hours of redundant typing, and delegate additional graders when needed.

Describe how your platform can measure the impact of learning.

You can't improve something you're not measuring. Like any other function in an organization, learning should be measured by comparing current metrics to previous ones, and your training and coaching platform should enable you to do that easily and effectively. You should be able to demonstrate how learning has impacted business objectives, revenue, and job-specific metrics. And since collecting this data may require tracking employees through multiple systems, the platform you choose should integrate with other software in your tech stack, like your CRM, call centre software, and others. *(More about this on [Page 15](#).)*

#5

Analytics

How can we evaluate content effectiveness?

Marketers need data to help them better orchestrate content production and curate the library. Sales enablers need answers to questions like who is and isn't active in the platform, who is and isn't leveraging specific assets, and which assets are hard for users to find. Sellers need to understand how buyers are consuming content they've shared, so they can adjust their strategies in real-time to win.

How can we evaluate sales enablement platform effectiveness?

You're making a big investment in your sales enablement platform. You need to be able to evaluate how well it's being used—everything from adoption to the use of specific features of the platform. Leaders and administrators should be able to create dashboards and views based on user roles and customize views to provide specific insights about platform use and user activities.

What data and third-party BI tools does the platform support?

Every organization is different, which is why your sales enablement platform should allow customization of its reports and dashboards, support a variety of popular BI tools (such as Tableau, Domo, or PowerBI), enable you to combine the platform data with other data sets, and have a rich set of APIs so you can roll your own reporting solutions.





#6 Integrations and APIs

How does the platform integrate with other common tools in the tech stack?

The platform should play nice and integrate with the systems you use in your organization to automate tasks, get reports, onboard and train new team members, engage with buyers, and perform core business activities. From CRMs and sales engagement platforms like Salesforce and Outreach to sales readiness solutions like Brainshark, MindTickle, and Lessonly, to Google apps, Microsoft apps, and beyond, you want a platform that will allow you to add and expand your tech stack in the future without hitting integration roadblocks.



#7 Globalization, Security, and Accessibility

Describe platform capabilities for supporting global audiences.

If your company is global—or aspires to be—you'll need a platform that complies with GDPR and similar requirements and supports multiple languages. The platform should enable sellers to send content in a manner that enables tracking while also meeting GDPR and other privacy requirements. Given the varied regional requirements, organizations should be able to include multiple privacy policy links.

Describe platform capabilities to support system resiliency.

As a key system, your sales enablement platform should be architected to support global use and ensure continuous operation. That means multiple, redundant instances and active geo-replication of data and databases. The vendor should have a documented and tested Disaster Recovery Plan that can recover customer tenants within hours to ensure minimal downtime.

Describe platform security capabilities.

Your vendor should secure data through defined sensitivity levels and by determining access through labeling and safe data handling guidelines. Access to the platform should be managed by single sign-on or SAML 2.0 IdP with appropriate encryption/hashing on backend servers. Look for administrator control of passwords and accounts as well as provisioning and deprovisioning. And ensure the vendor and platform meets common security guidelines such as ISO 27002, as well as industry standards and regulations. The vendor should also be subject to standardized, independent assessments, such as SOC2 Type II assessments.

Describe how the platform meets Web Content Accessibility Guidelines (WCAG).

Supporting accessibility guidelines gives your content a wider audience and helps build your corporate reputation. Make sure your platform has the flexibility and capabilities to meet WCAG compliance.





#8

Company and momentum

What problem was your software built to solve?

Identifying the primary problem a system was built to solve can provide insight into functional strengths and weaknesses and into core alignment with fundamental goals and objectives.

What year was your software launched?

Launch dates provide a basis for assessing the comparative growth and market strength of different vendors.

What year was your software launched?

Strong customer growth and retention are indicators that a vendor provides a great product and service that meet the needs of customers. Happy customers buy more, and they recommend the product/service to others.

Check the box in each column below for the number of employees the company has had in each of the last three calendar years, and the current year.

Your vendor should secure data through defined sensitivity levels and by determining access through labeling and safe data handling guidelines.

Number of employees	3 years ago	2 years ago	Last year	YTD
> 1,000				
900-999				
800-899				
700-799				
600-699				
500-599				
400-499				
300-399				
200-299				
100-199				
0-99				





Which cities do you have office locations with more than 5 employees?

Global footprint is a great indicator of how well-positioned a vendor is to scale with organizations as they grow, from localization in the product itself, to account resources, to support customers with global operations.

Regions	Cities with offices staffing > 5 employees
North America	
EMEA	
APAC	

What percentage of your total employees are dedicated to each of the following areas?

Size makes a difference for customer success and support teams, and size matters for product teams too. How vendors allocate resources is an indication of how they prioritize customer acquisition, customer satisfaction, and product innovation.

Departments / division	*Percentage of employee base
Sales and marketing	
Customer success and support	
Product development	
Other	

**Numbers above should total 100%*

List product innovations released in the past 24 months. Limit list to major features and capabilities.

History is the best indicator of whether a vendor will deliver on roadmap promises and keep pace with advancing technology and market needs; innovation is not to be confused with routine updates, patches, and bug fixes.

List new features and capabilities scheduled for GA release within the next 60 days?

Lack of enhancements on the short-term roadmap may mean a vendor is not innovating at a rapid pace. If enhancements are scheduled, follow up to confirm delivery. Ask to see release notes.

How is customer feedback collected, and how does it influence the roadmap?

A feedback loop and mature planning processes are critical for product developers to successfully identify, prioritize, and deliver on customer requests.

What evidence is there that customers are satisfied with the product?

High customer retention rates, positive customer reviews, and concrete examples of customer growth and product-related gains all demonstrate that the product/service works as promised.





What evidence is there that industry analysts and other third parties regard the company as a market leader?

Analyst recognition and industry awards provide independent validation of product strength, market strategy, and other measures of vendor positioning in the marketplace.

What do you believe are the top three differentiations of your product?

Self-identified differentiators may reveal areas where buyers need to ensure a full understanding of comparative strengths and weaknesses.

Why should we choose you?

Vendors' answers should reflect an understanding of your needs and how their unique strengths align to your specific requirements.



Conclusion

As a growing industry, sales enablement capabilities and technologies are constantly improving and expanding.

Sales enablement as a strategic organizational function is changing everyday. This poses a great opportunity and a great challenge: your sales and marketing teams will ultimately be well-equipped to work effectively and efficiently, but it can be hard to keep up with these technologies and invest successfully. It's important to think ahead to where sales enablement—and your organization—will be in a year or more, so you can invest in the right

solution that will support your company down the road. Your organization will undoubtedly have its own specific needs and priorities while evaluating sales enablement solutions, some of which may not be listed above. But these RFP questions should assist you during the evaluation and selection process of the right sales enablement solution for your organization today, and as you continue to grow.

To learn more, [Speak with our team.](#)





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