

Building Your RevOps Tech Stack

Stephanie Bennett

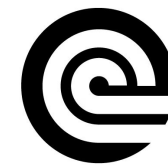
My Experience in RevOps



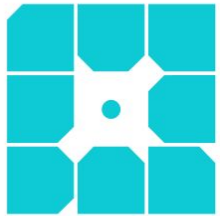
Fleetio



bold



rev



WPengine[®]



A CLOUD GURU

 **DealerSocket**[®]

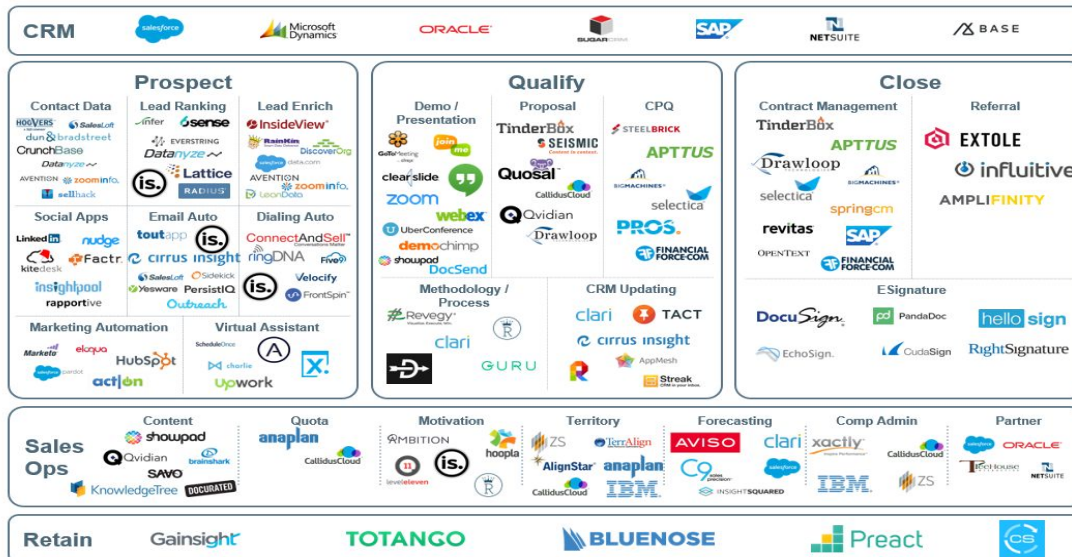




Copyright © 2018 Marketing Technology Media, LLC. See <http://chiefmartec.com/2018/04/marketing-technology-landscape-supergraphic-2018/> for details and sources.

Produced by Scott Brinker (@chiefmartec), Anand Thaker (@AnandThaker), and Blue Green Brands.

Sales Technology Landscape



Note: Landscape is not exhaustive

What areas of sales and marketing can be covered with tooling?

The areas of sales and marketing that can be covered with tooling include:



Core sales and marketing systems



Sales Development



Lead management



Sales enablement & Training



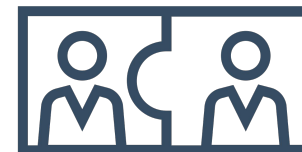
Communication & Demo



Deal Management



Data & Analytics



Affiliate & Partner management

Core Sales & Marketing Systems

CRM



HubSpot

pipedrive

Marketing Automation

HubSpot

eloqua



Marketo

Core Sales & Marketing Systems

CRM



Marketing Automation



Tips for setting up your CRM

- Start early
- Be thoughtful about integrations (INTEGRATION USERS!)
- Beware overwritten data
- Sometimes best-of-breed tools are better than what your CRM offers

Core Sales & Marketing Systems

CRM



Marketing Automation



Tips for setting up your Marketing Automation System

- Standardize an MQL identification & tracking process
 - **HOT TIP:** Don't use the Lead/Contact Status field to identify MQLs.
- Use the web forms from your marketing automation for the simplest lead tracking

Sales Development

Prospecting & Data Enrichment



Clearbit



zoominfo



Outreach



Outreach

Salesloft.

HubSpot

Autodialer

RingCentral

dialpad

Sales Development

Prospecting & Data Enrichment



Clearbit



zoominfo



Outreach



Outreach

Salesloft.

HubSpot

Autodialer

RingCentral

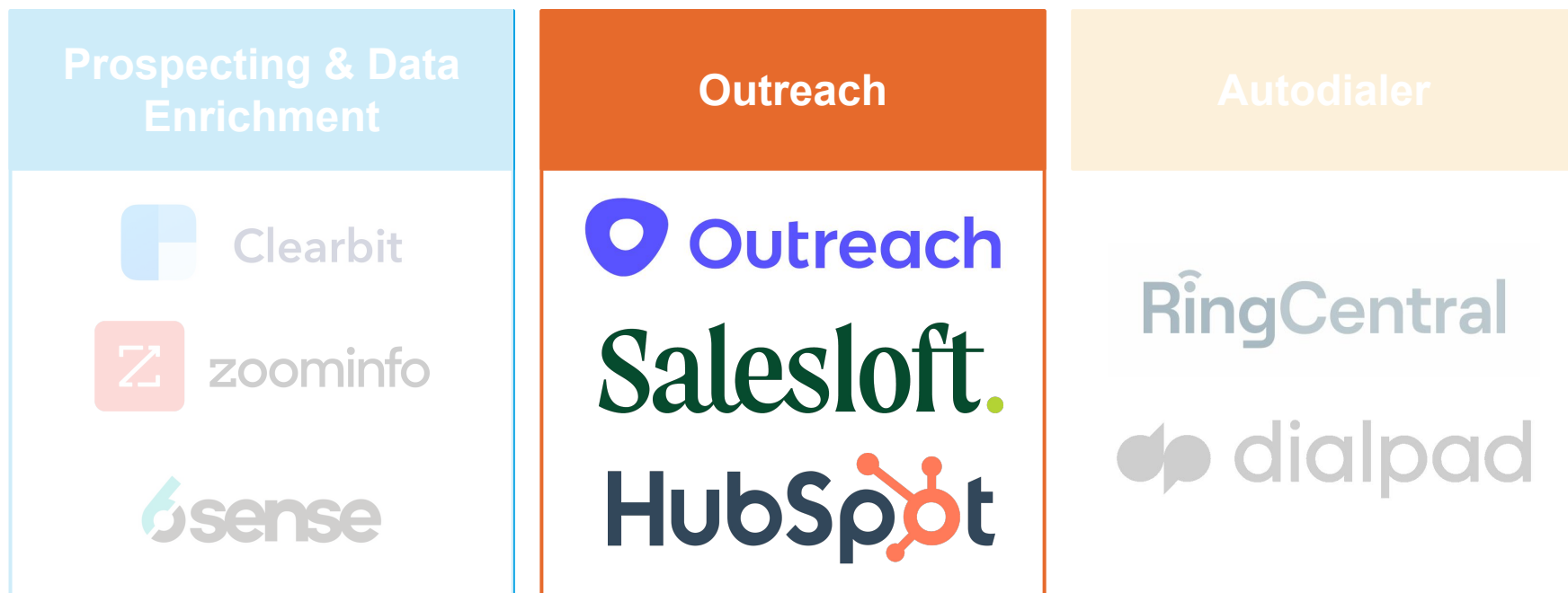


dialpad

Tips for setting up Prospecting & Data Enrichment Tools

- Make sure you have an understanding of your ICP & location, different prospecting tools perform better in different locations & market segments.
- If you are using multiple enrichment solutions beware of overwriting data & set source of truth for certain data points.

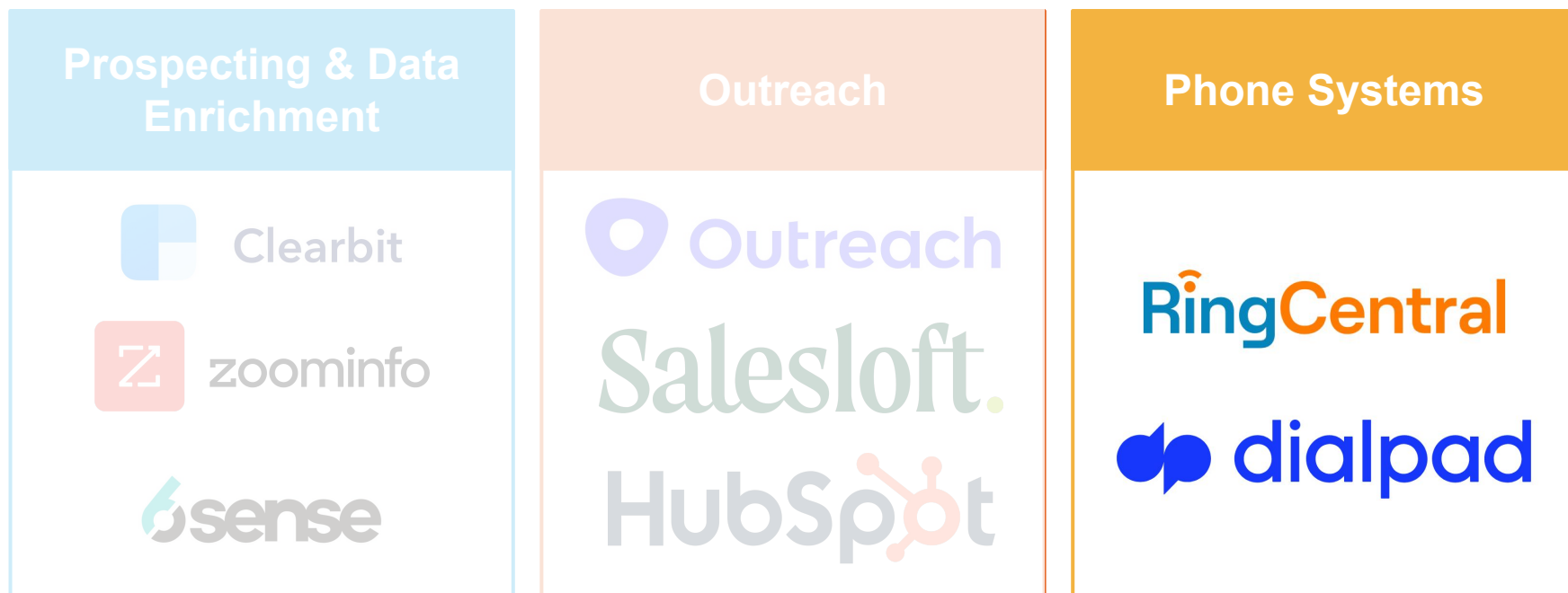
Sales Development



Tips for setting up Outreach Tools

- These tools offer a lot of automation options, integration with your CRM & but don't over automate right from the start
- Make sure data quality is solid before you automate outreach, last thing you want is to send an email using a Merge Field with bad data
 - Dear [[UNKNOWN]] is not going to help you convert prospects

Sales Development



Tips for setting up Autodialer Tools

- Find a tool that caters to the team that's using it (support vs. sales)
 - Often times these are different tools based on the needs of the department. Think call trees/queues, VM routing, etc...
- Integrate with CRM to track activity
 - **HOT TIP:** Activity tracking is one area that can get messy really quick with the amount of tools that can log activity. Be thoughtful about this, just because something can integrate doesn't mean it should.

Lead Management

Chat

 LiveChat

DR⚡FT

Attribution

 Attribution

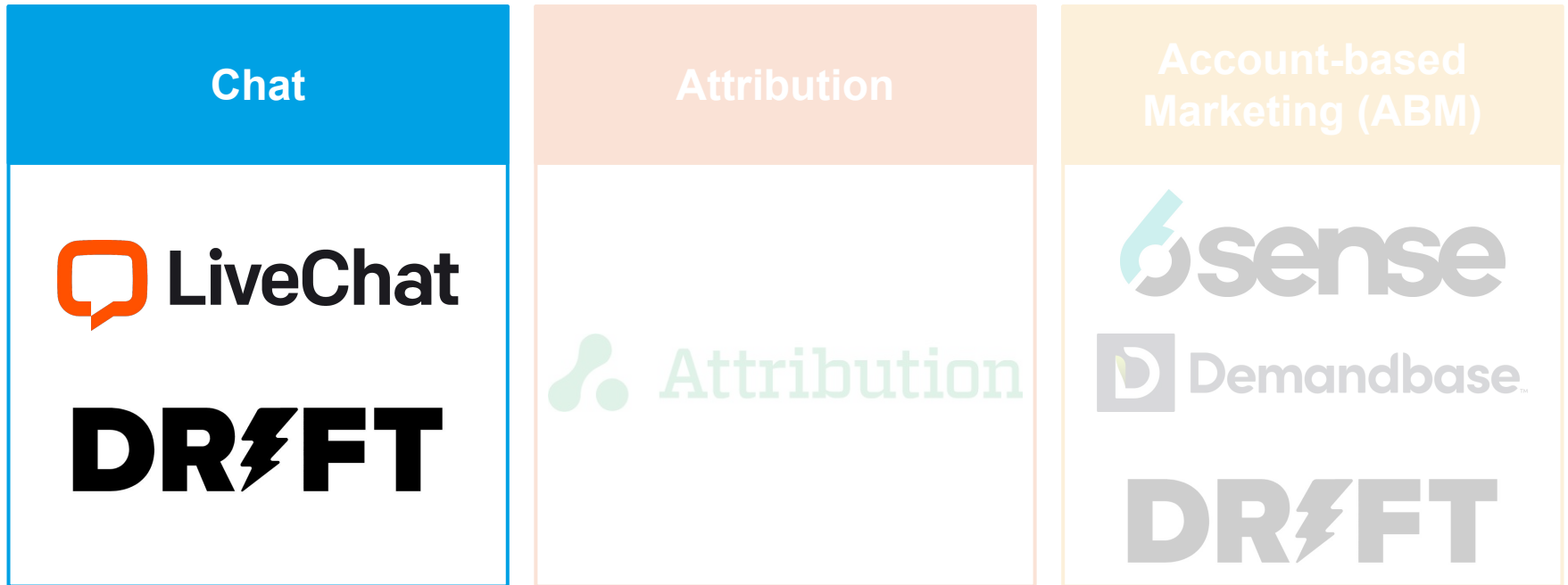
Account-based Marketing (ABM)

 sense

 Demandbase™

DR⚡FT

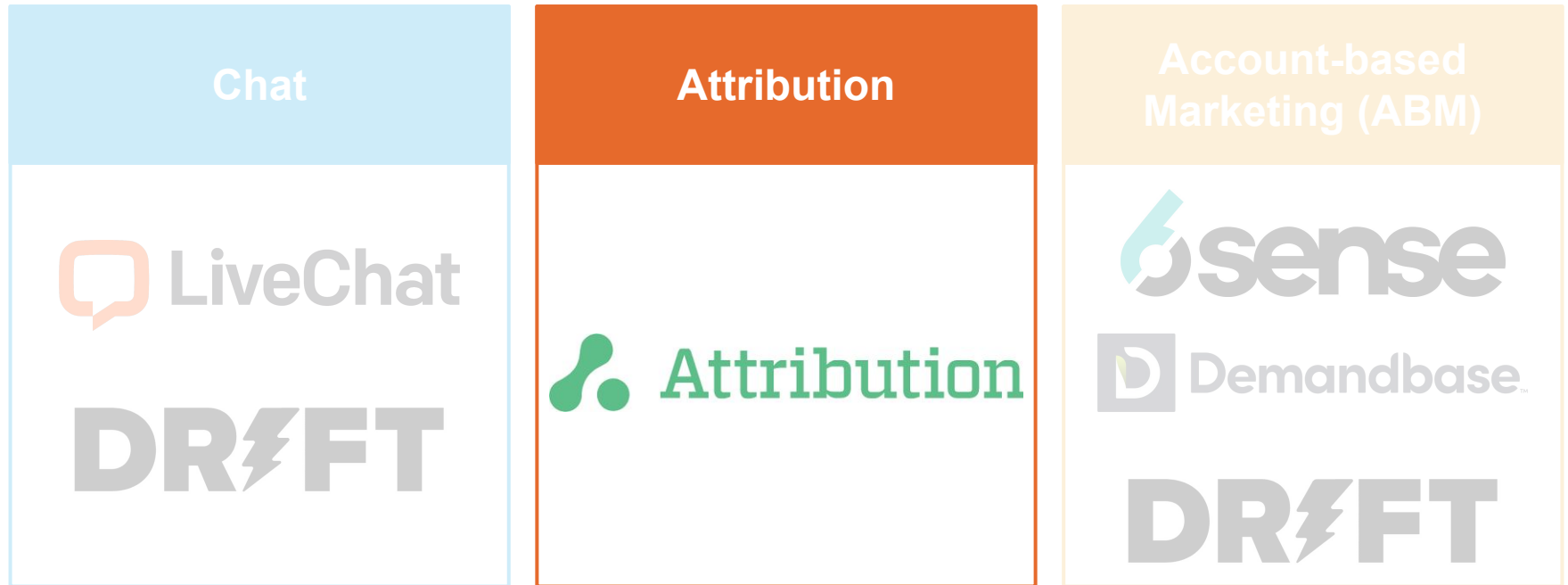
Chat



Tips for chat tools:

- Start by using your marketing automation tool, most offer a Chat Lite and you can set up some easy chat bots to help direct traffic & drive sales with minimal resources/support.
- Use different purpose-built systems for Sales and Support chat, same with phone systems there are often times different need.
 - Ex: Drift is an amazing and powerful tool for MKTG/Sales but they aren't great at filling the needs of a support organization

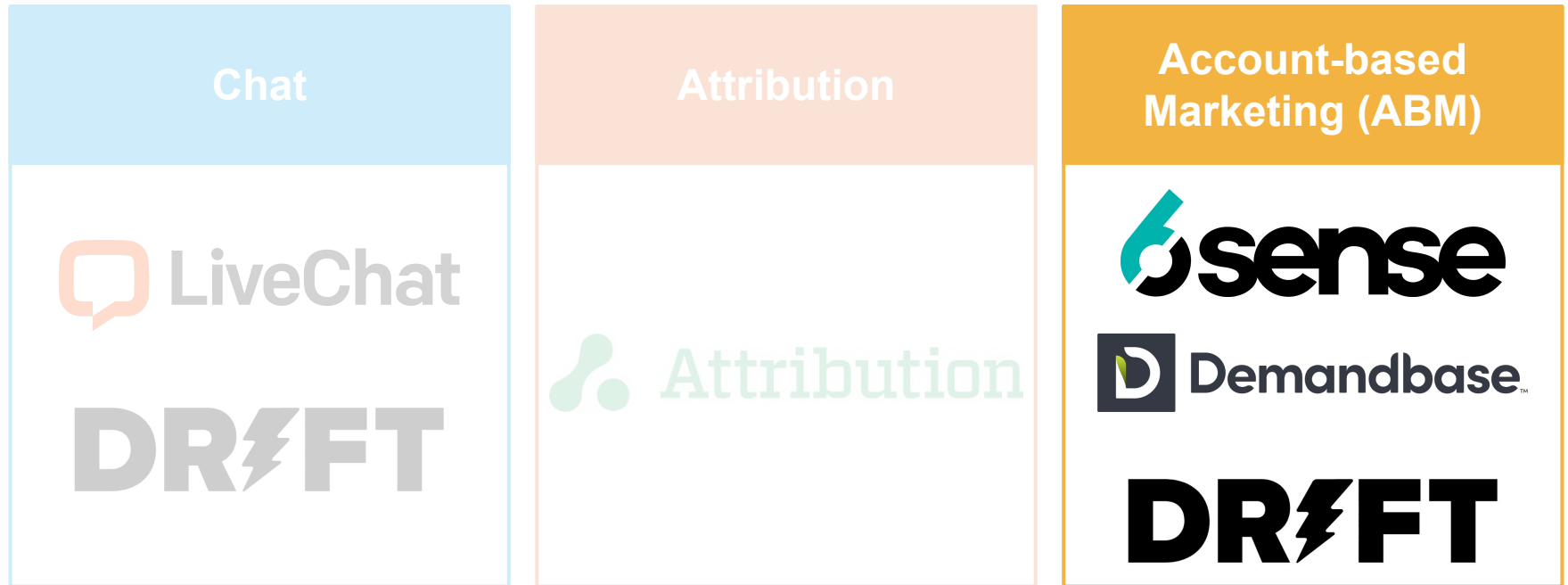
Attribution



Tips for setting up attribution tools:

- [Be consistent with website event naming conventions](#)
- Attribution is tough and no company has truly mastered it (Looking at you AWS and Google). A system like Attribution App can help as you're starting out but for complex attribution models, most companies will end up modeling & building in house.

Account-based Marketing (ABM)



Tips for account-based marketing:

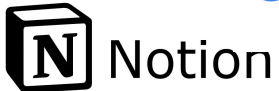
- When selecting an ABM tool outline the capabilities that are a must have vs. nice to have and evaluate what systems fit your needs the best
- ABM can be a powerful marketing tool & assist with Sales Outbound initiatives but is a nice to have especially if you are still identifying your TAM & ICP.

Sales Enablement & Training

Enablement



CHORUS



Call analytics

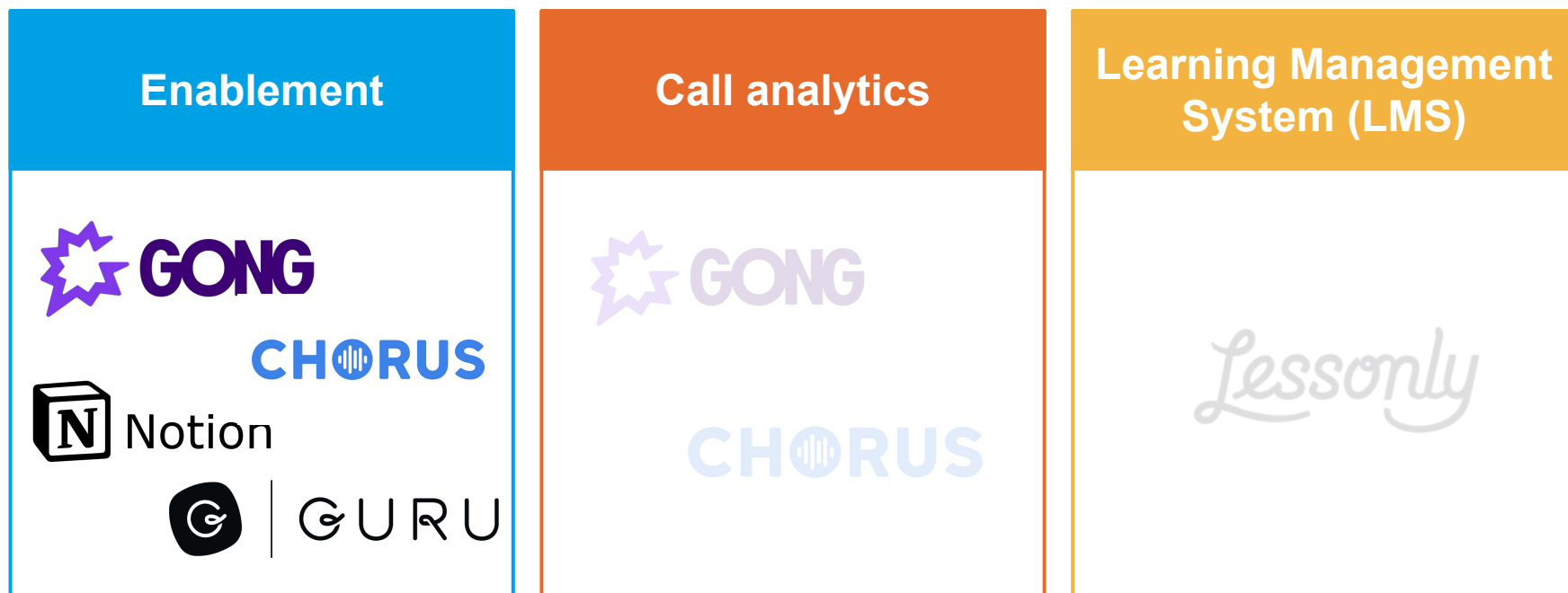


CHORUS

Learning Management System (LMS)

Lessonly

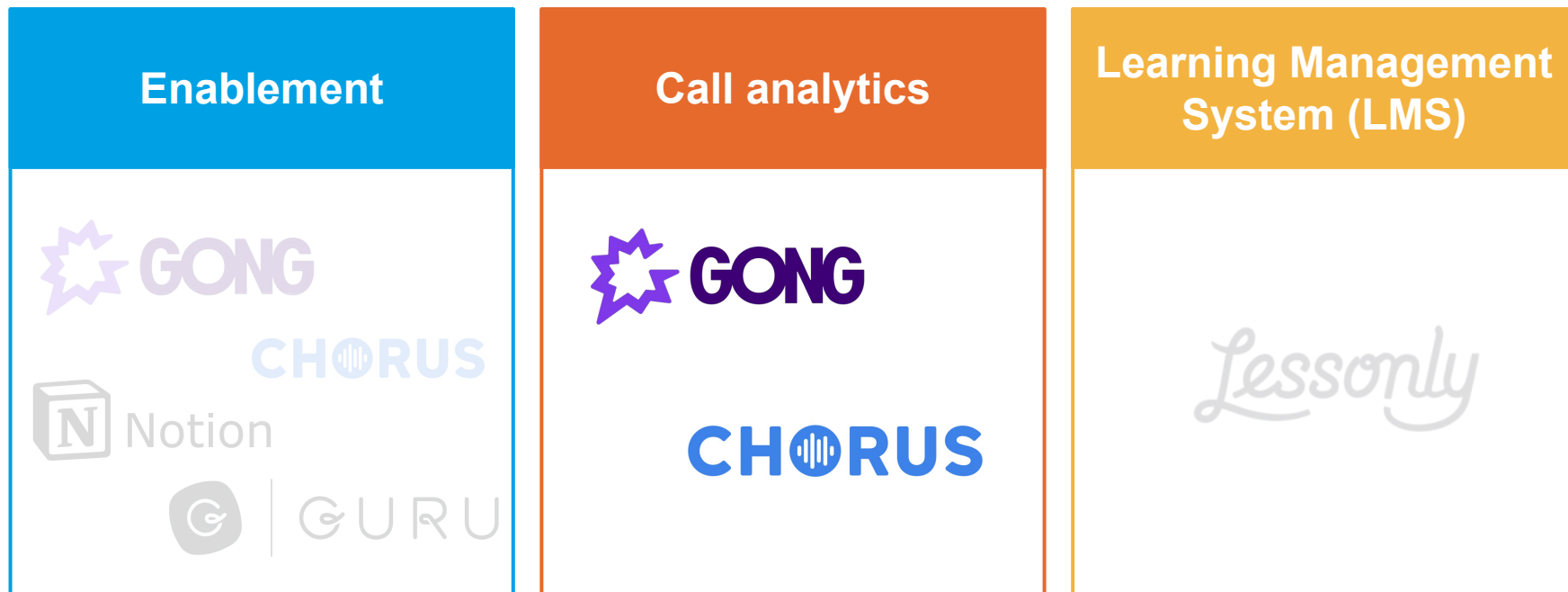
Sales Enablement & Training



Tips for setting up enablement:

- When working with sellers, enablement as early as possible is key. It doesn't have to be expensive or have all the systems with all the bells & whistles. Something as simple as using Notion or Google Drive can set you up for the future.
- As you grow these other systems can become critical to helping identify gaps in your sales process that you would otherwise miss.

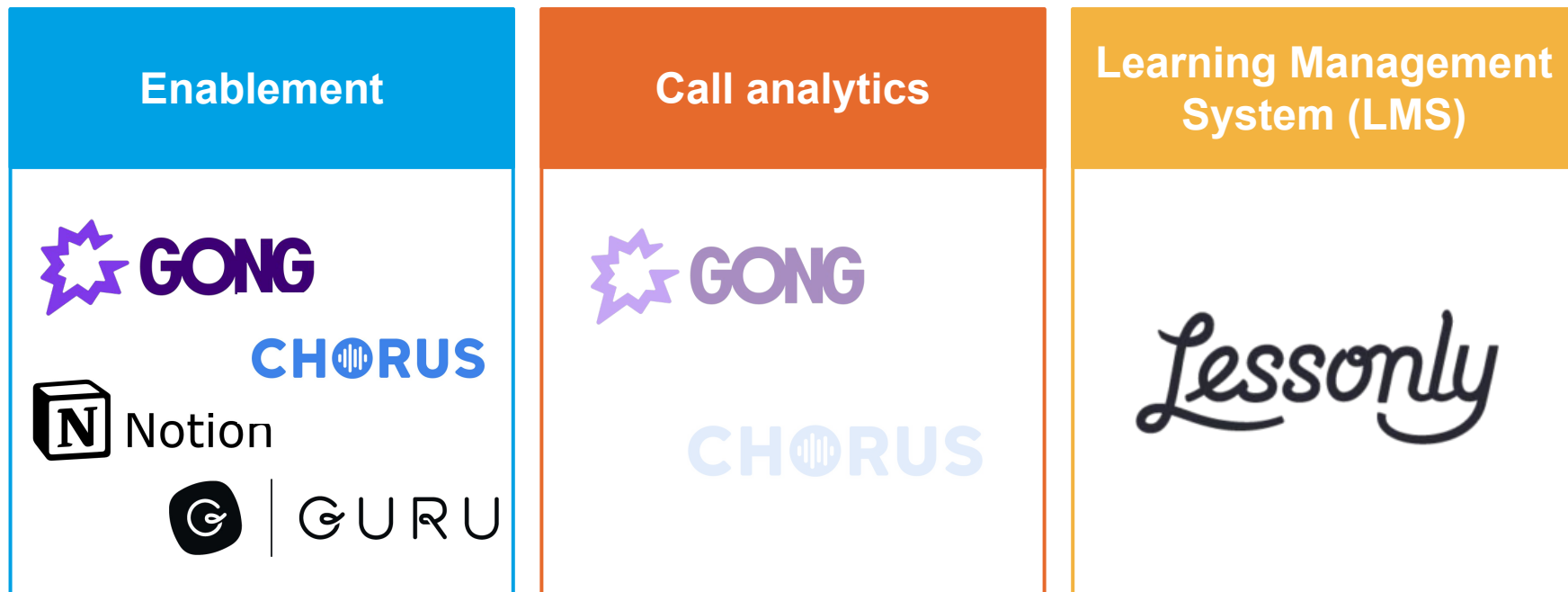
Sales Enablement & Training



Tips for setting up call analytics tools:

- Use keywords to tag calls & organize into files to make easier for your teams to use as a resource
- Set up cadence to regularly review calls (not just for sales)

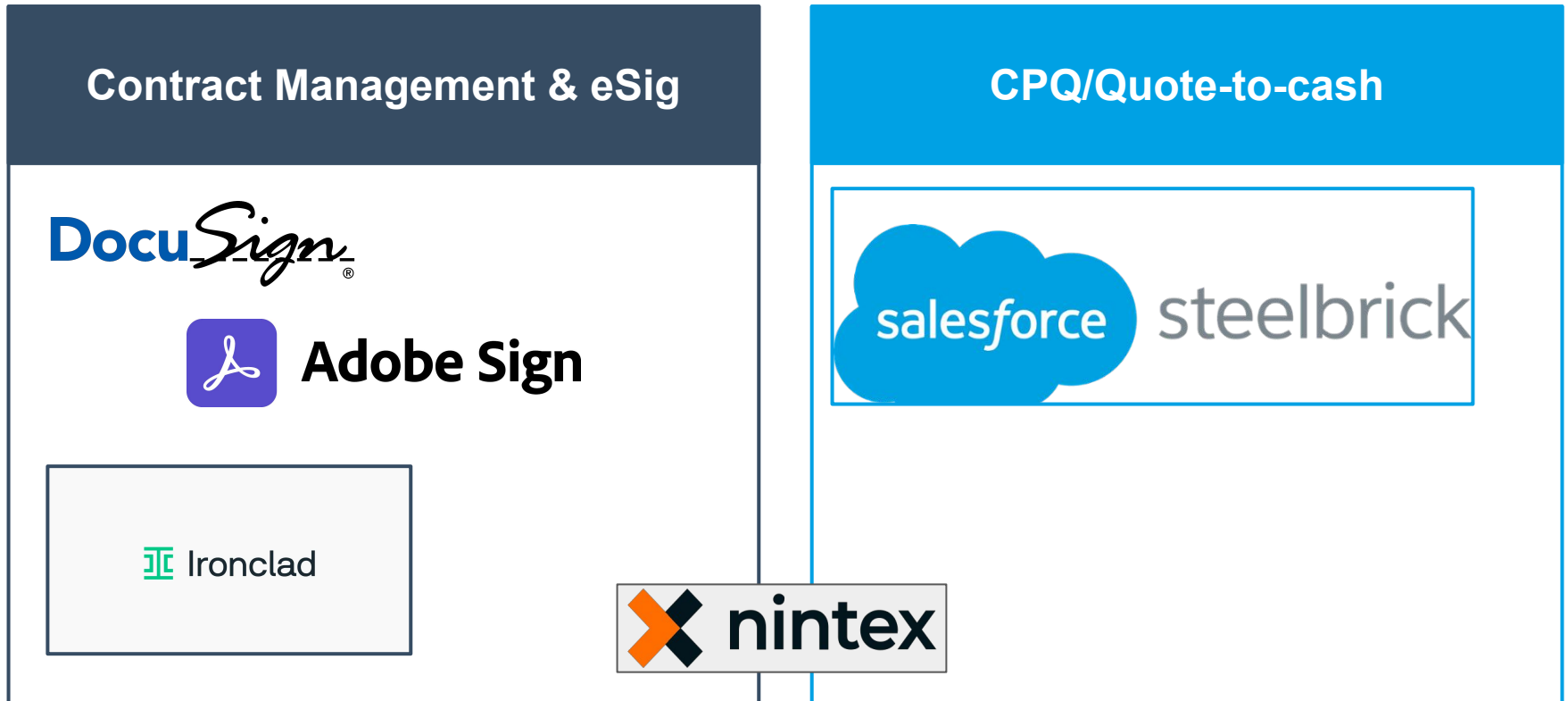
Sales Enablement & Training



Tips for LMS tools:

- Learn, Practice & Coach - make sure you are dialing in and coaching. Most companies skip this part or simply do not know how.
- You want to build multi-layered programs vs. a high-level outline of a process.
 - Sales Outbouding

Deal Management



Tips for Contract Mgmt, eSig & CPQ

- CPQ, most often is not necessary, especially for smaller companies. It's overly complicated and expensive. That is where "Not CPQ, CPQ" comes in.

Data & Analytics

BI (Business Intelligence)



Dashboard



Data & Analytics

BI (Business Intelligence)



Dashboard



Stages of Data Analytics Tools:

- Bridge the gap to a data analytics team with outreach tools or Atrium
- Eventually, build out a data warehouse and a Data Analytics & Engineering team
 - A data engineer is going to be a different skill set than a software engineer.
- Launch a BI Tool

Data & Analytics

BI (Business Intelligence)



Dashboard



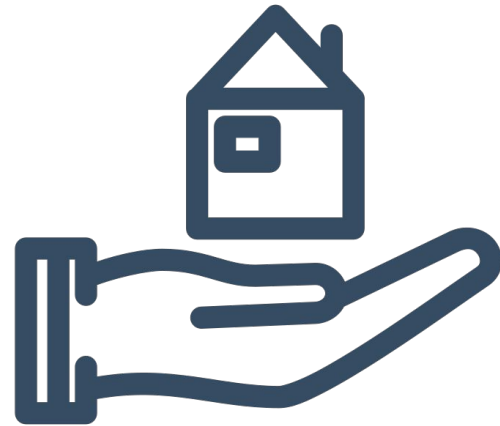
Stages of Data Analytics Tools:

- Put sales dashboards wherever reps spend their day (typically your CRM)
- Put company-wide dashboards in your BI tool
- Be aware of licensing

What portion of your sales and marketing budget should you set aside for tooling?



**An early-stage company
should be careful with
tooling spend**



**Try to problem-solve with
in-house tools**

What resources can you refer to when evaluating and selecting your sales function tooling?

Evaluate tools using the following:

1

Review sites, Gartner, testimonials, and people in your network

2

Any blog posts the company has written about competitors

3

The tool's security situation

***Seek solutions to your problems,
not just tools you know and prefer***

What are the most important pieces to get right?

Set up a good foundation of processes before starting with automation



Develop a clean and well-defined pipeline tracking system



Your customer journey should guide your tech stack—not the other way around

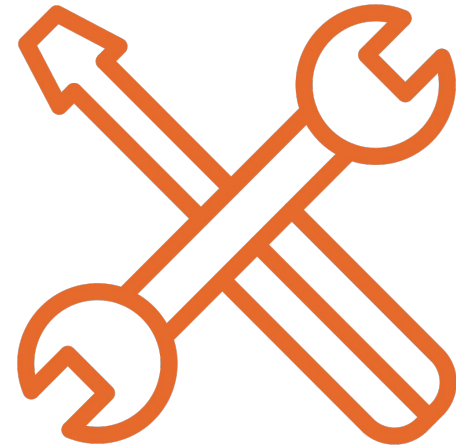


What are common pitfalls?

Over-automating



**Integrating your tools with
your actual product**





Questions