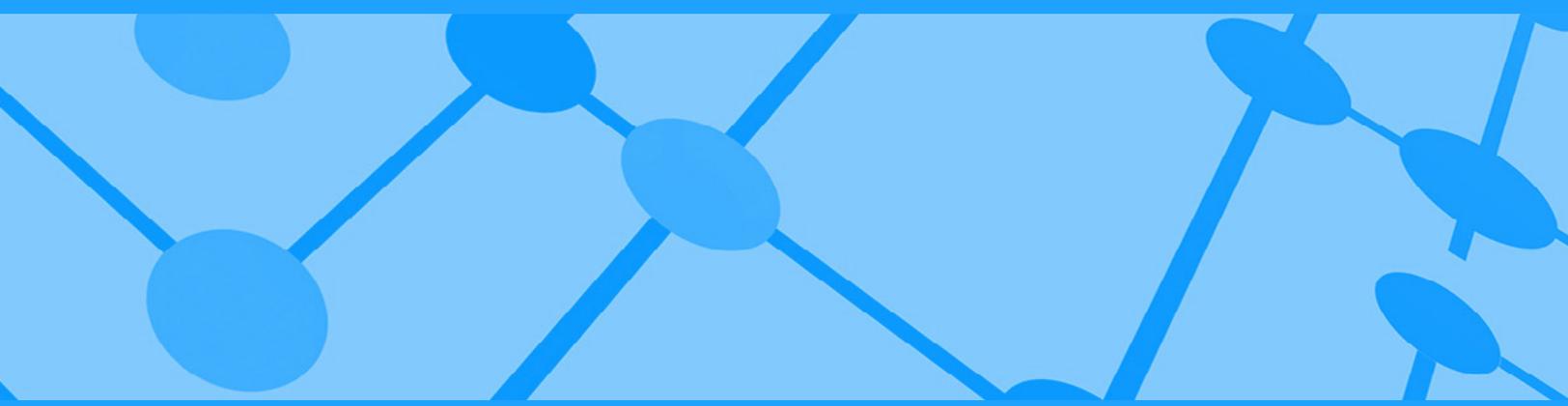
A background graphic of a network diagram with blue nodes and lines, receding into the distance.

# **HOW TO SECURE CROSS-COMPANY BUY-IN FOR A NEW SALES ACCELERATION TOOL**

A background graphic of a network diagram with blue nodes and lines, receding into the distance.

**outreach**



**A**s the person charged with driving your company's sales, you know that automating the most time-consuming parts of your sales process makes good business sense. But even though you are convinced of the value of streamlining and scaling your team's outreach efforts, you may still need to persuade some of your colleagues of the value. This guide will help you do just that. Calling upon our experience selling to hundreds of sales organizations with at least 50 reps, we've distilled best practices and proven ways to secure support across your organization. Read on for guidance on how to:

- ▶ Present a strong business case to the C-suite
- ▶ Partner with IT
- ▶ Make the CISO feel secure
- ▶ Satisfy procurement
- ▶ Confirm support before and after the sale



## **PRESENT A STRONG BUSINESS CASE TO THE C-SUITE**

You'll need to present a compelling business case for any new, significant technology spend. Your CEO and CFO in particular will want to be certain that the tool can help your company address its strategic agenda without interrupting current business operations. First, clearly explain what major business-related problem the tool solves. For example, are you struggling to increase market share because your sales team is challenged with its "hunting" behaviors? Do you need to better upsell current customers or report the quality of sales activity?

In your business case, underscore how the tool can help your company address the problem in a way that fits well with existing processes or by helping it change sales rep behavior for the better.

Once you've outlined the problem the tool addresses, show the average and potential business return. Ideally the tool vendor will help you with this calculation. But look beyond a simple online ROI calculator and instead seek a vendor that walks you through a discovery session with the goal of quantifying the value of using their solution in your environment.

**LOOK FOR A VENDOR  
WITH FINANCIAL  
ANALYSTS – OR "VALUE  
CREATION CONSULTANTS"  
– ON STAFF TO HELP  
DEVELOP THE BUSINESS  
CASE ON YOUR BEHALF.**

## **ADDRESS THE ADOPTION CHALLENGE**

Even with a proven tool addressing a valid business issue, adoption can be challenging – sales professionals are incessantly introduced to new products aimed at helping them sell better. And your CEO and CFO know that adoption is a key part of the ROI equation. Vendors sober to that fact take measures to facilitate adoption of their solution.

Look for a vendor that offers a customer adoption framework, ideally one that customizes its approach given your organization's stage of adoption. Moreover, the vendor should dedicate resources tasked with the prime directive of gaining adoption of the product. They could accomplish this through a series of tactics such as one-on-one trainings, group trainings, usage monitoring and proactive outreach. The best approach also allows users to learn the product at their own pace while achieving success. At the same time, the vendor should help grow the skillsets of users from basic to advanced while also matching new features and products with the expanding needs of your organization.

**ASK THE VENDOR FOR A FREE OR REDUCED-COST TRIAL  
SO YOU CAN RUN A THREE-MONTH PROOF OF CONCEPT  
AND BUILD A TEAM OF INTERNAL ADVOCATES  
FOR THE NEW TOOL.**

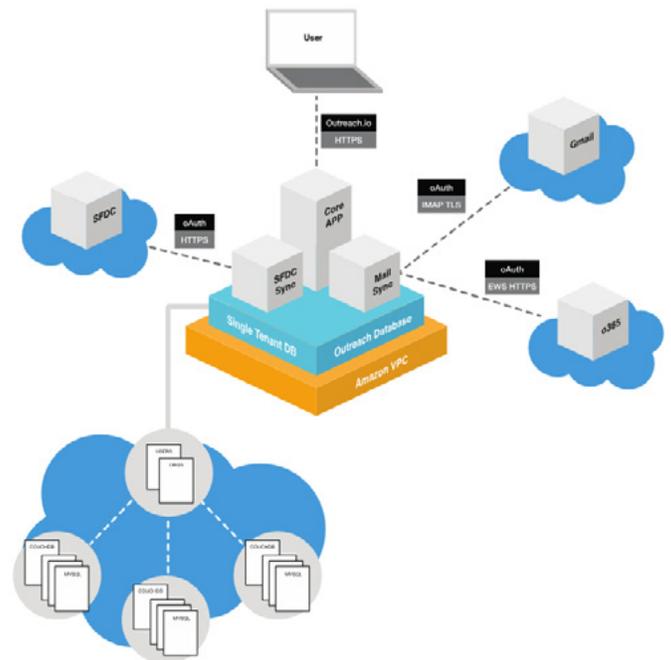
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## PARTNER WITH IT

With the rise of BYOD and cloud-based apps, more and more business users are circumventing their IT colleagues as they select and install solutions. But the best approach is to make IT the sales group's ally so that IT will be incented to facilitate the successful installation and usage of the solution. You can achieve this level of collaboration by positioning IT as a business enabler rather than merely as the group tasked with keeping the lights on, so to speak. By procuring budget from the business side of the organization to engage a solid vendor and proven solution, you can augment IT's contribution to the business.

### UNDERSTAND THE LEVEL OF INTEGRATION WITH EXISTING SYSTEMS

Hand in hand with the IT department, be certain to determine the level of integration the solution enables with your existing system of record. Any effective sales acceleration tool will require access to your organization's customer relationship management (CRM) system and perhaps even other communication systems such as email. Most sales acceleration tools can sync activity and update a certain set of records. However, if your organization connects its CRM system with multiple downstream systems, including marketing automation, you'll want a sales acceleration solution that supports bi-synchronous updates customized to your requirements.





Find out if the solution can update information in your CRM system at the field level. Specifically, make sure you can create rules that determine what information goes into and out of a field, in what order, and what gets overridden and by whom. The last thing you want is the data in your CRM system getting polluted because of the new tool. Make sure the solution can determine the rules by which each of the fields and objects get updated as they move from the tool to the sales source (i.e., CRM) and back.

## **TRY IT FOR YOURSELF**

To that end, a trial or pilot with a small group of users is critical. Identify and recruit the right cross-section of people to make sure the tool addresses your organization's needs and isn't too cumbersome to use or too hard to manage from a change management perspective. If your organization chooses not to run a pilot, it should at least test the tool to confirm it doesn't result in negative impacts to the existing interconnected technology deployments.

**SOME TOOLS WORK WELL AS STANDALONES BUT MAY  
CREATE PROBLEMS THAT AREN'T WORTH THE INVESTMENT  
ONCE INTRODUCED INTO AN ECOSYSTEM  
OF OTHER TOOLS.**



## **MAKE THE CISO FEEL SECURE**

Because the data in your existing systems of record – e.g., your email, phone system, CRM and marketing automation systems – is very sensitive, it's critical that the new tool includes security and privacy controls. To that end, it's important to consider a number of aspects when evaluating the security effectiveness of the sales acceleration tool.

Most enterprises are very conservative when it comes to information security, especially around sensitive and personally identifiable information (PII). Be aware that you'll often need blessings from your IT, Information Security and/or Legal teams to ensure any new tools meet your company's security and privacy requirements. Often these requirements are evaluated as part of a vendor assessment.

While a security assessment can add significant time to the purchase cycle, this is a requirement in most enterprises. One way to accelerate the process is to loop in IT and Security early in the process. Better yet, build relationships with your Security and IT teams to gain an understanding of the risks they are trying to mitigate and to help them understand the needs of the sales team. This mutual understanding will go a long way to getting the security assessment prioritized.

## **LOOK FOR SECURITY AND ACCESS CONTROLS**

As mentioned above, an effective sales acceleration tool will be accessing your CRM system and therefore will be reading your customer records. Whenever you are trusting a third party with your customer data or PII, your organization must satisfy certain requirements.

A key feature to look for in a sales acceleration tool is governance, which allows you to define and enable limits on what your users, administrative staff and managers can do when accessing certain data. Most of these users will already be bound to a set of canonical roles and the permission framework in your CRM system. The tool vendor must at least mimic these roles and controls when integrating with the CRM system.

Without a framework for roles and permissions, you could lose control over the language used and frequency at which users communicate through the tool. This can be problematic if it conflicts with your current sales touch sequences, leading to prospects and leads being blasted with communications. A lack of safety controls can also damage your company's reputation and may even get your company email servers tagged as spamming engines. And, that's the last thing a sales team needs on its hands.

## IS THE VENDOR CERTIFIED?

Industry-standard security certifications are an excellent way for vendors to demonstrate the effectiveness of their security controls. First, be sure to validate that the vendor has in place a formal Information Security Policy, such as one based on ISO 27001. To earn this certification, the vendor must also dedicate a person or department to information security. This could be a Director of Security, a CISO, or someone else within IT and should report directly to, or within a couple levels of, a C-level or VP within the company. This person or department is in charge of ensuring security policies, standards and procedures are communicated and enforced internally.

While ISO 27001 provides assurances that the vendor takes security seriously, it is only a point-in-time assessment. Although companies must recertify annually, the certification only determines whether the security requirements are being met during the certification audit. For deeper assurance the vendor you're evaluating is operating its security effectively over time, look for a Service Organization Controls (SOC) 2 Type II certification.

**ISO 270001 CERTIFICATION IS AN EXCELLENT INDICATOR THAT THE VENDOR HAS INTEGRATED SECURITY INTO ITS BUSINESS PROCESSES AND OPERATIONS.**

**NOTE THAT A SOC 2 ASKS THE VENDOR TO ASSERT TO A SET OF TRUST PRINCIPLES. WHILE ASSERTION TO MOST OF THE PRINCIPLES IS OPTIONAL, IT'S MANDATORY TO MEET TO EACH SECURITY REQUIREMENT.**

If you are trusting your organization's data to a sales acceleration tool, you'll want to ensure the vendor is taking Availability and Confidentiality into consideration as well. The key to SOC 2 Type II certification is that it requires a company to demonstrate that it has effectively operated against its security controls over a period of six months. Then, every six months the company is re-evaluated against those controls. This burden of proof cadence should give you the confidence that the vendor can and is protecting your data. If your company is in the healthcare or finance industry, you may require the vendor provide additional certifications before you can share your data with it.

**IF SECURITY IS BURIED  
WITHIN THE ORGANIZATION  
– I.E., NOT GIVEN A  
PROMINENT POSITION IN  
THE ORG CHART – THERE'S  
A GOOD CHANCE IT IS AN  
AFTERTHOUGHT FOR  
THE VENDOR.**

## **ASK FOR DOCUMENTATION**

To further confirm the security vendor's commitment to security, sign a non-disclosure agreement (NDA) and ask it to provide security architecture and data flow diagrams and regular penetration



test reports. The vendor you are evaluating should be able to show you all of these documents. If you request the SOC 2 Type II

report, it will often include these other documents. At some point in the vendor

evaluation process, someone in your organization – either IT staff or security – will ask you for this information. The better prepared you are with it, the quicker you'll be able to purchase the tool you need to improve your sales process.

**YOU CAN OFTEN ELIMINATE  
A VENDOR ASSESSMENT  
BY YOUR IT OR SECURITY  
TEAM IF INSTEAD YOU CAN  
PROVIDE THE VENDOR'S  
SOC 2 REPORT AS  
A SUBSTITUTE.**



## **SATISFY PROCUREMENT**

If your company is like most, it undergoes a formal procurement process and issues an RFP when considering a strategic purchase of this type. When your company is engaging a new vendor, it will likely conduct a financial assessment. After all, it doesn't want to turn on a tool on for hundreds or thousands of employees only to see the vendor go bankrupt and the tool become unusable. To that end, ask the vendor for proof of the number of paying customers. Ask for a list of customers and contact information for ones you can reach out to as references. If the vendor is a private company, it still must be willing to provide access to its financial records to give your company a degree of assurance about its financial health and viability.

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## CONFIRM SUPPORT BEFORE AND AFTER THE SALE

The final element to understand is the vendor's support framework. When you roll out the new tool, you want to make sure your team is never prevented from using the tool due to an intractable issue or is never down because of a problem. Your provider should at least commit contractually to a service level agreement (SLA) for uptime as well as to response times for different priorities of issues. Make sure the vendor provides both online and offline training so that your entire team has the support and information it needs to ramp up. Find out how often the vendor develops and disseminates new tools and how it will ensure your team can quickly get up to speed on these. Once you sign the contract, your team should be up and running quickly, so ask the vendor to commit to a timeline.

### CHECKLIST FOR SUCCESS

**As you evaluate your options, here's a checklist to keep at hand:**

- ▶ Ask the vendor to outline average and potential returns from using its software
- ▶ Determine how the vendor assists with adoption
- ▶ Find out if the vendor provides a free or reduced-cost trial
- ▶ Build strong relationships with your IT team to facilitate technology assessments
- ▶ Understand integration capabilities with systems of record
- ▶ Pinpoint how and when the tool updates your existing systems/tools
- ▶ Get a detailed list of the vendor's security and privacy controls
- ▶ Ask for proof of the vendor's security certification(s)
- ▶ Request financial details and customer references from the vendor
- ▶ Confirm the vendor commits to an SLA and provides end-user training
- ▶ Understand the vendor's support policies and software release cycles

**Ready to supercharge your sales team's productivity with a new tool for outreach? Ask us for a free trial.**