The Sales Enablement RFP Template

Presented by enablix

Instructions for use:

The following template should be used as a framework of needs and questions your organization might have when selecting a sales content management software. The general requirements are split into four sections:

- Sales
- Marketing
- Product Marketing
- Sales Enablement

Each section contains requirements and questions that pertain most to that functional group.

Each organization will value the functional requirements for each group differently, so you may find that your concerns most align with certain sections more than others. How you view the importance of each section should factor into how you 'score' the results from your RFP - we have left any scoring tally blank for that reason.

If you have any feedback on this template, or find that it's missing requirements important to you, Let us know!

Sales

The primary user base of any sales or content enablement software will be the sales staff, as they are tasked with accessing and sharing all content. The functional requirements for the sales team center around the ability to find and share content, and how to measure the content's impact on the sales cycle.

1. Content is only valuable when it can be shared.How is content shared from your system by sales staff? How is content accessed from outside sources? Do you support any whitelabeling of links?
2. Engagement allows sales to improve the buyer content experience. Can reps see engagement grouped by different data values, such as time, account, or persona? What are the ways in which reps can analyze past content engagement, and how does it help them improve the buyer experience?
3. Both sales staff and buyers need to access content via a mobile solution. Do you have a mobile app? How do users access the content library on-the-go?
4. Our team works in a variety of applications, and can't be expected to log into yet another system to find their content. How would reps find content in third-party applications, such as SalesLoft, or Outreach.io? Do you have any other integrations or extensions that would make it easier for sales staff to find content without leaving their platform of choice?
5. Collaboration between sales and marketing is key for almost all of our content. How is content and messaging collaboration handled within your application, and how do teams work with each other to produce assets?
6. Publishing content in a common library should require validation. What is the verification process like for rep-created content to be available in the common content library? Can reps add content?
7. Content recommendation is a key function for reps who may not always know the best content to send for each opportunity. Do you have any content recommendation capabilities? How do you recommend content, what platforms do you integrate with, and at a high level how does your "suggestion algorithm" operate?
8. Sales reps will need to leave feedback for the marketing team on key pieces of content. How does your system handle feedback from the sales team? Do you handle content-based conversations?

9. A single piece of content may be produced in many formats - for instance a case study may have a video, a web page, and a PDF. How do you account for different versions of the same asset, and how can sales reps be guided to the format that makes the most sense in each context?

10. Our sales team is constantly trying to create better buyer experiences. How do reps create deal rooms filled with relevant content? How do they design and style the page? Can those assets be secure?

11. Similarly, our marketing team is always updating existing assets to be more relevant for our buyers. How do sales reps get notified of changes to existing content? Does your application have a notification system?

12. Much of our content is account-specific and only applies for certain reps. How do members of the team contribute private content not discoverable by anyone else? How much content can be uploaded?

13. Our reps benefit from analytics of external engagement. How are reps notified of external engagement with content they have shared? What kind of insights and analytics does your platform support for external engagement?

14. Many of the documents available to the sales team are intended not to be shared outside of the organization. How does your platform account for 'internal-only' documents? What are the safeguards that prevent the sales team from sharing these documents publicly?

15. Our marketing team is constantly adding new content, and our sales team should be kept informed of new content. How does your application highlight relevant content for sales reps based on their sales and activity profile?

16. Sales reps will want to view their content and outreach hand-in-hand. In your application, how do sales reps define email templates, sequences and cadences used in outside applications and link relevant content in each?

17. Much of our content will have marketing-defined positioning statements to go along with it. How do reps access both content as well as relevant supporting messaging or templates in a single workflow?

18. Members of management on the sales team will want to use whatever enablement software we create to understand individual behavior.hat are the adoption metrics and analysis available within your application? How can leaders view individual and group usage rates to curb and promote behavior?

19. Our sales leadership needs a top-down view of content effectiveness as well as a bottoms-up method as well. How does sales leadership get a view of both which individual pieces as well as larger categories of content are effective? What high-level measures of efficacy or success does your app offer for management who are too busy to be in the app all day?
20. The sales team needs access to content to accelerate deals and power revenue growth. How do sales members access content within your platform? What are the search capabilities - are they free text, or is there a limited metadata structure? Can the sales team update this metadata?

Marketing

Often the key contributors to the platform, the marketing team must have a 360-degree view of everything in the platform. The functional requirements for marketing center around the ability for content marketers to provide content for sales reps, understanding how content is performing, and help shape the content strategy based on feedback from the sales team.

1. Content marketers should be able to add content to the library, and tag with any necessary metadata for end users to find. How do marketers add new content to your product, and what additional controls do they have around how end users access that content?
2. Marketers will need to know the engagement of anything they add to the library. How can they view and track external engagement on content, and compare content assets to evaluate their performance?
3. Sales may have feedback on the content that marketing uploads. How do members of the sales team leave feedback for content creators, and how can the two groups use the platform to iterate on content?
4. Marketing has the final say over what content is used by the sales team, but sales members need the ability to add and introduce content. How do marketers verify the quality of contributed content and approve assets that can be used/shared publicly?
5. Marketers tracking engagement need the ability to see all total external impressions, unique interactions, or filter interactions by account and stage. How does your platform allow marketers to specify engagement data?
6. Marketers should be able to find and share assets from a library for outbound marketing communications. Can assets be shared through outbound marketing tools (Hubspot, Pardot, etc.)?
7. Marketing leadership will need the ability, at a high level, to understand content utilization, and the overall "coverage" that marketing assets have among key personas and stages of the sales cycle. How will marketing view overall asset coverage and utilization in your platform?
8. Beyond just coverage, leadership will also need the ability to see what individual pieces of content as well as overall content groups are being utilized and found. How could marketing leadership create a content 'scorecard' in your platform, to see which content is getting engagement and which is not?

9. Marketing leadership will use this tool to justify investments in content marketing. How do you present the impact that content has on sales? How can a marketer see the ROI of their content strategy within your platform?

Product Marketing

Product marketing's involvement in the choice and usage of a sales enablement tool will vary by the organization and the role of PM within that environment. In many cases, Product marketing will act as the 'administrators' of the space and will be concerned with cross-functional alignment as well as the production and success of content.

1. While sales and marketing will be accessing and contributing content to the space, product marketing will be defining how assets are accessed and how they are identified. How does your platform support content tagging and what are the metadata values that product marketing can set?

2. Our sales and marketing content is hosted across a variety of different platforms - Sharepoint, Google Drive, our website, Youtube, etc. Which third party content platforms does your tool connect to, and how is that content found in your platform? Does the content need to be copied?

3. Uploaded content needs to be found in a variety of ways. How does a product marketer customize and organize content by:

    - Different stages of a buyer journey
    - Different stages of a predefined sales process
    - Level of prospect engagement

4. Describe the level of effort to upload content to your system, both in a one-time start as well as for ongoing use of the product. Do all of the assets found within your platform need to be copied, or can they link to other third parties?

5. While sales may be uploading documents, anything uploaded to the portal will need to be 'approved' by product marketing. Describe your approval process, and give examples of how different users may upload documents to the platform.

6. Content feedback is vital for the product marketing team. How will members of Product Marketing solicit and gain feedback on content from different groups?

7. Many of our sales assets are internal and confidential and should be able to be accessed from the platform, but should NOT be shared outside of the platform. How can admins mark certain materials as internal-only, and the methods by which you ensure those documents aren't shared outside the organization.

8. When certain new assets are put inside of the portal, product marketing will want to notify specific groups - but only for more important assets like pricing updates. How can admins notify groups of different users when content is added to the portal?

9. There will often be several versions of an asset, but end users should only have the ability to access the latest version. How does your platform handle versioning, both within your platform and within another storage system such as Sharepoint?

10. We organize much of our content by user groups (Sales, Marketing, Partners, etc.). How can content be designated for a specific group of users?

11. As administrators, product marketing should be able to control the initial view of the end users upon logging into the system. How does product marketing configure and update the home page for users? What about the home page is customizable?

12. Content that our reps and partners share should reflect our brand. Do you support whitelabeling of domains? How?

13. To make content discovery easier for our sales team, we organize specific sales playbooks and kits. How would a product marketer assemble a content-based sales playbook in your platform? How would we customize these playbooks to our sales cycle?

14. We make meaningful changes to our Go-To-Market process once every 1-2 years. How will we execute a content audit or make bulk updates to our content library within your platform?

15. As our product and brand mature, much of our content will cease to be relevant to our buyers. How do users 'retire' or archive content no longer relevant for enablement? Does this have to be a manual process?

16. Sales reps are often busy, so they will need to be armed with additional detail when sharing content. How do product marketers add additional context to a piece of content, such as internal descriptions, or external-facing summaries?

17. We may use details like how often reps are accessing or sharing content as metrics within our training curriculum. How would admins identify individual user engagement, and different ways that users are operating within the platform?

18. Our product marketers benefit from a holistic view of our content. Can your platform identify gaps in our content strategy? How would your tool give our product marketing team a better understanding of our content library?

Sales Enablement

Sales enablement is growing in popularity as enterprise sales become more complicated and content-driven. The SE team will be concerned with viewing and improving engagement, as well as using content for training and, perhaps obviously, enablement.

1. Does your platform support the ability for sales enablement to add enablement collateral (training, tips, guidebooks) to the central content library? How do reps access content from the enablement team? Are there dedicated search functions to find enablement content?
2. To increase efficiencies, custom sales playbooks would be created within the platform. How does the sales enablement team create custom sales playbooks? How can these assets be approved, or be given feedback from the sales team?
3. Sales enablement needs access to marketing content. How can the enablement team leverage marketing-produced content to create specific enablement-driven campaigns?
4. Enablement associates need to associate different pieces of content to different stages of the sales process. How does your tool customize to our sales process, and can enablement assign individual content pieces to sales stages?
5. The platform needs to integrate with Coaching and Learning Management Systems (LMS). Do you have specific pre-built integrations with any of these?
6. Sales Enablement managers will need the ability to create and define learning 'kits' and training videos in the content libraries. How are those created, and how does sales find them?
7. To improve content engagement, the enablement team will need complete access to all outside content engagement and few reporting by person and account. How does your platform allow for enablement managers to see platform-wide analytics?
8. In addition to seeing engagement analytics, sales enablement should have the ability to see content effectiveness in each stage of the sales cycle - how does your platform accommodate this?
9. Sales enablement needs the ability to attribute specific enablement exercises and content to closed-won deals. Can enablement associates attribute individual content assets to increases in revenue?