Evaluating your Sales Engagement Platform

A Sales Engagement Platform (SEP) is a single platform that optimizes every touch point throughout the customer journey to drive revenue-efficient growth and better outcomes for customers.

A true SEP is not just well-designed and easy to use -- it makes it easy to take the right actions at the right time, supports you across multiple communication channels, and scales up securely as your team grows.

So how do you look beyond the surface layer and know whether your SEP has robustly built capabilities that actually set your team up for success?

You can start with this checklist:

Your Sales Engagement Platform must have...	But watch out for...
Salesforce Sync	**A lack of conflict resolution.** When synchronizing two data sets, it's inevitable that there will be conflicts between the two. The same is true for Salesforce and your SEP. Therefore, it's essential that there's a mechanism to identify and resolve conflicts between those two data sets prior to syncing them.
Email sync	**Hidden security risks.** If any part of your email sync is supported by a 3rd party solution, your company data is only as secure as that 3rd party.
Integration with your Gmail or Outlook inbox	**A lack of follow up.** Sometimes, a SEP will boast an inbox integration but there's only bare bones functionality when you leave the platform and work from Gmail or Outlook. For instance, once a buyer replies to your email, can you leverage your SEP's follow-up functionality without leaving your inbox? Make sure your SEP enables you to work in the most convenient place without toggling between apps and browser tabs.
Calendaring	**3rd party solutions**. Using 3rd parties to provide core platform capabilities—like calendaring—makes the platform less secure, less reliable, and less supportable. Additionally, 3rd party calendar solutions like ChiliPiper or Calendly can add significant monthly costs per seat that aren't mentioned up front. **Functional limitations.** Some calendaring solutions look good on the surface but if you look beneath the covers you discover limitations that impact usability and integrity of reporting. Make sure your solution allows reps to assign meetings to an opportunity so you can track meeting impact on revenue. And make sure if a meeting is canceled or rescheduled that every system is updated so the meeting doesn't slip through the cracks. You want a full calendaring feature set, or you'll have to buy another tool. And isn't the point of a SEP to consolidate tools?

Outreach

Your Sales Engagement Platform must have...

But watch out for...

Your Sales Engagement Platform must have...	But watch out for...
Texting	**3rd party solutions and insufficient governance.** Texting that isn't natively built into the platform will cost you extra money (even if there's a "free trial" at first) and could pose risks to platform reliability or the security of your data. More importantly, they could lack the governance you need to stay compliant with spam laws. If your texts are sent through a third party solution, you'll have to go to another tool to access those messages.
Seamless Task Execution	**A one-size-fits-all task flow.** Your Sales Engagement Platform should work for every member of your team, not just one role or process. Ensure reps have a customizable global view of outstanding tasks with multiple options on how they sort and filter their tasks (ie sorting by task type, account, or priority). This will allow any member of your team to work in the way that's most productive to their role and workflow in one place, without using multiple disjointed tools.
Analytics	**Surface-level analytics.** Analytics are only as valuable as the insights they provide. Some solutions only let you view a high level report without the ability to click in and see the activity that drove those results and then take action. Another pitfall in some CEPs is the inability to see reports on how well your teams are progressing with certain prospects and accounts, or to segment and filter data to gain insights about a particular segment, channel or persona. The whole point of analytics is identify changes you can make to improve revenue growth and efficiency and if you can't manipulate the data to answer specific questions, you're operating in the dark.
Opportunity Engagement	**Opportunities without the ability to take action.** A list of opportunities only gets you so far without the ability to tie activities taken from your SEP back to those opportunities and actually work those opportunities from the platform. You need to see what needs to be done to close a deal, and then take action from that same place. The top questions to ask: "How can I work a prospect from the list of open Opportunities in my SEP?" and "When a rep edits an Opportunity, are validation rules respected when that update syncs back to Salesforce?"
Revenue Attribution	**Vanity metrics.** CEPs that don't attribute actions taken in their platform to revenue. CEPs that rely too heavily on some vanity metrics (like number of emails sent or calls made) won't help you figure out how much money you're making from the time you spend in their platform. And how can you measure the success of your investment if you don't know how much money it's making you? **Opportunity Attribution masquerading as Revenue Attribution.** It's one thing to know which sequence or action generated an opportunity. It's a whole other level to understand how a sequence or action led to winning that opportunity. Both are important, but you can't achieve revenue efficiency without true revenue attribution. Don't settle for less.
Machine Learning	**Lack of transparency.** You should ALWAYS understand why technology is guiding you to take a certain action and be able to test that guidance with hard data so you can feel confident you're making the right decisions. Make sure the insights your CEP's machine learning engine uncovers are actionable, not abstract, and can help you increase revenue or lower costs.
Account-Based Workflows	**Lack of flexibility to take an account-based approach.** Some tools overpromise and underdeliver when it comes to account based workflows — like providing an accounts page that lets you view accounts but doesn't allow you to take any action to work those accounts. Make sure your Account-Based engagement solutions are actionable.

Contact us to schedule a personalized demo today: **sales@outreach.io**