# Major Sales Automation Tools: What Do You Need?

**☑ smartsheet**

| | DO NOT NEED | MIGHT NEED | MUST HAVE |
|---|---|---|---|
| **Lead Generation** | | | |
| **Web scraping** – Extract contact information and other details such as title and location of prospects from websites. | ☐ | ☐ | ☐ |
| **Social research** – Tracks what potential buyers do on social media. | ☐ | ☐ | ☐ |
| **Lead list builders** – Define the characteristics of your ideal buyer and build a list of these prospects. | ☐ | ☐ | ☐ |
| **Email databases** – Though selling via email can feel somewhat ancient compared to social selling, email is still a key sales avenue. | ☐ | ☐ | ☐ |
| **Customer intelligence** – Find buyers who match criteria such as business problem, budget or headcount growth, recent activity, location. | ☐ | ☐ | ☐ |
| **Sales Enablement** | | | |
| **Data integration** – Integration tools collate data from multiple sources into a single interface. | ☐ | ☐ | ☐ |
| **Demo/conferencing** – Hold meetings and demonstrate your product via online video conferencing. | ☐ | ☐ | ☐ |
| **E-signature** – Electronic apps for legal signing of contracts. | ☐ | ☐ | ☐ |
| **Content creation and management** – Solutions can source content, schedule it, and distribute it. Tools can also organize and make all your sales collateral, from brochures to videos, easily accessible. | ☐ | ☐ | ☐ |
| **Marketing automation** – Run email campaigns, offer promotional pricing, and interact on social media. | ☐ | ☐ | ☐ |
| **Mobile interaction** – Stay in touch with buyers on mobile platforms with Instant messaging, texting, customer service chat. | ☐ | ☐ | ☐ |
| **SEO** – Search engine optimization helps you rank on Google, and tools offer keyword research, traffic volumes, and more. | ☐ | ☐ | ☐ |
| **Salesforce integrations** – There's a whole ecosystem of integrations built around this industry standard for CRM. | ☐ | ☐ | ☐ |
| **Business intelligence** – Access news, financial information, details on staff changes, and more to give you context and insight. | ☐ | ☐ | ☐ |
| **Sales forecasting** – Project revenue over the short-term future. | ☐ | ☐ | ☐ |

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## Customer Relationship-Building

| | DO NOT NEED | MIGHT NEED | MUST HAVE |
|---|:---:|:---:|:---:|
| **Social selling tools** - These applications do things like track keywords and conversations across social channels to help you spot who might need your product, analyze your personal interactions to see if one of your connections should be nurtured, and suggest relevant content. | ☐ | ☐ | ☐ |
| **Email management** – Software coordinates and helps to manage email communications. | ☐ | ☐ | ☐ |
| **Drip campaigns** – Send a series of persuasive personalized messages at planned intervals. | ☐ | ☐ | ☐ |
| **CRMs** – The heart of the customer relationship management system is a database of customers and all their relevant information. Many other features may be added. | ☐ | ☐ | ☐ |
| **Communications aids** – Write better emails and make better sales calls is a surefire way to boost sales output. There are tools for improving grammar as well as the aligning emotional context of your messages with your buyer's personality. | ☐ | ☐ | ☐ |

## Sales Development

| | DO NOT NEED | MIGHT NEED | MUST HAVE |
|---|:---:|:---:|:---:|
| **Sales development outsourcing** – Some companies choose to outsource the sales development process to freelance sales development representatives, or SDRs, who specialize in lead generation and moving prospects into the pipeline. | ☐ | ☐ | ☐ |
| **Sales training** – Improve sales staff skills with self-paced learning & other tools. | ☐ | ☐ | ☐ |
| **Data analytics** – Find patterns in sales that can be replicated or overlooked opportunities. | ☐ | ☐ | ☐ |

## Management

| | DO NOT NEED | MIGHT NEED | MUST HAVE |
|---|:---:|:---:|:---:|
| **Productivity** - Streamline communications and information sharing. | ☐ | ☐ | ☐ |
| **Prospecting workflow** – Keeping the sales pipeline running smoothly with planned cadence of contacts including calls, email, sharing of content & more. | ☐ | ☐ | ☐ |
| **Performance management** – These tools monitor how well sales reps are doing their job relative to their own goals and to others on the team. | ☐ | ☐ | ☐ |
| **Automation for sales team managers** – These solutions help train new hires, track performance at different levels, consolidate sales information, and generate reports and presentations to distribute this information. | ☐ | ☐ | ☐ |