# klyck.io

USER SPECIFICATION REQUIREMENT

FORWARD

Sales enablement software has shown proven results in B2B as it has grown in popularity over the past 5 years. Firms are seeing >70% reductions in sales prep time for meetings and over 20% increases in revenue from system implementation.

Although sales enablement is an effective tool for growth, not all systems are created equal. Our user specification outlines key product features and attributes that are tailored for complex B2B business such as industrial automation, life sciences, and measurement and control manufacturers.

The specification outlines key features that ensure that your selected system can help address common B2B challenges, examples of which are outlined below:

- Sellers customize sales assets for specific client interactions without adhering to appropriate brand messaging.
- No visibility to track top or poor performing sales assets.
- Knowledge sharing between sellers about effective uses and timing for specific assets
- Deliver Personalization at Scale
- Gain access to meaningful and actionable insight influenced by specific assets. (Currently, firms are more likely to track lower-value metrics — like downloads — rather than higher-impact metrics — like viewing times or closed deals)
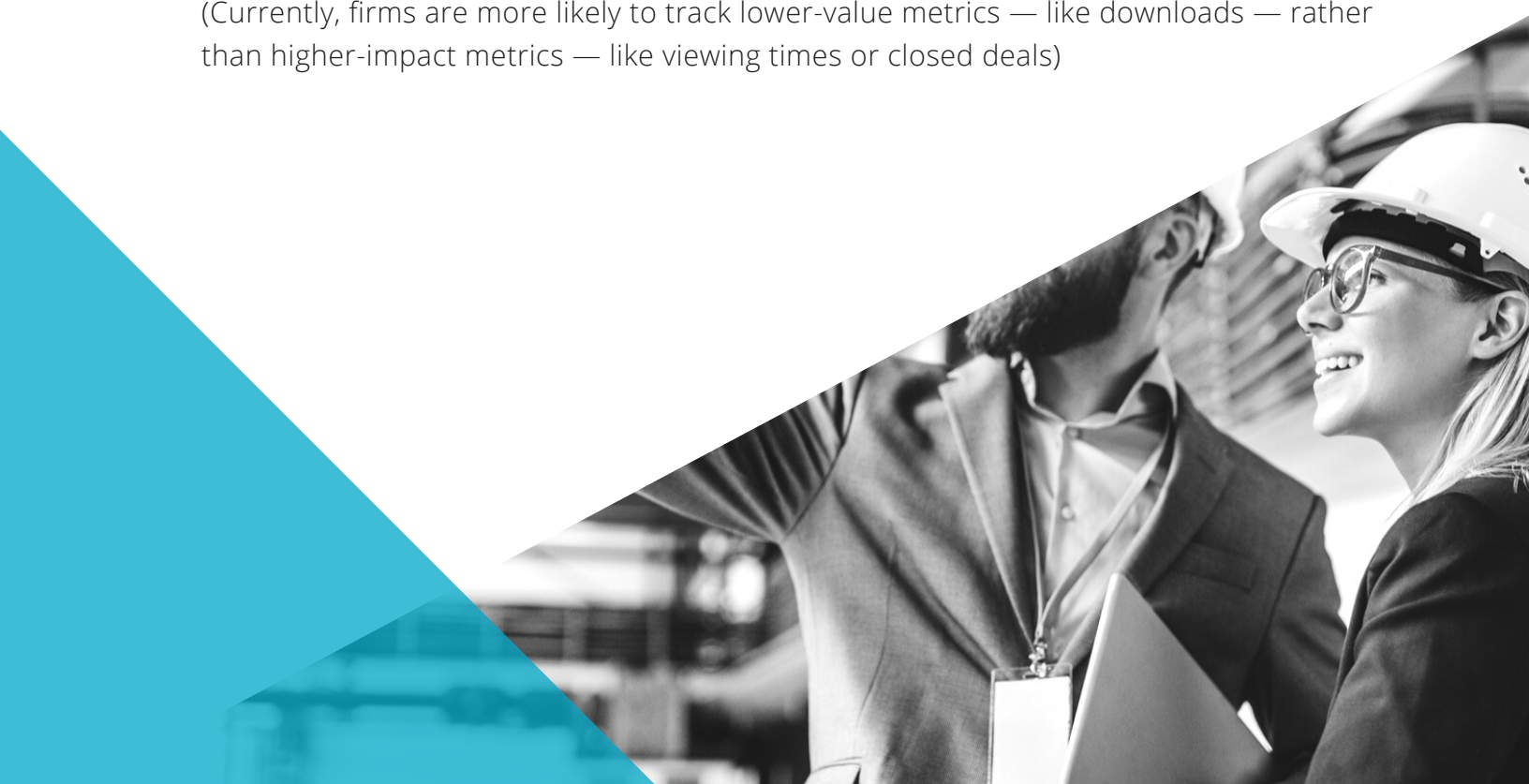
SPECIFICATION BY FUNCTION

Education

- Provide Conversation modules that provide curated content for users to prepare for prospect meetings, educate themselves on product features or system solutions, and review information on key solution differentiators
- Customized Conversation modules that align to the existing selling process - Examples Include Door Opener Conversations, Topic Conversations, Product Conversations, Subject Conversations
- Ability to access content and insights from sales coaches within the organization
- Ability to access buyer personas and content tailored / recommended for each persona
- Connectivity to LMS system to link existing training content and learning modules within the application
- Onboarding support - Centralized location for all on-boarding and training assets with step-by-step conversations to review

SPECIFICATION BY FUNCTION

Engagement

- Ability to recommend and deliver relevant content in each phase of sales process Content should be categorized by type (brochures, presentations, specification documents, etc.) and organized into a single content library
- Content library should not include any folders. It should be organized into single category levels and include intelligent filters, allowing sales users to quickly narrow down content
- Global search functionality that supports standard and exact match search queries. Must include elastic search technology and advanced attribute inputs
- Ability to filter and suggest buyer content with segmentation by industry, product, application, workplace, or any other customized criteria defined by user group
- Ability to report prospect engagement metrics on content shared via email. Reporting should include a visual timeline of content engagement, including the original copy and details of the email, the content that was shared, the number of times content was viewed, and the length of time content was viewed
- Macro reporting dashboard for all sales enablement metrics, both sales team usage and utilization as well as all customer engagements and interactions
- Ability to sync with BI systems
- Ability to report all sales enablement software metrics in Salesforce.com
- Ability to promote knowledge sharing between team members, share presentations, list top assets
- Deliver content for ABM accounts based on filter attributes and Conversation module customization

SPECIFICATION BY FUNCTION

Presentation

- Ability for the sales user to create and/or edit presentations within a single screen view and with no more than two clicks after selecting content from the available asset library.
- Ability for sales users to add their own content and uploads to a personal library in the platform
- Facilitate knowledge sharing between sellers about effective uses for content and sales assets
- Deliver personalized presentation suggestions at scale via Conversation groupings and auto recommendations via CRM
- Allow sales users to copy and modify master versions of content and store their own versions in a separate library (no edition of original controlled document)
- Provide a branded, interactive presentation mode inside the software. The presentation mode should be accessible to users with one click in Conversation modules and with one click within the presentation library.
- Presentation mode should deliver content separated into content category groupings for easy sales user navigation
- Provide the functionality to save presentations as favorites for easy, frequent sharing

SPECIFICATION BY FUNCTION

Integrations

- Integration with Microsoft Outlook email client
- Integration with Gmail email client
- Integration with Salesforce.com
- Integration with Microsoft Teams
- Integration with Microsoft Office 365 for content editing within application
- Ability to connect via API to DAM/PIM systems for content extraction and syncing

Content and Asset Sharing

- Assets can be shared via the users own mail client (i.e. MS Outlook or Gmail)
- Ability to share all available content file types in a single portal
- Ability for prospects and customers to provide rating for content viewed
- User interface for sharing should be available in all modules - content library, Conversation modules, and in presentation modes.
- Sharing content should require no more than two clicks after content has been selected from the available resources in the platform
- Conversation modules should provide provisions to deliver suggested content for sharing
- Sharing functionality should be available within Salesforce.com and powered by intelligent suggestions based on asset tags and filters within the platform

SPECIFICATION BY FUNCTION

Sales and Marketing Administration

- Provide a single curator interface to manage all content globally
- Allow for local content creators/managers to update, maintain, and route content at a regional level
- Provide functionality for content to be updated, replaced, or revised within the content library without losing data, links, shares, and other connections with prior versions. Updated versions should seamlessly replace prior content versions for any prospect with a link to previous version
- Report all interactions, shares, presentation usage, prospect view time, prospect opens, and other engagement metrics for each content asset in the platform
- Report all content ratings and qualitative feedback from sales users and from prospects
- Report all search queries entered by sales users within the platform
- Report all activities, logins, shares, meetings, presentations, and other usage metrics from each individual sales user
- Report all activities, views, opens, and other engagement metrics from each individual prospect by email address
- Provide reporting integration with Salesforce.com to correlate content performance with closed/won deals
- Allow for calculation of content ROI
- Provide CRM reporting data to allow for administrators to correlate cross-sell/upsell opportunities influenced by specific assets

SPECIFICATION BY FUNCTION

Analytics and Data Reporting

- Software should provide a visual timeline of customer engagement events for all content shared
- Provide real time notifications to users when a prospect has opened a shared email
- Report the total amount of time that content was viewed by prospect
- Report the total number of times that content was opened by a prospect
- Provide a summary of all content shared and insight per contact, account, lead or opportunity

Language and Global Support Features

- Functionality for static translations within the platform (app fields etc.)
- Ability to support dynamic translations (customer specific text such as filters)
- Ability for administrators to manage content routing and permissions for individual regions, business units, or sales user groups
- Software provider should have regional servers in place to support North America, Europe, Asia, and Mainland China

DATA BEHIND THE SPECIFICATION

DIGITALIZATION

77% of sales & marketing leaders say digital transformation has accelerated significantly since 2019
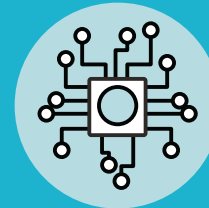
ENABLING SALES TEAMS

59% of companies that surpass revenue targets have defined sales enablement functions to support sales & marketing alignment

SALES & MARKETING ALIGNMENT

Businesses with strong sales and marketing alignment are **67%** more effective at closing deals, **58%** more effective at retaining customers, and drive **208%** more revenue as a result of their marketing efforts

CUSTOMER DATA GUIDING ENGAGEMENT

73% of top performing marketers are making shared use of CRM data with their sales teams to guide the customer journey