Sales Enablement Tool Evaluation *Checklist*

When assessing sales enablement software, consider these key criteria:

Ease of Integration

- [ ] Native integrations with your CRM, CMS, marketing automation tools and communication platforms
- [ ] API availability or support for integration platforms like Zapier
- [ ] SSO (Single Sign-On) compatibility for user access control

Robust Analytics & Reporting

- [ ] Real-time dashboards and customizable reports
- [ ] Tracking of key sales KPIs *(win rate, ramp time, content usage, etc.)*
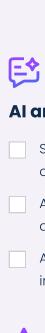- [ ] Predictive insights and coaching triggers based on rep behavior

Training & Onboarding Resources

- [ ] On-demand training modules or LMS integration
- [ ] In-platform tooltips and walkthroughs for ease of learning
- [ ] Customer success support or a dedicated onboarding manager

Sales + Marketing Alignment Features

- [ ] Role-based access *(e.g., content sharing between departments)*
- [ ] Version control and content approval workflows
- [ ] Shared visibility into lead engagement and content performance

AI and Automation Capabilities

- [ ] Smart content recommendations based on deal stage or persona
- [ ] Automated follow-ups, reminders and data entry
- [ ] AI-driven coaching or conversation intelligence *(e.g., Gong-style tools)*

User Experience (UX) & Adoption

- [ ] Intuitive, modern UI that sales reps will actually use
- [ ] Mobile accessibility for reps on the go
- [ ] Gamification or engagement features to drive participation

Pricing Transparency & ROI

- [ ] Clear pricing tiers with features by plan
- [ ] ROI calculators or case studies demonstrating performance lift
- [ ] Licensing flexibility *(by user, seat, team, etc.)*

Customization & Scalability

- [ ] Modular architecture or tiered features for growth
- [ ] Custom fields, pipelines or playbooks tailored to your sales process
- [ ] Localization and multi-language support for global teams

Security & Compliance

- [ ] GDPR, SOC 2 or ISO 27001 certifications
- [ ] Data encryption and access logging
- [ ] Role-based permissions and data segregation

Make Growth Easy With Sales Enablement

See How Kuno Can Help