

Sales Enablement Platform: Selection, Architecture, and Tradeoffs



- Point tools vs. one integrated revenue enablement platform



- 'Best vendor' questions mislead: context decides the answer



- Who joins: enablement, revenue ops, IT, procurement, legal, security



- Three lenses: selection criteria, architecture, tradeoff tolerances



- Good = documented decision that survives procurement, audit, and renewal

SELECTION CRITERIA

☐	_____
☐	_____
☐	_____
☐	_____
☐	_____

ARCHITECTURE



TRADEOFF TOLERANCES



WEIGHTED SCORECARD

ARCHITECTURE SKETCH



RISK REGISTER

Market Definition and Category Boundaries

- Gartner defines revenue enablement platforms by mandatory feature areas, not logos
- Digital content, guided selling, learning/coaching, buyer engagement, analytics, integration
- Forrester's Q1 2026 landscape evaluated 18 vendors at an inflection point
- Core jobs: content, readiness, buyer rooms, revenue analytics — few do all four
- Boundaries decide what a platform must natively provide versus integrate



Consolidation, M&A, and What It Means for Buyers

2025

2026



2025

Showpad and Bigtincan combined under Vector Capital in 2025.



December 3, 2025

Clari-Salesloft merged December 3, 2025; rebranded to Salesloft on September 1, 2026.



August 18, 2026

Seismic completed its Highspot merger on August 18, 2026 – roughly 2,500 customers, 3.5M users.



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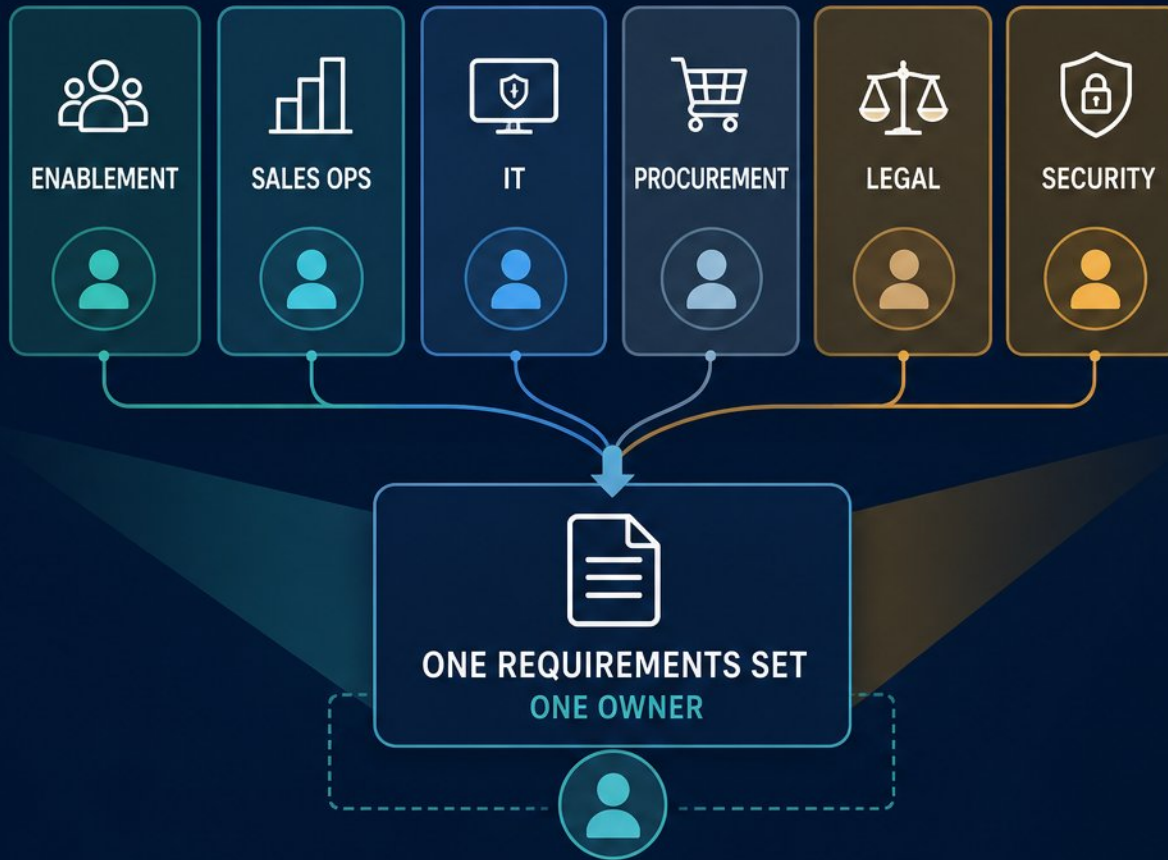


- ▶ – Rebrands ship fast; shared data models ship slowly – Clari Forecast kept its own brand.



- ▶ – Protect yourself: written integration commitments, module-level roadmap questions, post-merger exit clauses.

Requirements Definition and Stakeholder Alignment



- ✓ Translate outcomes into capabilities first: ramp time, content adoption, win rate, cycle length
- ✓ Separate functional, data, experience, and governance requirements; classify must-have vs. differentiator
- ✓ One requirements set, one owner — enablement, sales ops, IT, procurement, legal, security aligned
- ✓ Baseline IT/security asks: SSO/SCIM, SOC 2 Type II, GDPR/CCPA posture, data residency, retention
- ✓ Weighted scoring survives audit: defined weights, documented evidence, named scorers
- ✓ Guard against demo-driven bloat and modules you will never operate



WEIGHTED DECISION MATRIX

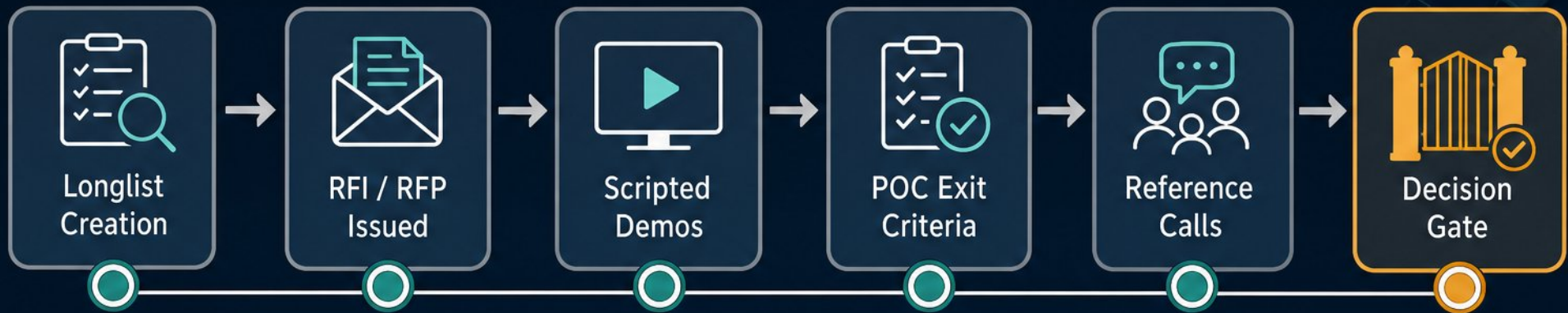
REQUIREMENT AREA

WEIGHT

EVIDENCE

SCORER

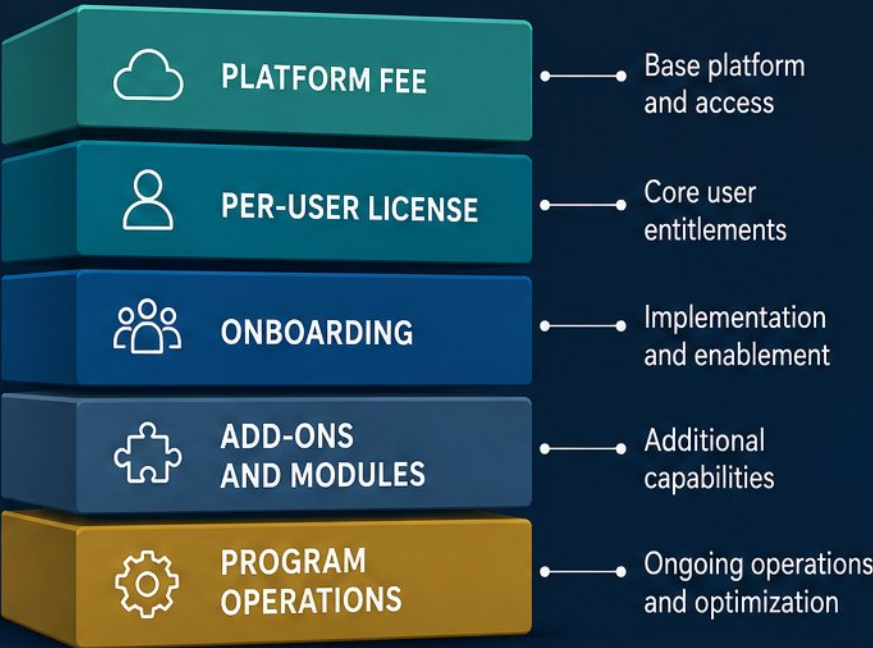
Selection Process: From Longlist to Decision



	▶ RFI/RFP with demo scripts built on your real deal scenarios
	▶ POC exit criteria defined before the trial begins
	▶ Ask: what % of customers use the module you care most about?
	▶ Reference calls: same use case, similar scale, last 12–18 months
	▶ 2026 pricing: platform fee + per-user + gated AI add-ons
	▶ Enterprise discounts typically 25–38% off list; top quartile 40–48%
	▶ Governance: who scores, who decides, how dissent is documented

Total Cost of Ownership and Contract Structure

TCO LAYER CAKE: WHAT DRIVES COST



YEAR 1 COST EXAMPLE

50-seat CI deployment:
~\$2,380/user Year 1
vs. ~\$1,500 advertised —
40–60% uplift



3-YEAR TCO EXAMPLE

1,200-user suite:
\$760K–\$960K annually;
3-year TCO \$3.3M–\$5.1M



Quoted per-seat rate isn't the price: platform fee, license, onboarding are separate



50-seat CI deployment: ~\$2,380/user Year 1 vs. ~\$1,500 advertised — 40–60% uplift



1,200-user suite: \$760K–\$960K annually; 3-year TCO \$3.3M–\$5.1M



License is 60–75% of TCO; implementation and program ops under-budgeted



Negotiate up front: 5–7% uplift caps, fixed mid-term add-on pricing, true-down rights

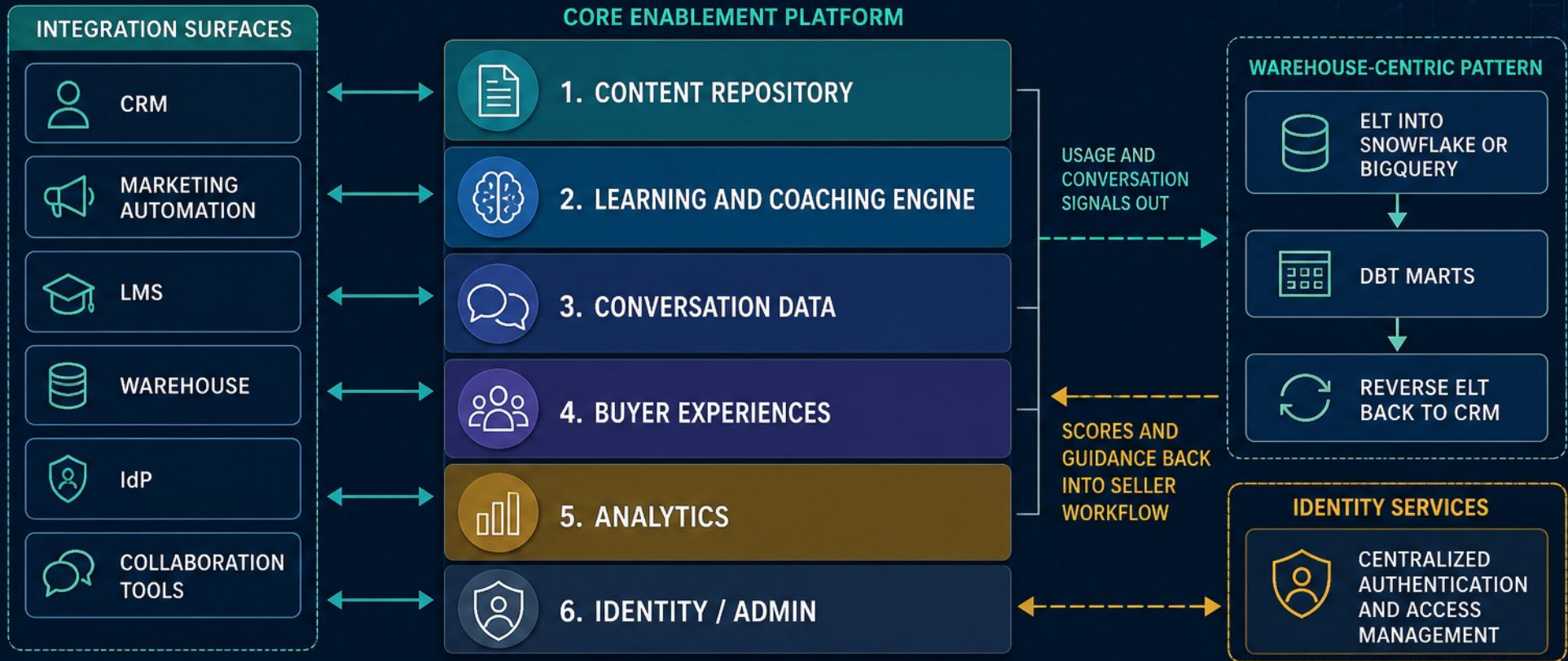


Stealth growth: module creep and edition refresh double run rate by year four

WEIGHTED DECISION MATRIX

EVALUATION CRITERIA	WEIGHT	OPTION A (SCORE)	OPTION B (SCORE)	OPTION C (SCORE)
Total Cost of Ownership				
Contract Flexibility				
Implementation Readiness				
Operational Impact				
Future Scalability				

Reference Architecture and Integration Patterns



- Core components: content repository, learning engine, conversation data, buyer experiences, analytics, identity



- Integration surfaces: CRM, marketing automation, LMS, warehouse, IdP, collaboration tools



- Bidirectional flows: usage and conversation signals out; scores and guidance back into seller workflow

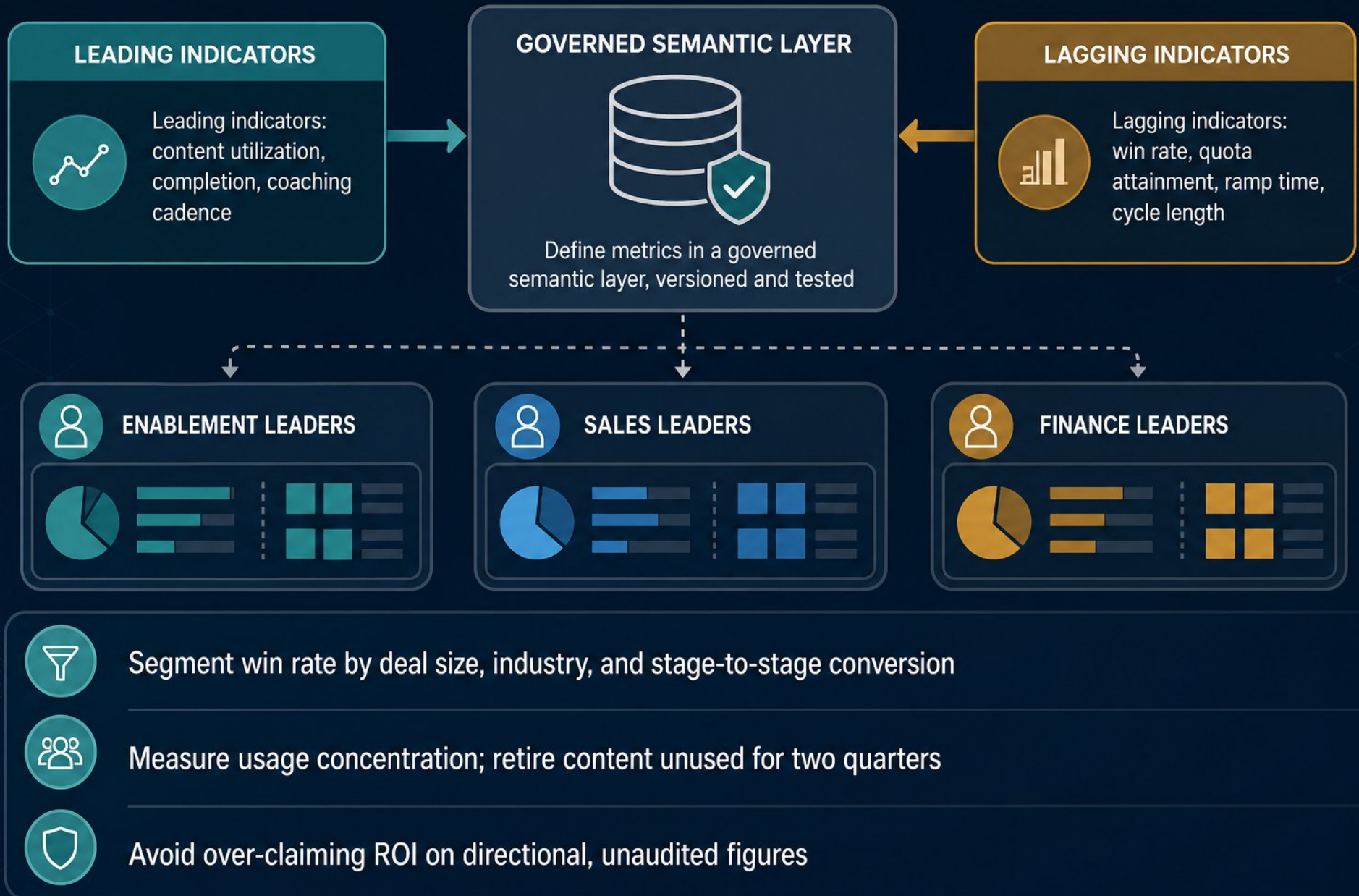


- Warehouse-centric pattern: ELT into Snowflake or BigQuery, dbt marts, reverse ETL back to CRM



- Zero-copy and federation cut duplication and lag, but require pipeline ownership and governance

Data, Analytics, and Measurement Model



AI Features, Automation, and Governance



- Core AI categories: content tagging, search, conversation analysis, role-play scoring, deal insight



- Where AI runs is a buying criterion — grounded retrieval vs. open generation



- The must-ask: does any model train on your data? Answer must be no, in the MSA



- Disclose AI interaction and enforce consent, opt-out at send time



- Contract exit: deletion SLA covering embeddings and backups, export, audit rights

APPROVED-CONTENT GROUNDING



Use grounded sources only

SUBPROCESSOR MAP



Know where AI runs

CONSENT PROPAGATION



Disclose and honor choices

AUDIT LOGGING



Record and review AI interactions

DELETION SLA CHECKPOINTS



Embeddings, backups, export, and audit rights

RISK REGISTER



RED FLAG
Model trains on your data



HIGH RISK
No consent or opt-out path



EXPOSURE
No deletion or audit rights

Architecture Tradeoffs: Suite, Best-of-Breed, and CRM-Native



	 Suite	 Best-of-Breed	 CRM-Native
 Benefits	• Suite: unified data model, one contract, faster time to value	• Best-of-breed: depth where you differentiate; easier to swap one tool	• CRM-native: guidance embedded in the CRM drives materially higher adoption
 Hidden Costs	• Hidden costs: migration, integration upkeep, duplicated models, data gravity lock-in	• Hidden costs: migration, integration upkeep, duplicated models, data gravity lock-in	• Hidden costs: migration, integration upkeep, duplicated models, data gravity lock-in
 Scale Fit Heuristic	• By scale: under \$50M ARR consolidate	• By scale: mid-market hub + specialists	• By scale: enterprise best-of-breed



Decision rule: consolidate commodities, specialize where depth drives revenue

Build vs. Buy vs. Extend



- Platform wins on speed: working deployment in 30–90 days



- Internal build wins only for genuinely differentiated, regulated workflows



- Honest build cost: 2–4x platform over three years



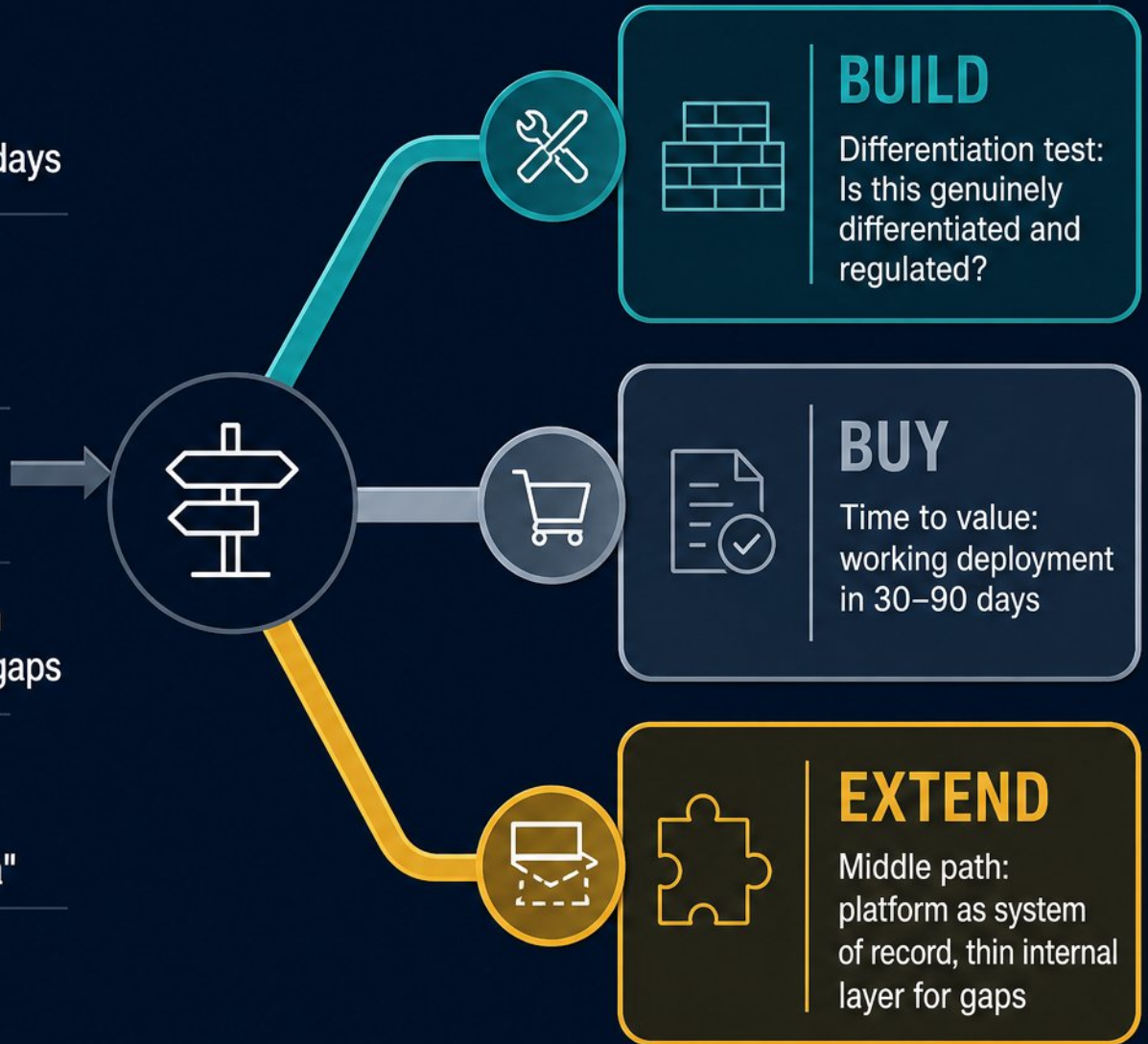
- Middle path: platform as system of record, thin internal layer for gaps



- Failure modes: over-customization and the unmaintained "permanent beta"



- Services quote above 50% of license signals workflow off design center

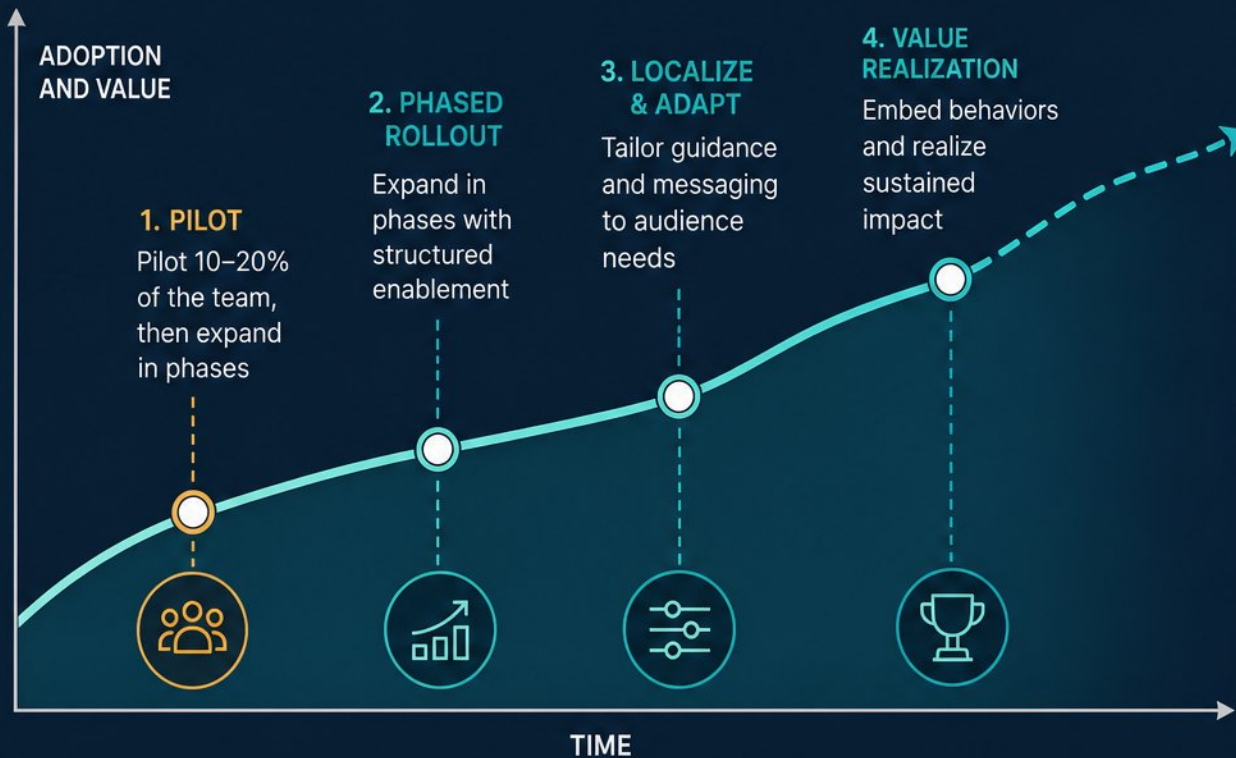


Change Management, Adoption, and Value Realization



JOURNEY TO ADOPTION & VALUE REALIZATION

A phased approach with intervention points and evidence milestones



MILESTONE CHECKPOINTS



Early Validation

Is the pilot working?



Adoption Lift

Is adoption increasing?



Behavior Change

Are behaviors shifting?



Value Realization

Is value materializing?



KEY GUIDANCE & EVIDENCE

- 89% of teams have a process; only 36% of reps follow it
- Guidance inside the CRM hits quota at 49% vs 15% in docs
- Above 6 reps per manager, adherence drops by half
- Pilot 10–20% of the team, then expand in phases
- Watch flat logins, thin content usage, low training completion
- Expect ramp-time signal in 90 days; win-rate evidence after two cycles



EARLY WARNING SIGNALS



Flat logins



Thin content usage



Low training completion



High Risk

Medium Risk

Low Risk



Risk Register for Enablement Platform Decisions



RISK CATEGORY	RISK DESCRIPTION	SEVERITY	LIKELIHOOD	OWNER	MITIGATION PATTERN
 Vendor risk	- Vendor risk: post-merger roadmap shifts, module rationalization, and PE ownership changes				 - Mitigation: contract protections, written integration commitments, quarterly usage audits and retirement
 Commercial risk	- Commercial risk: uncapped uplifts, add-on creep, and discount erosion without competitive pressure				 - Mitigation: contract protections, written integration commitments, quarterly usage audits and retirement
 Data and AI risk	- Data and AI risk: model training on conversations, residency gaps, incomplete deletion at exit				 - Mitigation: contract protections, written integration commitments, quarterly usage audits and retirement
 Adoption risk	- Adoption risk: shelfware modules, no named governance owner, launch treated as a task				 - Mitigation: contract protections, written integration commitments, quarterly usage audits and retirement
 Integration risk	- Integration risk: brittle integrations, undocumented interfaces, and upgrade fragility				 - Mitigation: contract protections, written integration commitments, quarterly usage audits and retirement

Decision Framework and 90-Day Action Plan



- **Framework:** selection criteria, architecture fit, stated tradeoff tolerances



- **Business case** finance accepts: costs by line, assumptions, adoption sensitivity



- **Produce:** weighted scorecard, reference architecture sketch, risk register

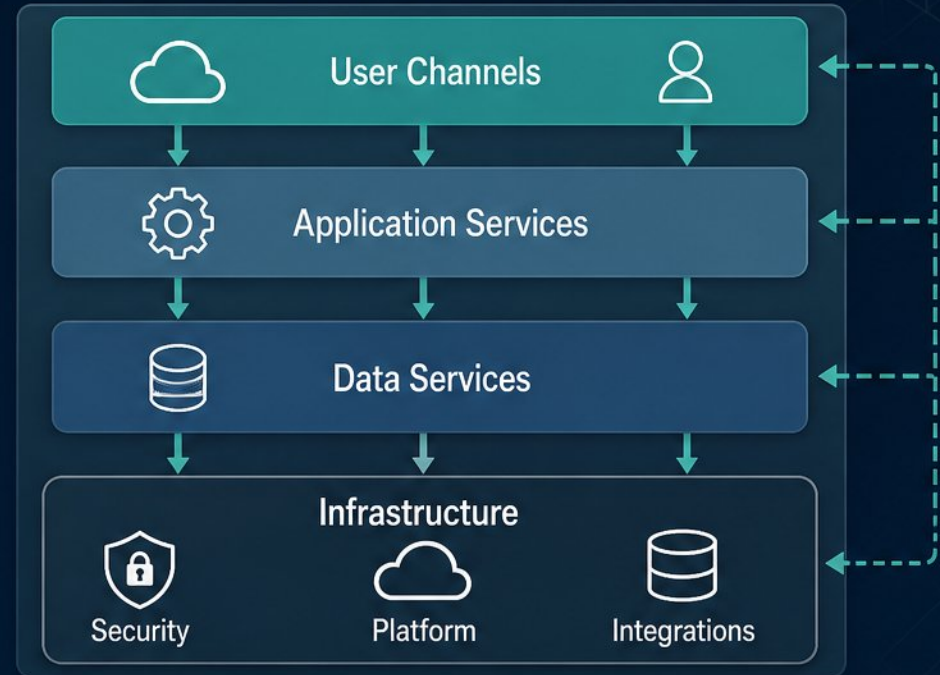


- **Checkpoints:** requirements sign-off, shortlist, POC exit, security, award



- **Days 1–30** requirements, **31–60** RFP, **61–90** POC and negotiation

REFERENCE ARCHITECTURE (SKETCH)



CHECKPOINTS



Requirements sign-off



Shortlist



POC Exit



Security



Award



Days 1–30
requirements



31–60
RFP



61–90
POC and negotiation



- **Sequence first:** fix process, prune content, embed guidance in CRM

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