

Marketing Tools

What pieces of technology do you use for your marketing and lead generation. Is it easy to use, connected to other tech and enable data driven decision making?

Website technology – CMS and Hosting?

Blogging Tools?

Marketing Campaign Management software?

Marketing Automation tools?

Landing Page Software?

Chat Bot / Live Chat?

Email Marketing Software?

Social Media Management Software?

How much are you spending on Marketing tools per year?

Sales Tools

What software are you using to track sales and your pipeline?

Sales Pipeline Software?

Meetings tools?

Task management tools?

Sales playbooks tools?

Quoting tools?

Sales automation tools?

Account-based sales tools?

How much are you spending on sales tools per year?

Data Management

What technology are you using to manage and record client, company data and touch points?

What Customer Relationship Management (CRM) software are you using?

Is it easy to use?

Is it connected?

Does it measure and record every touch point?

How much does it cost you per year?

Other software, apps and technology in your tech stack

Now you have listed the main pieces of software you use in your system, think through other tools, apps and software in your business.

Operational Delivery

Do you use any specific software for delivery of your product, service or solution i.e ERP or WMS software?

Service & Support Tools

Survey software?
Support Tickets software?
Knowledgebase?
Customer portal?

Finance Technology

What accounting software do you use? i.e Xero / Sage

Payment tools? i.e Stripe / Paypal

Data Analysis Tech

Do you use website analytics?

Reporting & Dashboards

What tools do you use for reporting?

Do you use any dashboard software?