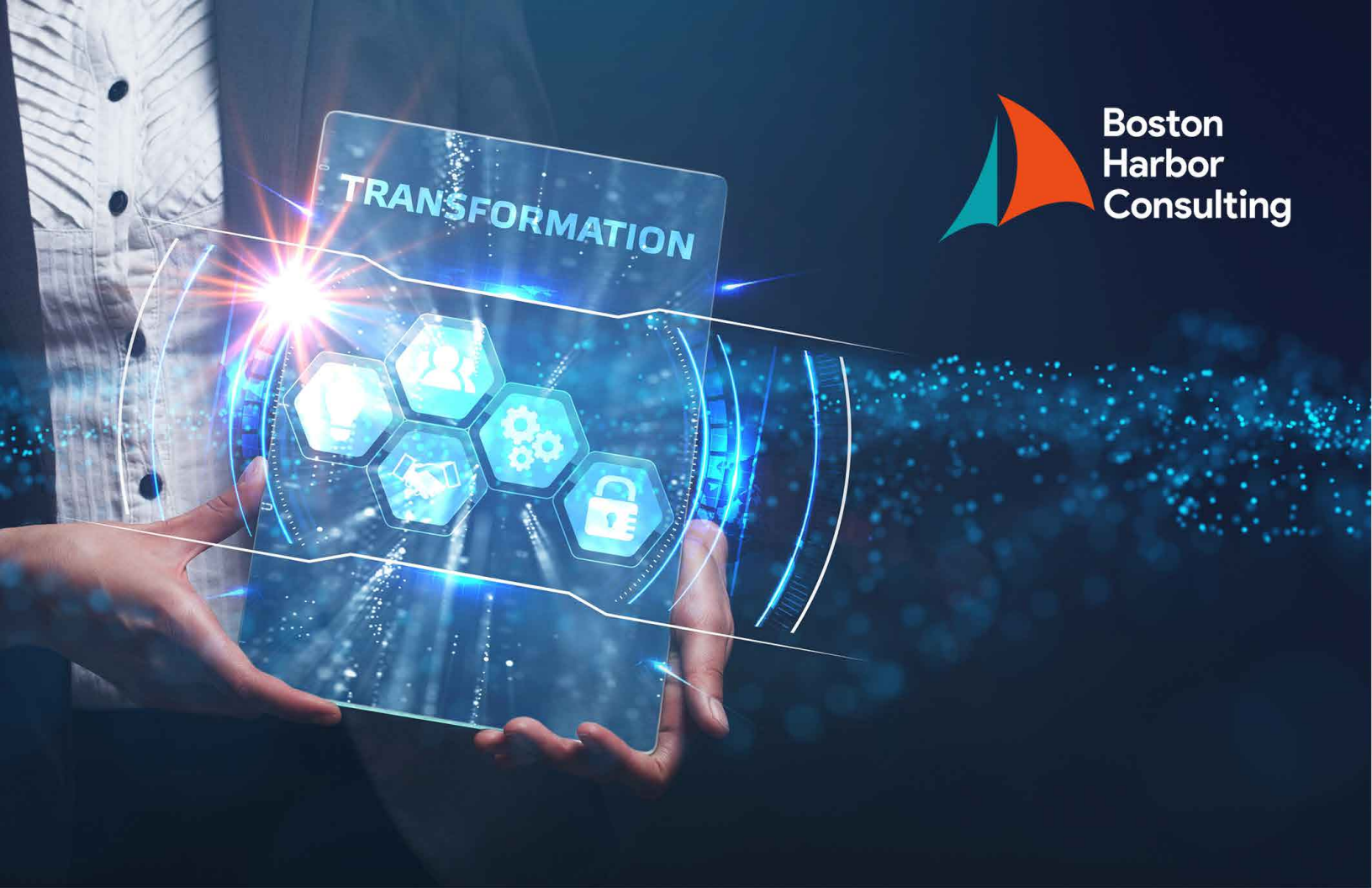




Software Selection

RAPID ASSESSMENT

Choose the Best Revenue Operations Solutions
for Your Business.



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Introduction

WHY CHOOSE OUR SOFTWARE SELECTION RAPID ASSESSMENT?

Fewer than one-third of digital transformation initiatives achieve their objectives to enhance and maintain operational performance and capabilities. Recent studies from McKinsey & Company and Gartner echo a common sentiment: digital transformation projects are hard, with Revenue Operations (RevOps) transformations proving even more so. Despite these challenges, upgrading legacy systems to provide new capabilities is consistently ranked as one of the highest priorities for sales operations teams to support growth and emerging market demands.

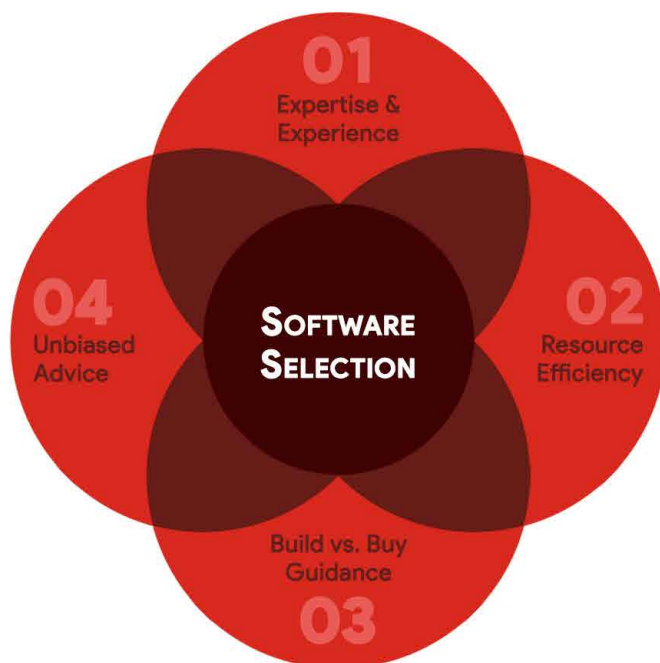
The RevOps process is inherently complex, encompassing many interwoven steps and systems. Changes in one method or function can cause downstream ripple effects, demanding careful attention at each stage. Compounding this challenge is integration with legacy systems, including their unique customizations requiring skill and precision. Moreover, a burgeoning market of RevOps vendors makes choosing the right one for your project challenging. Achieving success isn't about simply making a choice—it's about alignment. Alignment with your company's future goals and commitment to exceptional customer experience underpins the selection process. Achieving success also requires agility. Flat organizational structures with accelerated decision-making characterize technology startups. Startups must ensure that bureaucratic delays don't bog down ideas and solutions but are rapidly iterated. Moreover, startups emphasize quick solution prototyping and an embrace of change, enabling teams to test, refine, and deploy effective solutions in a shorter timeframe. Our firm culture and approach to service delivery embraces these principles to help ensure agility, innovation, and success in your RevOps initiative.

This whitepaper presents our firm's *Software Selection Rapid Assessment* service, a comprehensive approach designed to optimize the selection process for enterprise RevOps solutions. Our approach looks beyond vendor marketing to determine the strategic fit for your organization. We address the challenges inherent in the selection process, from managing internal politics and brand biases to the often-debated "build versus buy" dilemma. This whitepaper details our approach, its underlying principles, and how we facilitate a more informed selection process. We invite you to continue reading and discover how our *Software Selection Rapid Assessment* can help guide your organization's selection process.



What's Included

KEY BENEFITS OF OUR ASSESSMENT



ASSESSMENT DELIVERABLE



ASSESSMENT TASKS AND TIMELINE

	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8
Project Kickoff	★							
Requirements Workshops								
Vendor Presentations								
Fit and Alignment Scoring								
Readout Preparation								
Project Readout								●

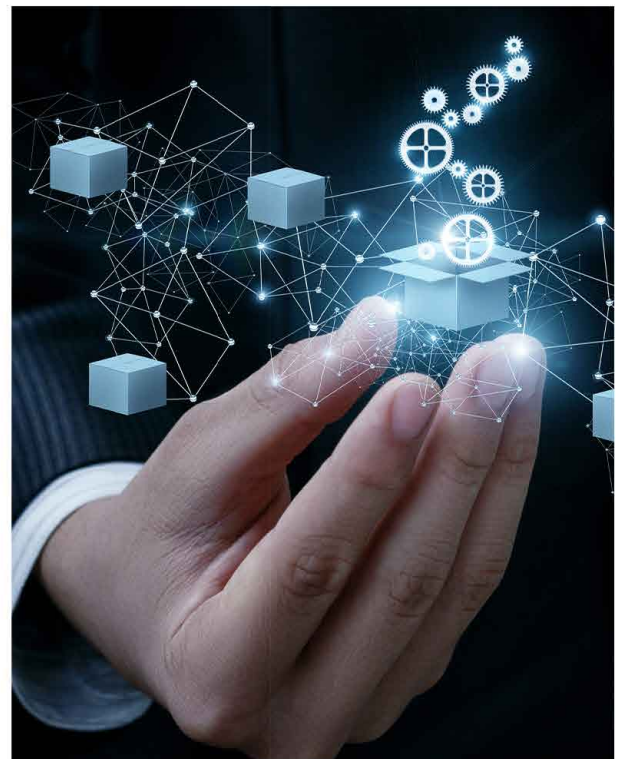
Expertise & Experience

LEVERAGING EXPERIENCE: GAIN NEW INSIGHTS FROM DOMAIN EXPERTISE

When engaging our firm to assist with your software selection, you expect an experience that transcends the capabilities of an internally managed process. Experience is not merely a measure of time but the accumulation of insight from doing the same thing many times over in different ways. With each project we have undertaken, our firm has expanded our perspective, deepened our understanding, and improved our implementation of RevOps solutions. Our domain experience translates into a streamlined selection process informed by past challenges and successes. It means avoiding pitfalls, anticipating obstacles, and accessing proven strategies to make the best decisions for you.

Our experience has equipped us with insights into the real-world capabilities of vendor offerings, uncovering nuances in functionality and performance that often remain cloaked in product demos and vendor pitches. Many innovative vendor offerings have been introduced over the last few years, and significant investment in these products, particularly related to AI, is leading to a rapid evolution of RevOps solutions. While most internal teams might be acquainted with a handful of products, our vantage point extends across a broader spectrum of solutions, considering even emerging or niche capabilities that could be a strategic fit for your business.

Additionally, we follow a structured methodology to guide the selection process. We begin with a series of immersive workshops to better understand your goals for the solution. While the *Software Selection Rapid Assessment* does not include the preparation of a comprehensive project Vision and Scope document, it will help prioritize your key objectives that we'll use during the evaluation. Finally, our approach consists of a scoring system to evaluate the fit and alignment of vendor offerings to your needs using ten critical areas of consideration for formulaic assessment.



Resource Efficiency

02

STAYING FOCUSED: AUGMENT INTERNAL TEAMS FOR MAXIMUM PRODUCTIVITY

The software selection process often requires diverting key personnel from their core responsibilities. Making the right decisions requires research, which can demand considerable time to evaluate vendor offerings and align their capabilities with your organizational needs. Diverting time to the selection process can disrupt regular operations as essential resources may need to reduce time on other critical internal priorities. Engaging with us allows you to preserve your organization's internal momentum. Your team remains undistracted, their focus undiluted, channeling their energies where they matter most while we do the legwork for you.

When engaging with our firm, you will benefit from our established relationships with many leading RevOps vendors, thereby streamlining the process of arranging demonstrations and Q&A sessions. In some cases, we have direct channels to vendor engineering and product management teams to facilitate your direct communication with the most authoritative vendor voices. Additionally, our prior RevOps engagements grant us insights into product pricing and available discount options, potentially providing your team with more favorable negotiating terms. By leveraging our experience and relationships, your internal team can focus on evaluating the best fit for your needs without spending unnecessary time on tactical steps.

Beyond our established vendor relationships, our firm offers a structured framework encompassing ten critical evaluation criteria for formulaic scoring. Our experience with vendor offerings gives us insights into their strengths and weaknesses vis-à-vis these criteria. Considering your project's priorities, we can offer perspective on how each vendor's capabilities might align with your goals. Leveraging this knowledge, we simplify the evaluation process with a systematic scorecard that reflects the consolidated results of all stakeholders.



Build vs. Buy Guidance

03

GAINING PERSPECTIVE: UNDERSTAND THE UNIQUENESS OF YOUR REQUIREMENTS

When considering a RevOps solution, the "build versus buy" decision is typically at the forefront of strategic discussions, and the decision is not always black and white. While it may be tempting to immediately eschew the notion of developing a tailored solution, it's important to contrast your project requirements with the best-fit vendor offering and estimate the customization required to achieve acceptable alignment. Depending on your needs, a balanced approach might involve leveraging a leading vendor solution to its fullest and developing a tailored "side-car" application to bridge the gaps. This hybrid strategy can mitigate the risk of over-customizing vendor offerings while continuing to deliver the necessary capabilities.

Understanding the long-term vision of your sales operation processes and requirements is essential in the "build versus buy decision." Are there unique attributes of your product offerings, configuration processes, or discounting and pricing, for example? Are these attributes merely outliers that can be adapted to vendor functionality, or do they serve as strategic differentiators that bolster competitive positioning? If they underpin competitiveness, custom development may be warranted. Furthermore, cost and time to market are critical considerations. The total cost of ownership encompasses the immediate expenditure on licensing fees and the longer-term financial implications of any necessary customizations. Setting realistic expectations on total cost ensures alignment with budgetary constraints and anticipated ROI. And regarding customization, it's essential to consider the urgency of your organization's needs. While perfect alignment with your current operations will facilitate end-user satisfaction, this alignment may require customizations that extend the project's duration.

As part of our assessment, we help navigate the multi-faceted "build versus buy" decision to design an approach that suits your organization best.





Unbiased Advice

REMAINING IMPARTIAL: BENEFIT FROM OUR VENDOR NEUTRALITY FOR ALIGNMENT

The potential for bias in decision-making often complicates an objective appraisal—our dedication to delivering unbiased advice hinges on effectively understanding and navigating these biases. When faced with the nuances of internal politics, organizations can unintentionally skew decisions to favor influential stakeholders at the expense of the broader needs of the sales operations unit. Maintaining an objective stance, we help prioritize recommendations catering to the organization's collective requirements and the overarching enterprise objectives.

Then, there's the lure of familiarity. Both vendor familiarity and brand bias can tempt decision-makers to gravitate towards software they've previously encountered or brands that resonate strongly in the market. While experience and a strong market reputation are valuable, they should not be the deciding factors. Every enterprise's needs evolve, and what worked previously might not be ideal now. Our methodology involves objectively reviewing each solution gauging its strengths and weaknesses relative to your present requirements rather than relying on past associations or brand strengths.

Furthermore, the dazzle of the latest features or the attraction to recently gained information can easily divert attention from what is fundamentally important. While innovation is commendable, it's essential to discern between innovation that aligns with your needs versus innovation for its own sake. We will assess the relevance and utility of new technology, ensuring it aligns with your operational needs and is not just the "latest and greatest" without substantial value.

In short, from the outset to our final recommendations, we will explore each vendor offering and highlight areas that may get overshadowed by biases to ensure our advice is grounded in your enterprise's reality and help you make the right decision.



Recommendations & Next Steps

WHAT YOU WILL RECEIVE AFTER THE ASSESSMENT



After our *Software Selection Rapid Assessment* engagement, we will provide you with our *Revenue Operations Software and Technology Recommendations* report. The document will summarize our findings with recommendations tailored to your enterprise's unique objectives. We will provide the vendor scorecard results and an evaluation of options detailing their alignment with your unique business processes. Additionally, the report will include a prioritized roadmap of suggested next steps and potential pitfalls or challenges to be aware of. Our objective is to equip you with a holistic, actionable blueprint that informs and empowers your team to move forward with clarity and confidence with your implementation initiative.

CONTACT US, AND TAKE THE NEXT STEP IN YOUR REVENUE OPERATIONS JOURNEY

Navigating Revenue Operations software selection is no small feat. Throughout my tenure, I've witnessed many implementation challenges and understand the significance of making the right software decision. But beyond the spreadsheets and systems, what truly resonates with me is the people: passionate professionals who are unwavering in their quest for excellence. If you are seeking a partner in this journey—a firm that values precision and personal touch—please consider reaching out at services@bostonharborconsulting.com. My team and I are here to listen, understand, and co-create a brilliant solution for you. Let's embark on this journey together and make the story of your organization's transformation one of enduring success.



Shalane Sheppard
Vice President, Services

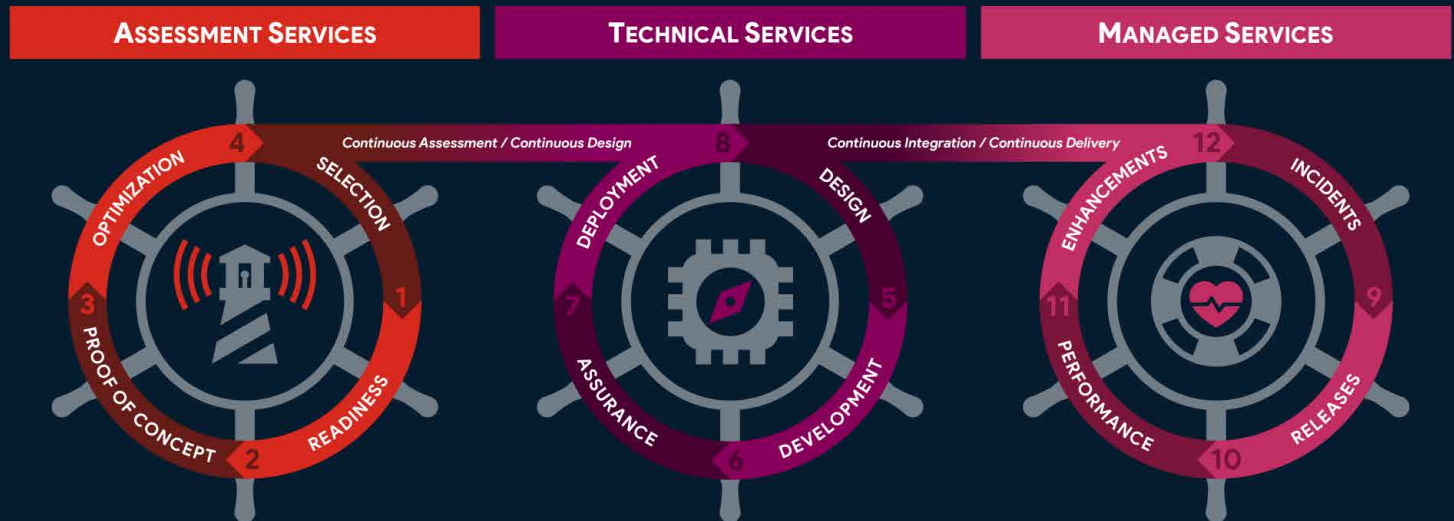
About Us



UNLOCKING SUCCESS IN REVENUE OPERATIONS: A JOURNEY WITH BOSTON HARBOR CONSULTING

With a rich history and a dedication to excellence, we have evolved into a trusted partner for organizations seeking transformative solutions in the Revenue Operations domain. Our story begins with a simple vision: to bridge the gap between business objectives and technical realities. In the dynamic landscape of Revenue Operations, where efficiency, and precision are paramount, we recognized the need for a partner who could seamlessly integrate technology and strategy. This realization fueled the inception of Boston Harbor Consulting, and our commitment to this vision has guided us ever since.

OUR COMPREHENSIVE SERVICE PORTFOLIO



OUR GUIDING PRINCIPLES: EXPERTISE AND INNOVATION

With over a decade of domain expertise in Revenue Operations solutions across various sectors and geographic regions, we know that true excellence lies in understanding the unique challenges and opportunities that each client brings to the table. Innovation is our driving force. We believe in the power of creative problem-solving and continually seek out innovative approaches to tackle complex challenges. Our specialization in SAP technology and low-code innovation ensures that we stay at the forefront of enterprise development. Innovation isn't just a buzzword for us; it's embedded in our DNA.

THE BOSTON HARBOR CONSULTING DIFFERENCE

Our distinction lies not only in what we do but in how we do it. We're not just a consulting firm; we're your partner in success. Our commitment to long-term growth, adaptable solutions, and unwavering support sets us apart. As you navigate the complexities of Revenue Operations, choose Boston Harbor Consulting as your compass. Together, we'll embark on a journey of transformation, unlocking new horizons for your organization. Join us in shaping the future of Revenue Operations. Welcome to Boston Harbor Consulting.

