

THE PRESALES TOOL KIT

Selection & Internal Buy-In Checklist

Selecting the right technology for your presales organization isn't just about features—it's about finding tools that solve real problems, integrate seamlessly into your workflow, and deliver measurable value. With AI hype and endless sales tech options, it's easy to chase shiny objects rather than focus on what truly moves the needle. This checklist will guide you through evaluation to building a compelling business case that wins internal support.

Define the Problem

- ☐ **Document specific pain points:** What manual processes are slowing you down?
- ☐ **Scope the size of the problem:** Hours lost? Deals stalled? Revenue at risk?
- ☐ **Set measurable goals:** What does success look like? (e.g., reduce demo prep by 50%)
- ☐ **Quantify the impact:** Build a process for measuring the impact for the project
- ☐ **Understand the scalability:** How many people and teams are impacted by this process on a recurring basis, and how often does the pain repeat?

Evaluate Options

- ☐ **Integration check:** Does this tool work with your CRM and existing tools?
- ☐ **Security & compliance:** Are SOC 2, GDPR, data residency requirements met?
- ☐ **Run a real pilot:** Test with actual customer scenarios, not just vendor demos, so you can see how the solution provides value to your organization
- ☐ **Get end-user feedback:** Will your team actually use this daily?
- ☐ **Check vendor stability:** Talk to 2-3 customer references similar to your org or check G2 & Gartner reviews
- ☐ **Assess the implementation path:** What does onboarding actually look like day-to-day, what support is provided during rollout, and how easy is it for your team to adopt the tool successfully?
- ☐ **Assess roadmap and future fit:** Does the vendor have a clear, credible product roadmap, and will the tool continue evolving to support your organization over the next 12–24 months?

AI Tool Red Flags

🚩 **Vendor can't explain how their AI works**

Black box = danger

🚩 **No clear data usage policy**

Is your data training their models?

🚩 **"Too good to be true" claims**

100% accuracy promises

🚩 **Can't test for hallucinations or accuracy in pilot**

Implementation risk

Build Your Business Case

- ❑ **Calculate ROI:** Time saved × hourly rate + impact on deal velocity
- ❑ **Total cost:** Include implementation, training, maintenance
- ❑ **Identify stakeholders:** Who approves? (Finance, IT, Sales Leadership)
- ❑ **Tailor messaging:** CFO wants ROI, IT wants security, Sales wants results
- ❑ **Create 1-page executive summary:** Problem → Solution → Investment → Return

Champion the Change

- ❑ **Anticipate objections:** Have data-backed responses ready
- ❑ **Show competitive advantage:** What are competitors using and how will this give you an edge?
- ❑ **Procurement:** Work with your team to negotiate and finalize contract
- ❑ **Build a transition plan:** Replacing an existing software? Define the transition plan and talk to your new vendor about where they can automate some of this work
- ❑ **Start with enthusiasts:** Launch with early adopters within your org first
- ❑ **Communicate quick wins:** Share success stories internally to build momentum
- ❑ **Track & report results:** Build quarterly ROI updates to leadership; work with your vendor to pull metrics in a dashboard if available

AI Horror Stories to Avoid

- ⚠ **Hallucination disasters:** AI generating fake specs or testimonials in live demos
- ⚠ **Over-automation backfire:** Robotic responses damaging relationships
- ⚠ **Data leakage:** Customer info exposed through AI training data
- ⚠ **Compliance violations:** AI tools breaking GDPR or industry regulations

Quick Decision Framework

Green Light

Clear problem, positive pilot, strong ROI, enthusiastic champions

Yellow Light

Emerging vendor, complex integrations, optimistic assumptions

Red Light

No problem fit, negative feedback, unresolved security issues

Remember: The best tool is the one that gets used, protects sensitive data, and delivers value quickly.