TOOLS

A 90-Day Implementation Guide to Help You
Build Your Custom Tool Stack

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OVERVIEW

Streamline the communication of your positioning and the automation of your processes with a custom tool stack.

To establish Strategic Alignment, you need to focus on positioning, process, tools, and metrics. This 90-day guide is centered on tools and has been created to help you roll out your revised strategy.

Implementing the positioning and end-to-end engagement process of your company is no easy task. By building a custom marketing and sales tool stack, you have the opportunity to streamline the communication of your positioning and the automation of your processes.

There are three keys that help you build your custom tool stack:

Key 1 – Resource Analysis
Key 2 – Automation Opportunities
Key 3 – Stack Connectivity

With these keys, you will be equipped to build a stack that works best for your organization and its marketing and sales needs.

Start applying this teaching at the organizational level. Once you've gone through the material at that level, then you can revisit it and apply it to specific campaigns, product launches, or other related marketing and sales initiatives.

This guide will help you navigate how to develop your custom tools stack as you continue establishing Strategic Alignment.

Everything that you've learned so far with respect to positioning and process can be executed manually. In some cases, that's the preference – at least to start out with. If that's your natural bent, I encourage you to open your mind to this training in order to see how the implementation of a unique tool stack could aid your efforts.

KEY ONE

The first key to building a custom marketing and sales tool stack is resource analysis.

If you or your team doesn't have an understanding of what resources are being used, then it's difficult to know what needs to be replaced with a tool. There are three main elements of your resources that need to be analyzed: necessary tasks, involved parties, and related assets.

Element 1: Necessary Tasks. The first step in analyzing your resources is to make a comprehensive list of all of the granular tasks necessary to implement your positioning and your process. If you've kept up with completing your implementation guides, you should have a great starting point.

Element 2: Involved Parties. The goal with this element is to understand how many hands are involved in the given task, so it's going above and beyond the owner. This comes in handy when making decisions about what to automate and who needs to be involved in the different pieces of technology you choose to incorporate into your tool stack.

Element 3: Related Assets. Where the involved parties element covered the people who participate in the tasks, the related assets element includes other resources currently used to execute the tasks. Related assets could be formal or informal, digital or analog.

List the necessary tasks related to the stages of your engagement process. Don't limit yourself to only the "big tasks;" consider everything that must be done at a certain stage to enhance the customer journey.

Next, list the involved parties of the necessary tasks.

Then, list the related assets that you are using to execute the tasks. Be very detailed.

Stage	Necessary Task	Involved Parties	Related Assets

Stage	Necessary Task	Involved Parties	Related Assets

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KEY TWO

The second key to building your custom marketing and sales tool stack is automation opportunities.

If you don't take advantage of these automation opportunities, your team will be more prone to burnout which will result in a subpar customer journey. When your team isn't operating at its best, then your customers won't experience the best of your team. There are two main elements that need to be considered when identifying automation opportunities: repeatability threshold and exhaustive efforts.

Element 1: Repeatability Threshold. Your repeatability threshold is the minimum number of times a task is repeated over the course of the year that your team deems it's time to automate that necessary task.

Element 2: Exhaustive Efforts. The necessary tasks that are exhausting your team's efforts are also important to note when identifying opportunities to automate.

It's important to weigh these two elements as you consider which automations to put in place. There are going to be some tasks that you repeat daily that may take a minute - to your team those may not be worth automating. There may be other tasks that you repeat monthly that take hours - here your team may advocate for automation. The purpose of this section is to recognize your automation opportunities and then prioritize them based on current cost.

Evaluate your necessary tasks, noting how often you are executing them annually.

Then, rate them on a scale of 1-5 (1 as the least exhaustive and 5 as the most exhaustive). If you have an idea of what they cost to manually execute, add that too.

After you've made your list of automation opportunities, rank them based on priority.

Necessary Task	Rating	Priority Ranking

Necessary Task	Rating	Priority Ranking

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KEY THREE

The third key to building your custom marketing and sales tool stack is stack connectivity.

It's critical that your tool stack is connected because if the different parts don't play well together, then you might as well go back to manual processes. There are two elements of stack connectivity: puzzle pieces and seamless integration.

Element 1: Puzzle Pieces. Establishing stack connectivity is more like putting together traditional puzzle pieces. They can be tricky to put together, but once connected, they make a beautiful picture, which brings me to element two.

Element 2: Seamless Integration. The thing about technology is you want it to be seamlessly integrated. It's easier if you find tools that play well together from the start. Then when you use a tool like Zapier to run automations, things go more smoothly. For example, HubSpot, PandaDoc, and Quickbooks are fundamental parts of our tool stack, and they are all natively integrated with one another. When we write a proposal in PandaDoc, we can link it to a Deal in HubSpot. When a proposal is signed, it can trigger an invoice within a specific time frame.

Research tools to use for the automations of your necessary tasks. Make sure to take notes on your findings, so you know which tool goes with which automation.

Tool	Notes

Tool	Notes

NEXT STEPS

- [ ] Demo the possible tools that can automate your process
- [ ] Decide on the tools for your custom stack
- [ ] Transition any existing systems to your new tools
- [ ] Train your team on the new tools
- [ ] Deploy new tool stack
- [ ] Evaluate implementation to optimize flow

Congratulations on completing your third module and implementation guide. You are on your way to synchronizing your marketing and sales efforts in such a way that you can scale your business without hassle. See you soon for your module on metrics!

REMINDERS

There is a live quarterly question and answer session on the **second Tuesday of the second month of the quarter from 12-1pm CST**. During this session, I will be available to help you navigate any blockers you are facing as build your custom marketing and sales tool stack.

If you need a little extra support, you can **book a 1on1 with me at strategicalignmentprogram.com/1on1**.