



# Future-proof Your Revenue Stack

Confident transformation starts with clarity. Use these assessments from our latest whitepapers to prioritize, plan, and roadmap your initiatives. Align your teams to change and realize the full success of your initiatives.

# Self-Assessment

**Instructions:** For each statement, score yourself 0 (Not in place), 1 (Partially in place), 2 (Fully in place). Add your total.

	Never	Sometimes	Often
Unified revenue workflows from quote-to-cash and lead-to-cash.	0	1	2
AI-ready workflows built on clean, connected data.	0	1	2
CPQ and commerce capabilities that handle complexity at scale.	0	1	2
End-to-end visibility across sales, service, and operations.	0	1	2
A trusted partner that simplifies complexity.	0	1	2

## SCORING

### 0–3 points: points: Exposed — At Risk of Falling Behind

Your revenue stack is fragmented and fragile. Disconnected workflows, siloed data, and brittle systems make it nearly impossible to adapt. As competitors modernize, your growth and competitiveness are increasingly threatened. Without change, you risk higher costs, frustrated employees, and lost customers.

### 4–7 points: Transitional — A Solid Foundation, But Vulnerable

You've made progress toward modernization, but gaps remain. Some workflows may be unified, but others still rely on outdated systems or manual processes. While you can operate today, you're not resilient to sudden market changes. Enterprises in this zone often overpay to maintain legacy stacks without realizing the ROI of true modernization.

### 8–10 points: Future-Ready — Built for Agility and Growth

You're aligned with the ServiceNow + Zaelab vision of CRM as a revenue platform. Unified workflows, connected data, and commerce capabilities mean you can adapt quickly, scale globally, and seize new opportunities. With AI-ready foundations and a trusted partner to guide you, your enterprise is equipped for sustained growth in the next era of CRM.

# Outsource or Build In-House?

Not every distributor needs or can afford a full in-house digital team from day one. For many, outsourcing key roles can be a faster, more cost-effective way to access the specialized expertise required to launch and scale eCommerce. The right partner can fill skill gaps, accelerate progress, and reduce the risk of costly missteps.

That said, outsourcing isn't a one-size-fits-all solution. The best approach depends on your internal capabilities, budget, and digital maturity. A contractor may be sufficient for short-term needs, while a mid-size agency might be ideal for distributors ready to invest in long-term digital growth. Here is a quick guide to the most common outsourcing models, with pros, cons, and considerations to help you choose the right fit:

## Contractors

- ✓ Affordable
- ✗ High risk without internal oversight

## Small Agency

- ✓ Good for small-scale projects
- ✗ May lack full-scope expertise (e.g., UX, platform, marketing)

## Mid-Size Agency

- ✓ Balanced cost, capability, and stability
- ✗ Often the best fit for distributors scaling digital initiatives

## Enterprise Agency

- ✓ Global reach and deep specialization
- ✗ High cost; often unnecessary unless multinational

**Pro Tip:** No matter the option, ensure your partner understands distribution-specific challenges like ERP integration, complex pricing, and data standardization.

# Building the Right Culture for Long-Term Success

Whether you're building in-house or relying on external partners, none of it works without the right internal culture. Tools and talent alone won't drive transformation. People and processes will.

A successful digital strategy requires a mindset shift across your organization. Teams must be willing to embrace new ways of working, challenge legacy thinking, and collaborate across departments. Without this cultural foundation, even the best digital plans will struggle to take root.

Here are the key elements of a modern digital culture and how to foster one that supports ongoing innovation, agility, and growth:

- ☐ **Upskill Your Existing Team**  
Retrain instead of replacing. Internal employees hold valuable institutional knowledge. Investing in training helps bridge the digital gap without losing operational context.
- ☐ **Leverage External Expertise**  
Not every role needs to be full-time. Agencies and consultants can fill key knowledge gaps while internal teams scale.

- ☐ **Develop Agile Processes**  
Once your foundational systems are in place, shift to agile workflows that allow for testing, iteration, and rapid optimization.
- ☐ **Encourage Cross-Functional Collaboration**  
Digital success requires Sales, IT, Ops, and Marketing to work as one. Set up regular touchpoints and feedback loops to align on priorities and solve real customer problems.
- ☐ **Focus on Data-Driven Decision Making**  
Set meaningful KPIs and track website adoption, order frequency, and customer behavior. Let data, not opinions, guide platform evolution.
- ☐ **Foster a Culture of Innovation and Learning.**  
Give teams the space to experiment and fail forward. Fund attendance at digital commerce events, training programs, and certifications to stay ahead of the curve.
- ☐ **Monitor, Measure, and Optimize**  
Make digital progress part of your monthly review cycle. Track wins and setbacks to continuously refine your strategy.

[Get the full CRM guide](#)