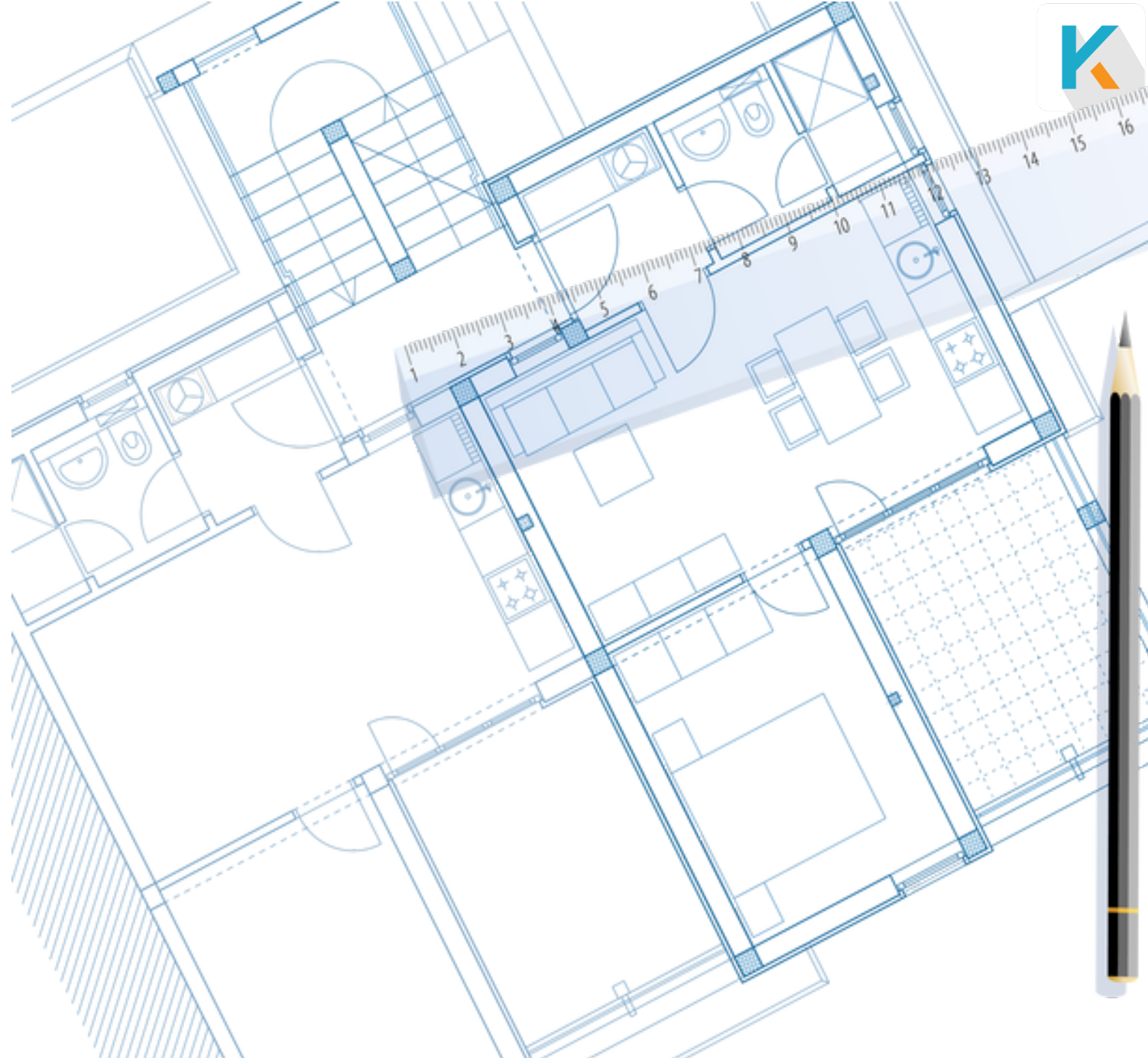


Sales Enablement Blueprint

klyck.io





Blueprint Overview

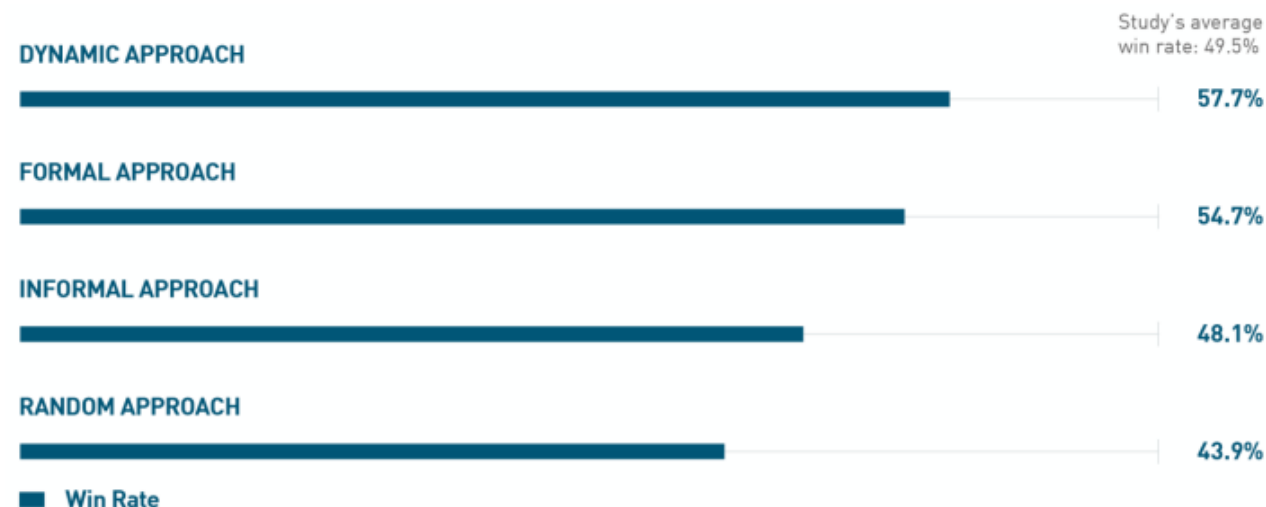
Why You Need a Sales Enablement Blueprint

Establishing a formalized blueprint is an imperative first step when developing and preparing to launch your sales enablement program. Your blueprint functions as your business plan and is your guide for turning random efforts into a formal, scalable, measurable, and strategic plan that has a rewarding impact on your business. When it is unclear who is accountable for sales enablement efforts or which teams have a direct involvement, the results are often misaligned and ineffective. This blueprint is designed to clarify responsibilities and align cross-functional collaboration to maximize the impact of your team's enablement efforts.

Sales Enablement Approach vs. Win Rate

Your organization's strategic approach to implementing a sales enablement program directly determines its overall success. According to [CSO Insights](#), in a formal study conducted in 2018, organizations who took a formalized approach backed by a blueprint reported significantly higher close rates on forecasted deals.

By using this formal blueprint, you will be able to outline key goals, stakeholders, and necessary tools to help your sales enablement project succeed, while consistently engaging the right teams every step of the way.



2018 CSO INSIGHTS SALES ENABLEMENT REPORT.

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Steps for Success



1. Choose a Dedicated Project Manager

It is imperative that your organization chooses a dedicated individual for overseeing and coordinating the success of the project by allocating a minimum of 6 hours each week to focus on project needs, strategy, and general support. Your manager will be responsible for communicating with all relevant stakeholders, including any vendors, to facilitate the success of the project. Project managers should have at least 5 years of experience in sales, marketing, onboarding programs or project management with a strong understanding of company processes.

2. Draft Your Sales Enablement Blueprint

The sales enablement blueprint acts as a simplified overview of your entire sales enablement project, it will define your key goals, deliverables, stakeholders and metrics used to measure success. Sit down with your executive team (CEO, VP of Sales, VP of Marketing) to identify what your team wants to achieve.

3. Develop an Ongoing Training Plan

It is extremely important to develop a training/coaching plan that consistently educates, engages, and informs reps about their products, offers or markets. Most organizations will train reps by using a combination of self-help material online and live training sessions - your training plans frequency and method depends on your project scope and tools.

4. Develop a Communication Plan

There are many ways to disseminate information to teams but not every way is effective, most teams create internal communications that often flood inboxes. A well thought out communication plan steps away from traditional methods of forcing information onto reps and instead provides a self-sufficient solution designed to attract reps without interrupting their busy schedule.

5. Create Engaging Content & Make It Easily Accessible

Ensure that reps deliver an unforgettable customer experience every time by having access to the right collateral at every stage of the buying process. Centralize your content and make it easily accessible from anywhere, allowing sales to spend more time selling and less time searching.

6. Streamlined Sales Enablement Tool

Identify a unified sales enablement solution that provides training and coaching.



Getting Started

Choosing a Project Manager

It is imperative that your organization chooses a dedicated individual for overseeing and coordinating the success of the project by allocating a minimum of 6 hours per week to focus on content needs, strategy, and general support. Your project manager will be responsible for communicating with users, internal teams, and vendors to facilitate the success of the project.

Project Manager Role

Stepping into the role of a project manager can seem like an overwhelming job, but there are many simple steps that can be taken to ensure your success. As a project manager you must clearly define and enforce goals with your extended team, while also communicating and celebrating successes along the way.

Whether you're managing a team of 5 or preparing to launch an enterprise wide sales enablement project, we want to ensure you have the knowledge and resources to succeed at every step of the way. Below are some steps to help you get started with your project.

Getting Started

1. Fill out the blueprint template with your executive team to identify the project goals.
2. Identify the user base for project (divisions, teams, and employees who will be involved either supporting or receiving).
3. Create and implement a communication plan (updates to users and consistent executive project reviews).
4. Create and implement a training plan (live monthly training, onboarding, videos, best tips, etc.).

If implementing Klyck

5. Identify integrations to increase utilization (CRM, SSO, DAM/CMS).



Blueprint Template

GOALS	Establish 2-3 clear and achievable goals	
SUPPORTING TACTICS	Describe team's key responsibilities and activities that will help achieve goals	
STAKEHOLDERS	Receivers	Receivers of the service such as sales teams or roles within a team (inside sales, outside sales, distributors, etc.)
	Supporters	Supporters of the service such as marketing or operations (create content for sales to use)
KEY DELIVERABLES	Short-Term (6 months)	Identify short term deliverables that can be completed within 6 months
	Long-Term (6 - 18 Months)	Identify long term deliverables that can be completed after 6 months
METRICS	Leading Metrics	Identify metrics that help measure the success of your project and activities (# of calls, # of meetings, # of opportunities, # of user logins, etc.)



Key Deliverables Template

Short-Term (Less than 6 months)	Long-Term (Longer than 6 months)
Short-Term Deliverable #1 Description & Objective	Long-Term Deliverable #1 Description & Objective
Short-Term Deliverable #2 Description & Objective	Long-Term Deliverable #2 Description & Objective
Short-Term Deliverable #3 Description & Objective	Long-Term Deliverable #3 Description & Objective
Short-Term Deliverable #4 Description & Objective	Long-Term Deliverable #4 Description & Objective
Short-Term Deliverable #5 Description & Objective	Long-Term Deliverable #5 Description & Objective
Short-Term Deliverable #6 Description & Objective	Long-Term Deliverable #6 Description & Objective



Short-Term Deliverables Example

Short-Term (Less than 6 months)	Tasks Required
Setup Klyck Environment Clean up the environment structure by renaming, removing, and hiding categories from the content library. Keep environment simple with only a few categories.	<ol style="list-style-type: none">1. Identify user base for project (division, team, and list of users - ideally 10-50 users with a diverse enough scope in different positions to properly test)2. Identify content required for teams using platform3. Determine categories needed for content and conversations library
Organize & Tag Content Organize the content library by removing, adding and renaming content in the library while also placing in correct categories. Use master excel sheet to make edits and changes to content/conversations data.	<ol style="list-style-type: none">1. Create and use master content and conversations excel sheet (Klyck - provide excel sheet with all content and metadata fields)2. Using master sheet, edit content metadata3. Place content into correct categories4. Tag content with keywords
Route Content, Conversations & Users Route content, and conversations to users based off their profile criteria, need to define filters and user profile criteria. Adjust user profiles once criteria is confirmed.	<ol style="list-style-type: none">1. Choose routing/filters2. Adjust content, conversations, and user routing
Create Communication Plan Create and implement communication plan to notify users on relevant enhancements or features while also establishing regular meetings with stakeholders to review project progress	<ol style="list-style-type: none">1. Identify communication plan options (frequency and reason)2. Create and confirm communication plan
Setup Weekly & Monthly Reports Set-up exportable monthly and weekly reports through curator to update key stakeholders on utilization and activity	<ol style="list-style-type: none">1. Discuss most effective way to deliver analytics reports2. Show Mayer/Establish process for receiving or accessing reports



Sales Enablement

Steps for Success

1. Dedicated Project Manager (6hrs/week minimum)
2. Sales Enablement Blueprint (identify goals, deliverables, teams involved)
3. Ongoing Training & Coaching Plan (group + self-help training)
4. Communication Plan (stakeholder updates and executive reviews)
6. Accessible & Digestible Content
7. Streamlined Tools

Choosing a Project Manager

It is imperative that your organization chooses a dedicated individual for overseeing and coordinating the success of the project by allocating a minimum of 6 hours per week to focus on content needs, strategy and general support. Your manager will be responsible for communicating with users, internal teams and your vendor to facilitate the success of the project.

Project Manager Traits/Experience

- 5+ years of experience in sales, marketing, onboarding programs or project management
- Passionate about increasing collaboration between sales, marketing and operations with a proven ability to lead multi-stakeholder projects
- Organized, detailed oriented and strong ability to communicate with multiple groups
- Thorough understanding of organization and how various internal groups function