SALES

ENABLEMENT

CHECKLIST

HOW TO BUILD YOUR STRATEGY
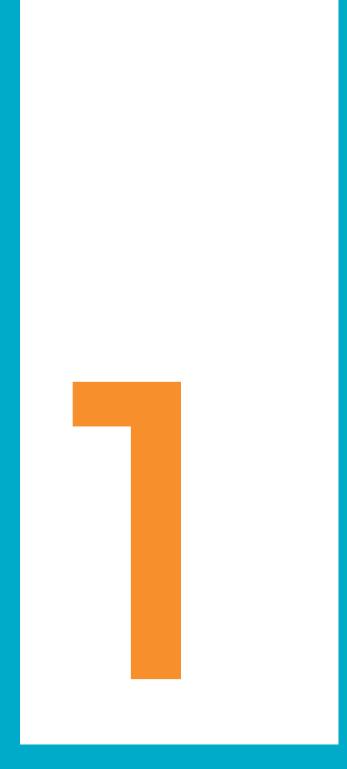
SALES ENABLEMENT CHECKLIST

HOW TO BUILD YOUR STRATEGY

In this eBook, we'll outline the most important checklist items to get your sales enablement strategy defined and moving.

Every organization will have its own unique needs, but this list is meant to capture the core elements that you'll want to consider when getting started.

Once you've outlined all the items on this list, you should be ready to start moving forward with mobilizing your strategy and selecting the right sales enablement platform for your business.

1

Goals and Key Outcomes

As expected with any major business strategy, it's important to make sure that you have well defined goals and outcomes. Start by deciding upon two to three reasonable goals for your sales enablement project.

These can include – but aren't limited to - better sales and marketing alignment, determining sales training needs, and insight into customer engagement. Once you have established what your goals are, the next step is deciding how you'll go about achieving them.

Create a blueprint with action items to make sure you are meeting your goals and outcomes. Sometimes when embarking on a new project, it's easy to get caught up in the smaller details while losing sight of the bigger picture. By creating a blueprint and referring back to it often, you can keep your focus on smaller achievable objectives that will guide you towards your ultimate goal.

Setting goals will also help to keep your team engaged and motivated. As you accomplish smaller goals that bring you closer to your final goal, the desire to carry through on the project to completion grows. The more results you see, the more likely you are to keep going.

Once you've developed your goals and key performance indicators (KPIs), you'll want to make sure that you're pulling in teams from both sales and marketing.

- [ ] **Establish 2-3 clear and achievable goals for your sales enablement project**

- [ ] **Determine key outcomes for goals listed above**

- [ ] **Complete the blueprint with action items to ensure you are meeting your goals and outcomes**

- [ ] **Assign stakeholders from both sales & marketing teams**

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Stakeholders and Key Duties

Now that you've identified your goals and created a blueprint to achieve them, it's time to look at the receivers and supporters. The most likely receivers are the sales team (inside sales, outside sales, and distributors) and the most likely supporters are the marketing team. Tools like sales enablement work to align sales and marketing in a tangible way. For more info, checkout our article on the importance of sales and marketing alignment.

It is also essential to outline the responsibilities of the key stakeholders as they pertain to helping achieve your goals. These people will provide key insights and will complete the front-line activities that will ultimately aid in the successful deployment of the project.

Continue to check in regularly with, at minimum, quarterly meetings. Keeping these stakeholders in the loop ensures project plans are a reflection of the real needs and priorities.

Another benefit of stakeholder involvement is winning support and gaining commitment to the project, which ultimately increases the chances of sustainability after the project has been completed.

- [ ] **Determine who are the receivers and who are the supporters**

- [ ] **Describe the team's key responsibilities and activities that will help achieve the defined goals**

- [ ] **Identify key business stakeholders who will participate in quarterly project checkpoints**

- [ ] **Find key advocates in the receiver group to attend quarterly checkpoints**

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Project Essentials

So, we've discussed goals and stakeholders, but let's now look at where the project fits in your overall business strategy.

First, you'll want to have an organized training plan for the project. This means getting the right training and resources to the teams in the field using the sales enablement tools and are a part of the sales enablement process.

Make sure that you have someone in the organization who is capable of leading training for those teams. You'll want to create a thorough training strategy so that teams are not only trained on how to use the sales enablement tool, but also understand the process of sales enablement in the organization.

Next, break down your goals into short term deliverables that can be completed within six months and those that will take longer. This is all about setting quick achievable goals that will gain momentum in the project. Make sure you are using SMART goals in your project so that you are setting your team up for success.

When you make goals that are specific, measurable, attainable, relevant, and time-bound, you're increasing your odds for success by verifying that the goal is achievable, identifying the metrics that define success, and creating a roadmap to get to those metrics.

- [ ] **Define where the project fits with the overall business strategy**

- [ ] **Schedule quarterly checkpoints for project goals**

- [ ] **Organize a training plan for the project**

- [ ] **Establish a quarterly communication plan for project stakeholders**

- [ ] **Identify short term deliverables that can be completed within 6 months**

- [ ] **Identify long term deliverables that will be completed after 6 months**

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Metric and KPIs

Finally, you'll want to identify metrics that help measure the success of your project and activities. As with any process in your business, you should be able to identify a small handful of metrics that correlate to the outcomes you seek on a day to day, and week to week basis.

Some examples of typical sales enablement metrics are: number of sales team logins to the app, number of presentations created by sales, number of content shares by sales, number of opens and engagements by prospects, number of content views by prospects, etc.

If you have your sales enablement system connected to your CRM, you can easily start to track ROI and deal influence metrics as well. This can be done by correlating prospect engagements with closed deals and revenue dollars.

Once you get clear on the results you want to achieve in each area, you can drill down to determine the activity and effectiveness measures which drive these outcomes.

Remember, revenue results are important, but you can't manage them at the start of the project. However, you can manage the activity and effectiveness of your people in order to achieve those results. Starting small and measuring leading indicators is the best way to get started.

- [ ] **Identify metrics that help measure the success of your project and activities (# of presentations, # of meetings, # of opportunities, # of user logins, etc.)**

- [ ] **If applicable, sync your sales enablement system to your CRM to track deal influence and ROI on your content**

- [ ] **Establish monthly communication plan for metrics to be sent to necessary stakeholders**

- [ ] **Ensure that sales and marketing leaders can access these metrics in real time**

ABOUT
KLYCK.IO

Klyck is a global leader in B2B sales enablement software, serving clients in industrial manufacturing, electrical distribution, industrial automation, biotech, medical device, and high-tech industries.

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