



Achieve Sales Excellence with Sales Enablement

TPM's Proven Method to Success in 9 Steps



Table of Contents

Introduction | 3

Getting Started | 4

Implementing Sales Enablement

Step 1: Create a Sales Enablement Charter | 5

Step 2: Map Out Your Buyer's Journey | 7

Step 3: Align Marketing Collateral with the Buyer's Journey | 9

Step 4: Manage Your Sales Enablement Content | 10

Step 5: Expand Sales Enablement to Your Customer-Facing Teams | 11

Step 6: Measure Your Success | 12

Step 7: Standardize Reporting | 13

Step 8: Optimize Your Sales Enablement Activities | 14

Step 9: Review and Refine Your Strategy | 15

Setting Yourself Up for Success | 16

Introduction

This sales enablement playbook is TPM's proven method of equipping your sales teams with the content, tools, and training they need to improve sales performance and drive impact across your go-to-market strategy.

B2B sales enablement can be complicated, but it doesn't have to be. We have built an easy-to-follow playbook to help you navigate the sales enablement world and boost your revenue.

This **9-step guide** provides you with a step-by-step breakdown of how you can implement sales enablement strategy from scratch. We lay it all out and tell you exactly:



What you need to get started



How to implement a strategy that sticks



How to help your organization succeed, no matter the challenge



You will be most successful implementing sales enablement once you know your organization's current sales enablement readiness and maturity. If you haven't already, we suggest working your way through **the first playbook** in this series first so you can identify your unique challenges and gold stars in sales enablement.

[DOWNLOAD PLAYBOOK →](#)

Getting Started

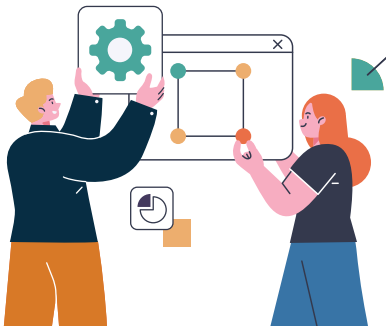
To begin implementing sales enablement, first you need to gather your **key people**, **processes**, and **technologies**.



People

CEO	VP of Customer Success
VP of Marketing	VP of Product
VP of Sales	Manager or director of sales enablement

Key processes



- Lead generation strategy
- Lead scoring and qualification matrices
- Organization's vision and current goal
- Success metrics and key performance indicators (KPIs)
- Account-based marketing strategies
- Content creation strategy



Key technologies

CRM	Content management system
Sales outreach	Marketing automation
Sales enablement platform	

Once all these boxes are checked, it's time to get started! The following steps will walk you through implementing sales enablement in your organization.

Implementing Sales Enablement



STEP 1

Create a Sales Enablement Charter

The first step to implementing sales enablement is to develop a plan, also known as a charter. This business plan lays out the who, what, when, where, and why of your program.



Why is a charter important?

A plan is linked to greater success as it sets the groundwork for a scalable strategy that will stick. [97% of organizations](#) with a formal charter said sales enablement has increased the overall success of their company's sales performance.

Having a plan in place is also more likely to gain the support of your leadership team. Acting as a blueprint, your charter outlines the mission, key stakeholders, and expected results, ultimately getting everyone on the same page.

Use the following template to get started. →

Sales Enablement Charter

Goals

1.

2.

3.

Supporting Tactics

Stakeholders

Key Deliverables & Their Timeframe

Short-term projects

Long-term projects

Success Metrics (KPIs)

Let's break down each section:

- ▶ **Goals:** Highlight the mission statement or goal(s) of your sales enablement strategy. For example, develop search engine authority, increase lead generation, decrease sales cycle length...to name a few.
- ▶ **Scope:** Articulate the specific activities that fall within the scope of sales enablement. For example, developing search engine authority will fall under the scope of marketing teams.
- ▶ **Stakeholders:** Record the key stakeholders involved in your strategy. These people could be your marketing managers, sales reps, people teams, etc.
- ▶ **Measurable outcomes:** List the KPIs you will be using to measure the success of your strategy. In this example, these could be search visibility, organic traffic, conversion rate, etc.

STEP 2

Map Out Your Buyer's Journey

Imagine approaching people from different departments in your organization and asking them: *When does the customer journey begin?*



Your marketing teams might say,
"When they see our ad on Google."

Your sales teams might say,
"When I follow up with them by email about a whitepaper they downloaded."

Your customer success teams might say,
"When we begin onboarding them."

When it comes to team alignment, often it can feel like everyone has conflicting views — even when you are all working towards the same goal.

The buyer's journey is the most important framework in sales enablement. Done well, it is an opportunity to break down siloed departments and align your teams. Not to mention every sale your company makes is the result of a buyer completing this journey. It's in your best interest to understand it.

So, where do you get this information? **You need to carefully map out a customer path.**

1 Gather feedback from customer-facing teams.

Sales reps, account managers, and customer success managers will be the right people to uncover potential gaps in your messaging.

2 Extract data from your technology.

Information from your CRM, website analytics, sales outreach, and sales enablement technologies will provide useful insights into customer behavior.

3 Collect market research.

By getting out of the office and into the market, you learn valuable information about your customers and evaluators. It is an opportunity to understand how they want to buy so you can match the experience.



As you gather information about your customer's path, start compiling it into a buyer's journey framework.

Soon, your ideal customer profile, buyer personas, and your buyer's paths to purchase will emerge.

This process can take some time, often upwards of 30 to 90 days depending on the complexity of the buyer's journey. Be persistent. Take note of any information gaps and keep asking questions.

STEP 3

Align Marketing Collateral with the Buyer's Journey

The next step is to align your content with each stage of the buyer's journey.

With so much of the modern buying process happening digitally, **your content strategy should relieve information overload for your customers.** This means creating thoughtful content and serving it to the right person, in the right channel, at the right time in their buyer journey.

Stage in Buyer's Journey

Your Objective

Awareness

To educate the customer, without talking about your products

Consideration

To offer guidance in shortlisting a suitable solution to the prospect's challenges

Decision

To convince the buyer and help them make an informed decision

Retention

To surprise and delight the customer with their new solution



Remember: content is to serve! It's there to answer questions your buyer has in their journey. Don't create content for the sake of creating content!

STEP 4

Manage Your Sales Enablement Content

Because sales enablement content is created and managed by multiple teams, it can easily get out of control. Think about it.



Your marketing team creates many assets and stores them in a content management system (CMS) to track performance during lead generation efforts. Sales teams download these assets to use in their own outreach campaigns.

But when there are updates to the assets on the CMS, like brand design or messaging changes or completely removing old material, salespeople still circulate the older versions — creating an inconsistent experience for buyers.



Intranets and sales enablement platforms are essential tools for marketers and sales teams to host and manage all sales enablement content.

Highspot and Seismic are just two examples of effective sales enablement platforms that can provide visibility across the sales content lifecycle. They have powerful search, scoring, and syncing capabilities that keeps marketing and sales organized, aligned, and on-brand.

STEP 5

Expand Sales Enablement to Your Customer-Facing Teams

Once you refine and start scaling your sales enablement strategy, it is important to expand it beyond your core sales team to include all client-facing roles.

Just like your sales teams needs information to effectively communicate with prospects, customer success teams, for example, require similar expertise to succeed. While they may not be closing deals, they do have an impact on revenue in the form of contract renewals, expansion, and client satisfaction.



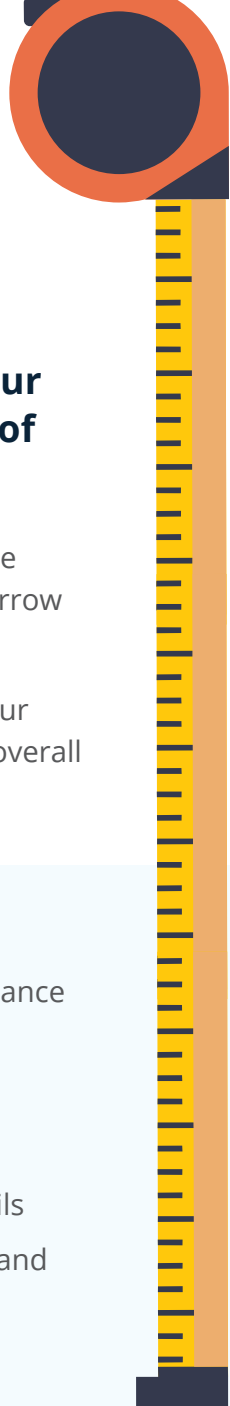
Consider implementing these best practices to create great customer experiences.

1 Encourage customers to share feedback. Hang out where your buyers spend their time, social feeds, discussion boards, and online reviews. Ask happy customers for testimonials and case studies to promote your business and capture the success of your customers.

2 Create customer education content. Content plays a key role in customer retention and loyalty. By delivering value throughout the buyer journey, your customers stay engaged and are more likely to become advocates for your brand.

3 Build a customer success team. (Or start one if you haven't already!) These teams are integral to sales enablement. The insight they have is extremely valuable to other departments: revenue teams rely on their data to predict growth, product teams use their feedback to release new features and fix bugs, and marketing looks to advocates and helpful messaging.

4 Fill gaps in customer self-service experience. Knowledge bases, AI chatbots, customer portals, and community forums can help fill gaps and address friction points your customers come across in their buying journey.



STEP 6

Measure Your Success

This next step is all about extracting data-driven insights about your sales enablement efforts. Regularly analyzing sales metrics is one of the best ways to know if your strategy is working.

Setting metric-oriented goals is essential for sales enablement assessments. Remember the goals in your sales enablement charter from step one? Keep these goals in mind as you narrow down which metrics matter to your organization.

Here are some broad categories of metrics you can use to measure the effectiveness of your strategy. You can mix and match these any way you want, as long as they tie back to your overall goals.

Content Usage

Measure how your sales enablement content is performing.

Examples of KPIs:

- ▶ Content downloads from intranet compared to sales performance
- ▶ Click-through rate of internal company newsletter
- ▶ The percentage of top-performing salespeople who download assets monthly

Sales Proficiency

Measure the day-to-day sales performance of individual reps, teams, and your organization

Examples of KPIs:

- ▶ Performance of sales cadence emails
- ▶ Marketing responsible for pipeline and revenue influence numbers
- ▶ Lead tracking in CRM
- ▶ Quota attainment

Account-Based Marketing (ABM)

Measure the performance of key accounts, as opposed to individual leads

Examples of KPIs:

- ▶ Engagement by account
- ▶ Churn rate
- ▶ Average contract values
- ▶ Sales velocity

Social Selling

Measure how your efforts impact prospect nurturing and future lead generation

Examples of KPIs:

- ▶ Content engagement rate
- ▶ Network growth
- ▶ Prospect referrals
- ▶ Second degree connections

STEP 7

Standardize Reporting

Now that you have all this data, it's time to peer into it and agree on a set of reports.

Marketing reports inform decisions, drawing important conclusions and helping to meet goals by gathering metrics in one place. The reports you choose will vary depending on what data you are looking at and its purpose. In B2B sales enablement, some common reports are:



Report	Business Question
Content coverage	Do reps have what they need when they need it?
Content freshness	Is the content up to date?
Content usage	What gets used?
Pitch activity	What gets pitched?
Content comparison	How is it being modified?
Business impact	Does it generate revenue?

Sales leadership often has a high-level understanding of what reports mean to business but can lack the technical knowledge to create them. You might need the help of sales enablement software, or a tracking spreadsheet might also do the trick.

STEP 8

Optimize Your Sales Enablement Activities

Once your teams are in lockstep and have firmly grasped key sales enablement processes, it might be time to start using technologies to automate and streamline the process.

In low maturity organizations, a basic CRM should be in place. **CRM software** can help track customer interactions, shorten the sales cycle, and provide data and insights to continue improving your sales process. The CRM you implement should be robust, simple to use, and scalable so it can handle the growth of your company and maturity of your sales enablement processes.



Sales outreach tools alleviate most of the manual, repetitive work associated with sales outreach so salespeople can focus more on higher value tasks. In medium to high maturity organizations, sales enablement teams provide content like email templates and marketing materials for salespeople to customize and schedule through these tools.

Sales enablement platforms provide visibility across the sales content lifecycle. They typically have powerful search, scoring, and syncing capabilities that keeps marketing and sales organized and on-brand.




It will take some experimentation to figure out the best sales enablement solutions that work for your teams, but it is the most tactical approach. Lacking a strategy behind your sales processes and relying on technology might harm salespeople more than it helps.

STEP 9

Step 9: Review and Refine Your Strategy

Sales enablement is a big initiative. It is a discipline that needs constant adjustment as target markets evolve, products change, and businesses pivot. Because of this, it is imperative that you develop a regular cadence of communication between leaderships and cross-functional teams.



Find a rhythm that works for your organization.

We recommend meeting at least once per quarter to keep everyone accountable to their goals, discuss obstacles, and collaborate on solutions. You might need to meet more frequently at launch and adjust from there.

The strategy you develop to support your sales enablement activities should be treasured — it's singlehandedly one of the most important disciplines for your organization's success. **Review and refine it as needed and you'll be rewarded.**

Setting Yourself Up for Success

With substantial rewards come the occasional bumps in the road, especially at the beginning. Implementing a complex function like sales enablement will take multiple tries to get right, but don't be discouraged. The best way to overcome obstacles is simply knowing what they are and how to tackle them.

Sustainability of your strategy

Getting teams to adopt a new system is challenging. There will always be resistance to change and some people will feel forced to adapt. Overcome this by assigning a clear owner to drive sales enablement, including your sales enablement charter in your sales playbook, and rewarding early adopters.

Automated processes too soon

Automation works well when sales enablement processes are well established and understood, but initially sales enablement brings up a lot of questions and not a lot of answers. Sometimes what you automate is correct...at the time. But things change. So you have to have a fluid ability to adjust.

Sales reps need support

Sales reps are often inadequately trained to successfully engage with leads. Ensure your sales training is centered around building skills for customer-facing situations in real time. Evaluate your training efforts through real-world applications, time-spaced repetition, and coaching. Focus on building skills and confidence and you will see greater and more sustainable results.

Foggy perspective on your sales process

Sometimes your perspective prevents you from seeing what exactly needs to be done. If you find yourself doing the same thing over and over while expecting different results, you might want to get an outside perspective on the situation. Find a third-party agency who can approach your strategy with a fresh point of view.



Your Partner in Sales Enablement

TPM's sales enablement experts bring their deep experience partnering with brands of all sizes, acting as an extension of your team on anything from marketing consulting, strategy, content development, to sales enablement services.

By bringing together marketing, product, and customer-facing teams we help make salespeople more effective and able to better communicate the value of the products they are selling. Learn how we can help you reach your goals by contacting the experts at TPM today.