



CSO Insights™

The Research Division of Miller Heiman Group



2017

CSO Insights Sales Enablement Optimization Study

2017 Sales Enablement Optimization Study

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2017 Sales Enablement Optimization Study

Executive Summary

INSIDE THIS REPORT

This is CSO Insights' third annual, global *Sales Enablement Optimization Study*. Sales enablement is a fast-growing discipline, and in the past year it has decisively moved from the margins to the mainstream. This report presents the latest research on who's using it, and how and why, and includes definitions, models, data charts and examples. New in this report is the Sales Force Enablement Clarity Model, which serves as a guide as you assemble your sales enablement discipline step by step.

MAJOR FINDINGS

Sales Enablement has become firmly entrenched within sales organizations.

Almost 60% of respondents now have a Sales Enablement function. Further, the question "Who owns sales enablement?" can be answered with more certainty every year. The trend shows that increasingly (72.5%) sales enablement reports senior sales management.

Enablement teams set sights on significant goals, yet struggle to consistently achieve objectives

The top three performance improvement goals are 1) increase revenues; 2) increase margins; 3) increase new account acquisition. The top three productivity goals are 1) increase selling time; 2) decrease onboarding time; 3) streamline opportunity management process. Yet organizations still struggle with measuring such outcomes. And, only slightly more than 1/3 of respondents agreed that they had achieved the majority of their objectives.

Using the customer as the central focus has a tangible return

Organizations that implement a dynamic sales process and align it to the customer's journey have higher win rates and quota attainment than those with lesser alignment and lesser degrees of process.

An enablement charter pays off

Although increasingly overlooked in the rush to get a sales enablement function established, an enablement charter is linked to quota attainment improvement of 27.6% over the average rate.

Training shows improvement and impact. But, customer-centered training remains a gap.

Overall training effectiveness is up. Yet ROI justification, social selling and customer journey training remain gaps. Effective training, particularly in onboarding, social selling and sales methodology, show higher quota attainment by double digits. Social selling is a particular standout, linked to variances of 33%.



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Content sees improvement in origin. Product-related assets remain a strength.

On the positive side, sellers need to create less content on their own than reported in the past. Product-related assets, both internal and customer-facing, remain a strength for organizations. The opportunities lie in assets such as ROI templates, case studies, playbooks and relationship maps.

Sales coaching can improve performance impact

Organizations with a dynamic sales coaching approach enjoy higher-level customer relationships, and this, in turn, improves sales performance, such as win rates by double digits. Unfortunately, less than 1/3 of organizations (30.3%) have a formal or dynamic coaching process.

To scale and sustain, enablement must be based on a firm foundation

Research reveals three pillars which need to be in place in order for enablement functions to improve their success rates: formal collaboration (shown in less than 20% of respondents), integrated technology (SECM adoption reported in less than 20% of respondents) and a clear governance model. All three of these areas remain areas of focus for even the most sophisticated of enablement teams.

We close the report with reflections on how sales enablement has changed over the last year and where functions may wish to focus their efforts for the coming year. We hope you will get value and guidance out of the report to evolve your enablement practice.

We thank [Qstream](#) for sponsoring this report.

Tamara Schenk

Research Director

tamara.schenk@csoinsights.com

@tamaraschenk

Jim Dickie

Independent Research Director

jim.dickie@csoinsights.com

@jimdickie



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Chapter 1: The State of Sales Enablement as a Discipline

In 2013, CSO Insights began tracking the emergence of sales enablement, a new trend related to optimizing sales performance. As part of our research that year, we asked study participants if their company had dedicated any personnel exclusively to enablement. Of the 1,000+ survey responses we received, 19.3% said “yes” to that question. This got our attention and prompted us to start a deeper level of analysis to see *if and how* this new discipline in sales would evolve over time.

We continued to see a growing number of sales organizations implementing this function, so in 2015, we launched our first *Sales Enablement Optimization Study*. The intent was to dig deeper into the *what and how* of sales enablement. The initial study gathered over 75 metrics from 300+ survey participants. Their input started to clarify the roles that sales enablement personnel were asked to take on, how priorities for sales performance improvement were being set, the goals to be achieved, how the discipline was staffed and funded, etc. Most importantly, we got direct feedback on the outcome of sales enablement initiatives, which allowed us to see both successes and areas for improvement.



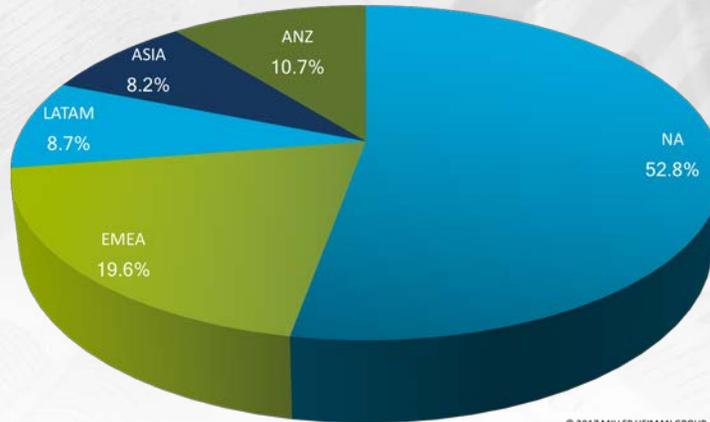
The following report is the result of our third annual *2017 Sales Enablement Optimization Study*. As you can see in the chart, sales enablement has witnessed a significant increase in adoption in the last year. Now, 59.2% of survey participants say they have this function up and running within their company, and another 8.5% acknowledge that they have plans to do so in the coming 12 months. This makes it clear that the sales enablement discipline has become a standard part of doing business. The past year also witnessed the founding of the [Sales Enablement Society](#), further demonstrating a commitment to making sales enablement a formal part of sales organization management.

In this report, we will share the highlights of our *2017 Sales Enablement Optimization Study* to provide an understanding of how this function continues to evolve and what factors are contributing to its success. We will also look at areas where additional progress needs to be made if we are truly going to empower our sales teams to succeed.

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Study Demographics

Geographic Analysis



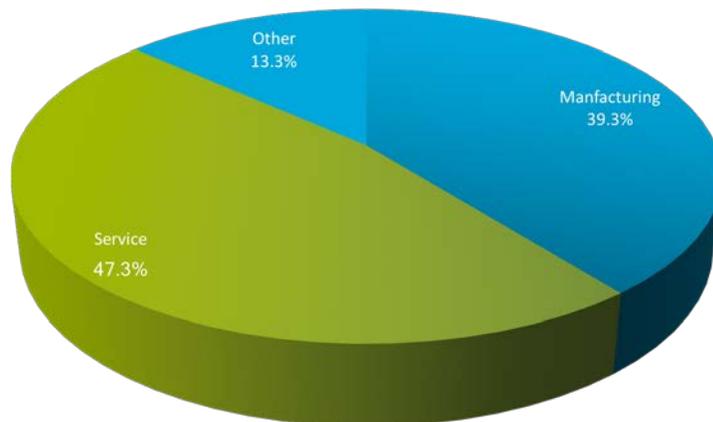
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The number of participants in this study has increased from just over 300 sales professionals in the Inaugural study to just under 500 this year when we made the data cut for this report. We truly appreciate the support of the study participants who invested the time to give us their input. As we have improved our understanding of what sales enablement involves, we have also increased the number of metrics we are tracking to over 100.

We again endeavored to make this a worldwide study. The chart provides a breakdown of study participation by geography. While just over half of the input came from organizations in North America, the international communities were also well represented. In addition, within the geographies, we invited firms with sales enablement practices to ensure we had meaningful data for the analysis.

The following two charts overview the high-level makeup of industries represented as well as the size of the organizations in terms of total annual revenues.

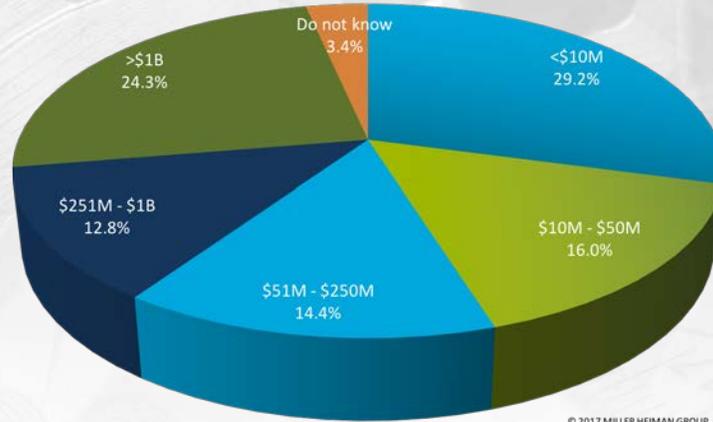
Industry Macro Analysis



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Revenue Analysis

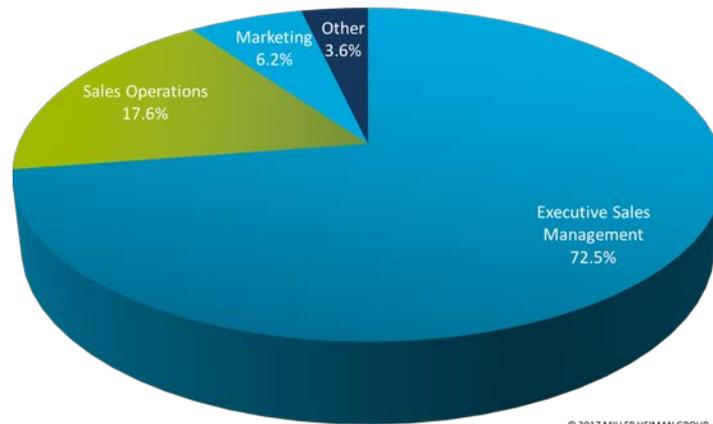


To promote additional participation, we will keep the study open during the remainder of the year. This will allow us to analyze the data further and provide research clients with segmented views of the study findings.

Reporting Structure

Not only do we have a significant increase in the percentage of firms with a sales enablement function, but we also see a noticeable shift in the reporting structure as well. The chart summarizes the responses. In nearly three-quarters of the cases, sales enablement now reports directly to senior sales management. This compares to 60.8% in 2016, demonstrating that more companies see sales enablement in parallel to, and no longer underneath, sales operations (20.9% in 2016).

Enablement Reporting Lines



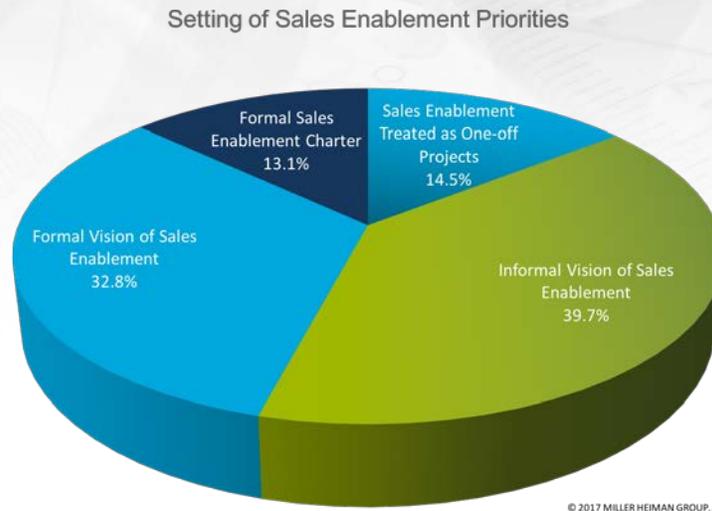
In terms of the size of the sales enablement team, 28.6% of the respondents said the team consisted of six or more professionals, 39.8% said two to five professionals, and 31.6% said sales enablement was a part-time or single-person function. This compares to 21.1%, 44.6%, and 34.4% respectively in the 2016 Sales Enablement Study. So the general trend is that this is a

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growing function within sales organizations. Further supporting our conclusion that this is a growing trend, budgets for the sales enablement function increased as well, with 21.0% of the respondents sharing that their budget was more than \$500K per year compared to 16.1% a year ago.

Priority Setting

This year's survey included questions to help us gauge the enablement maturity within a company. One of those was to examine how priorities are being set. The chart summarizes this year's responses.



Here, we see that this is still an emerging function within many companies; 54.2% said they set priorities on either an ad-hoc or informal basis. This is up from the 49.1% figure reported last year. We also saw a decline in the percentage of programs that had set priorities based on a formal sales enablement charter: 13.1% percent in 2017 compared to 15.3% in 2016. Both trends may be indicative of the significant increase in the overall number of the sales enablement functions and a case of new teams trying find their way as they set up their enablement function. We will be reviewing the impact that formalizing the sales enablement function can have on sales performance in more depth in Chapter 4.

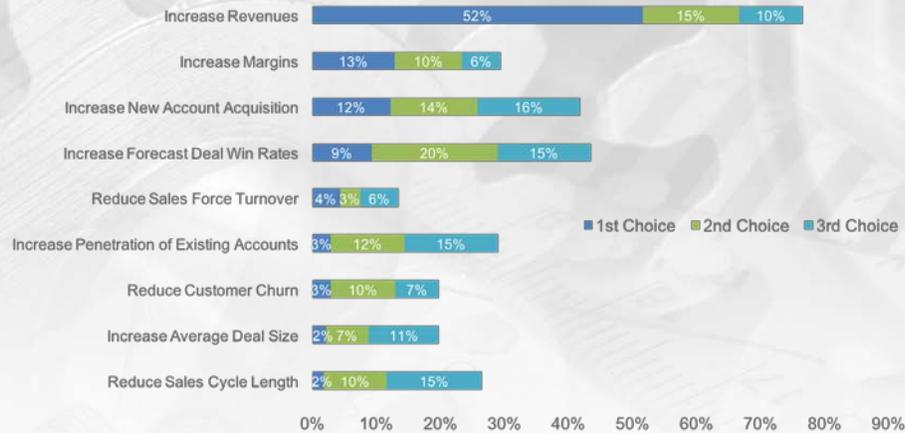
Performance Goals Review

We next examined what sales enablement teams are attempting to accomplish and how they plan to do it. We asked study participants to give us input on the top three sales performance improvements they were looking to achieve and then the top three productivity goals they were focusing on to make those improvements happen.

Looking first at sales performance goals, we see a high degree of consistency between what companies were trying to achieve in 2017 compared to the 2016 study findings. More revenues, higher win rates, more new accounts, deeper penetration into existing accounts and higher margins all continue to be top of mind.

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Top Sales Performance Improvement Goals



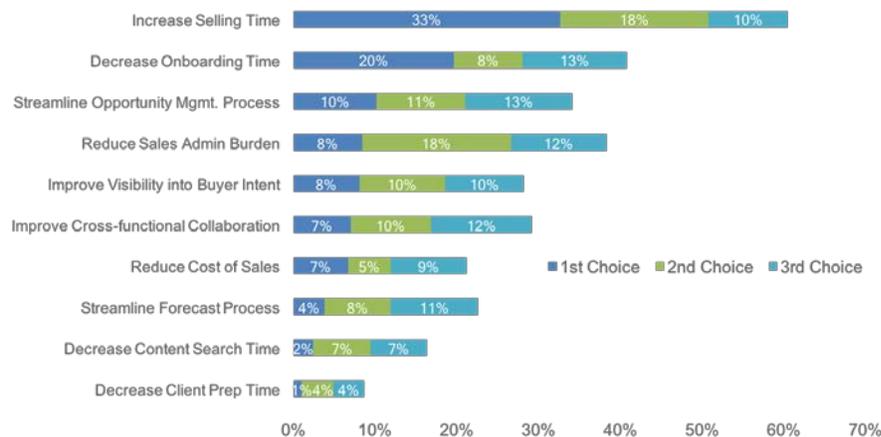
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During the past year, we have fielded numerous calls from advisory service clients asking for recommendations on how to convince senior sales management, and even executive management, to allocate more funding for sales enablement. Our top recommendation continues to be to *take the time to carefully calculate the impact of ultimately achieving sales performance goals.*

This goes beyond coming up with a new revenue number or margin percentage. Take it a step further and calculate what those improvements would mean to the owners of the company or to your stock price if your company is publicly traded. Optimizing shareholder value will be of keen interest to senior executives and can help you gain their buy-in.

Productivity Goals Review

Top Sales Productivity Goals



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Sales enablement’s top productivity goals for 2017 are summarized in the chart below. As mentioned above, productivity goals should be defined in the context of performance goals, focusing on the goals that are closely connected to the key performance goals. While increasing

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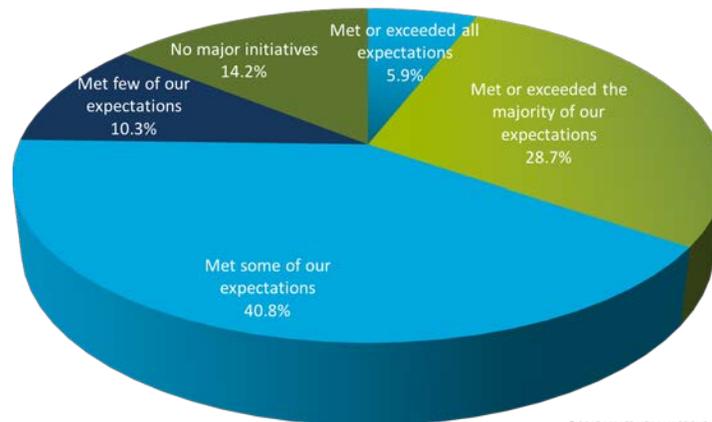
selling time is a logical objective, it is only half of the equation. If we only improve salesperson efficiency, we are helping our *average* salespeople to go out and make more *average* sales calls.

Another issue that needs more attention is forecast management, which is now in eighth place on this year's list. Forecast management is typically assigned to sales operations, with sales force enablement providing services that reinforce that process. However, the focus on *streamlining* the process misses the key point. Forecast management, in its present form, is a broken process in many organizations. There is no point in streamlining a process for getting to a number in which very few companies have any real confidence. Instead, sales force enablement and sales operations should use analytics and artificial intelligence (AI) to create a new and more effective way to assess opportunities.

Outcome of Enablement Initiatives

So now that we have reviewed what sales enablement is trying to achieve and which levers they plan to use, let's review how successful sales organizations are at making things happen. We asked the study participants to reflect back on the sales effectiveness initiatives they have fully implemented over the past two years and assess the results they achieved versus initial expectations.

Outcome of Sales Enablement Initiatives Over Past Two Years



In the chart, we see that 34.6% of firms felt they were achieving a majority or all of their expectations. This is up slightly from the figure of 31.3% reported last year.

The chart raises the question, "Does it matter if you achieve the majority or just some of your sales enablement objectives?" To find an answer, we segmented the study data based on sales enablement success assessment and then looked at performance differences in each segment.

In doing this analysis, one metric surfaced that deserves close attention. When sales enablement initiatives hit their mark, we would expect salespeople to be effectively leveraging the right processes and the right messaging to engage the right stakeholders in the right accounts. In short, we would expect to see better results, and that is exactly what our 2017 study showed.

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The chart shows the differences in win rates of forecast deals compared to how successful enablement initiatives were at achieving their objectives.

Clearly, achieving some objectives generates better results than achieving only a few. But, if you stop there, you will still be generating sub-par results compared to sales organizations that achieve the majority or all of their goals.

In the rest of this report, we explore key areas that can impact the success of sales enablement functions and programs. We hope the insights shared will help you more effectively optimize sales performance within your firm.

As always, advisory services clients are encouraged to contact their CSO Insights analyst to discuss any questions they may have on the content or to discuss the specific course of action their company should take to get the best ROI possible out of their sales enablement investments.



Chapter 2: The Lens We Use: The Enablement Clarity Model

Ever since we started tracking the emergence of sales enablement, we've noticed a lack of cohesion on what exactly people mean when they use the term. This year, we've refined our CSO Insights definition based on our research and our experience working with clients. We have summarized enablement services and focused on what they need to be: consistent for salespeople and scalable from an organizational point of view. And the customer's journey as design point is expressed by a revisited target audience: customer-facing professionals and their managers. This is also the reason why we call it sales force enablement. At the end, we have skipped "powered by technology" because it's obvious that every single enablement service is based on some kind of technology. Instead, we wanted to focus on what really matters: to add value in every customer interaction.

*Sales Force Enablement — A strategic, collaborative discipline
designed to increase predictable sales results
by providing consistent, scalable enablement services
that allow customer-facing professionals and their managers
to add value in every customer interaction.*

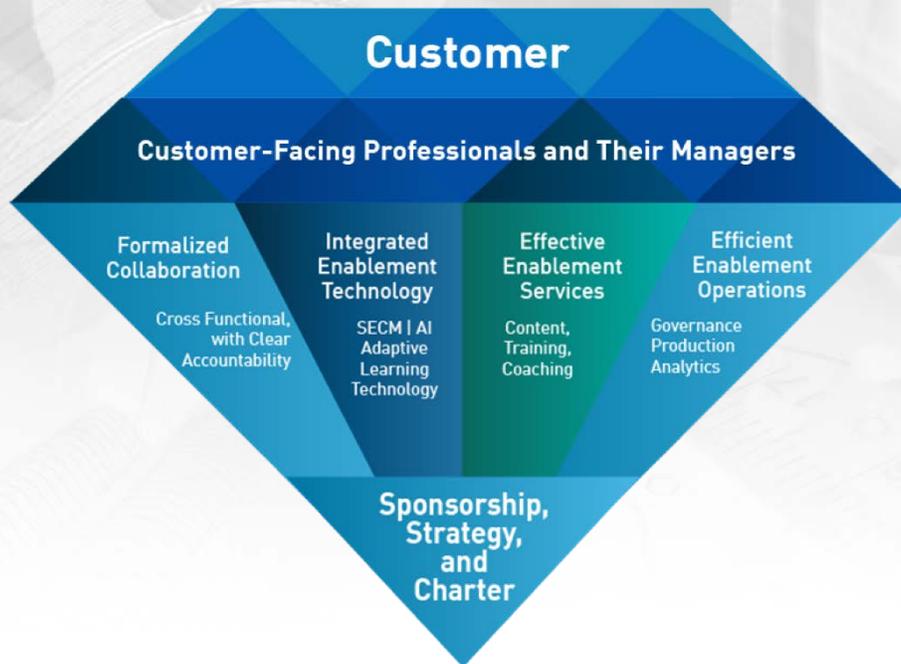
This definition serves as a frame of reference and expresses what you should be doing, based on our research. It gives all stakeholders a common understanding of what a sales enablement discipline is and helps make enablement discussions more productive. However, neither our definition nor any other is a sufficient guide for creating an enablement practice that allows you to achieve your desired results.

We still need clarity on how enablement achieves its goals and how the different facets of enablement work together to form a greater whole. Without clarity, everyone does their own thing, vital areas are overlooked and the initiative's outcomes fall far short of expectations.

Furthermore, this definition describes the desired end-state of sales enablement. If your current efforts have been ad hoc or informal, it will take time and effort to reach this level of enablement. The Sales Force Enablement Clarity Model, which we will review next, builds on the definition and serves as a guide as you assemble your sales enablement discipline step by step.

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The Sales Force Enablement Clarity Model



The clarity model shows each of the different facets of enablement that must be addressed to create an effective discipline. The position of these facets in the model is important as it illustrates how they work together. Using this model as a guide, enablement leaders can assess how they are doing in each facet and make better decisions about how to improve their efforts for better results.

Unless your enablement discipline is already mature, be careful not to address too many facets at once. For example, if you're just starting out, get your strategy and charter in order and build executive sponsorship before you start creating services. Wherever you choose to begin, getting to the next level is easier if you keep the holistic vision of the model in mind.

We'll start with a quick description of each of the facets. Then, in the chapters that follow, we will use the clarity model as our guide to the highlights of our 2017 research.

Customers – Customers don't immediately notice how perfectly you execute your sales methodology, how flawless your content is or how well-trained your salespeople are. The first thing they will notice (and sometimes the only thing) is how well your sales team understands them: their roles, their challenges, their industry and what they want to achieve.

For that reason, **customers** are at the top of our clarity model and must be reflected in every enablement service you provide and in every process you set up to create these enablement services. In the age of the customer, your sales force can only be successful working with the customers based on how customers perceive the world, because customers still make the most important decisions: the buying decisions.

Customer-Facing Professionals and Their Managers – While alignment to customers takes the top facet in our clarity model, your sales force enablement practice has internal customers, your target audiences. These target audiences include not only salespeople, but also those roles that

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are focused on business and sales development as well as the roles that are focused on serving customers after a deal has been closed. Furthermore, we know from our customers, our own experience and our research that reinforcement and adoption of enablement services can only be achieved if sales managers lead and coach their sales teams accordingly. This is the main reason we call it sales *force* enablement in our definition.

Sponsorship, Strategy and Charter – Next, we'll drop down to the bottom of our clarity model and look at its foundation. You'll need to create a strategy that supports the organization's go-to-customer strategy and business objectives. But, even the best sales force enablement initiatives fail if the team does not have enough authority to make things happen or lacks buy-in from senior executives. The key to success when creating your enablement charter is to liaise with those senior executives who have a long-term, strategic perspective.

Next, in the middle of our model are four facets that cover enablement services, collaboration, technology and operations. While the top and bottom facets cover strategy and approach, these facets address the inner mechanics of the sales force enablement discipline.

Effective Enablement Services – We put effective enablement services in green because these are the services that allow the organization to reach its desired results. If you think about the sales force as your internal customer, this is the only facet they see. If someone outside the organization were to ask your customer-facing professionals what sales enablement does, it's likely that they would talk about these main services (content, training, coaching).

The remaining three facets focus on the mechanics necessary to design, produce and deliver these services as well as manage the discipline. When we talk about moving from an ad hoc discipline to one that is more formal we are often focusing on these facets. They are essential to the stability and scalability of your efforts.

Formalized Collaboration – One of the reasons we call sales force enablement a discipline and not a department is because no one team can cover it all. Sales force enablement professionals orchestrate the process of creating and providing enablement services across many other functions within the organization.

Integrated Enablement Technology – There is a wide range of enablement technologies available on the market, so it's no longer just about Sales Enablement Content Management (SECM) solutions. Learning, training, coaching and analytics technologies, ideally integrated into your CRM system, all contribute to your enablement efforts. In this report, we will look at the latest trends regarding scope, adoption and integration of enablement technologies.

Efficient Enablement Operations – Enablement operations is often seen as a "black box" because it includes the behind-the-scenes functions of enablement, but this is where all the enablement magic happens. As it is poorly understood, it is also a facet that is easily overlooked. To ensure you don't fall into that trap, we will discuss the components of enablement operations and what our data says.

Now, let's discover what our research has to say about each facet of the clarity model!



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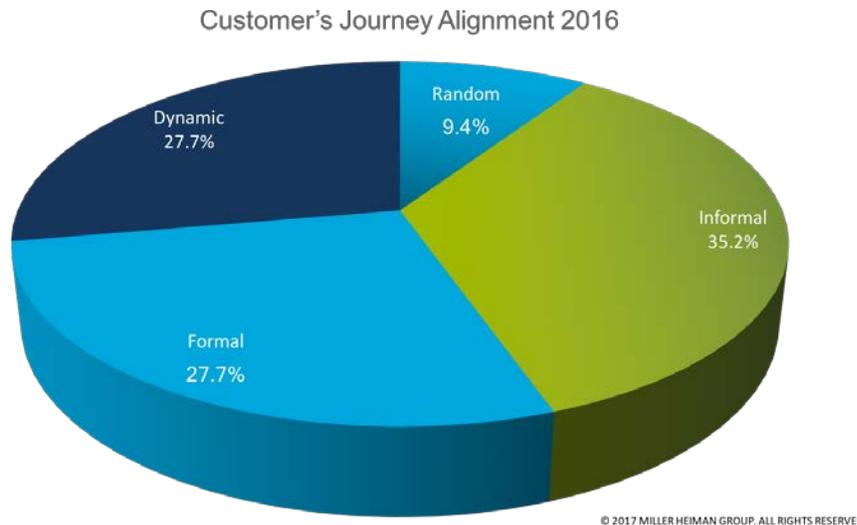
Chapter 3: Beginning with the End in Mind: The Customers

Your customers should always be at the core of your enablement efforts. The reason is simple: buyers make buying decisions. These buying decisions have the greatest impact on results, but they are not within the sales organization's control. Of course, sales professionals do whatever they can to influence this decision, and sales enablement can help by equipping the sales force to be relevant, valuable and differentiating in every customer interaction. But, that still doesn't change the fact that buying decisions are made by buyers.

Addressing selling challenges in the context of the customer's journey

Making the customers the core design point for sales force enablement does not mean that the sales force's particular challenges are not important. Not at all. However, they have to be addressed based on the customer's preferences for how to connect and engage with salespeople, how to buy and how to implement products and solutions. The reason for this is also straightforward: You need to make your sales force effective along the entire customer's journey so that they can influence the buying decision right from the start. Creating an enablement strategy that considers the customer at the core and the specific challenges of your sales force is why a formal approach to sales force enablement and a formal charter are so necessary. (See chapter 4)

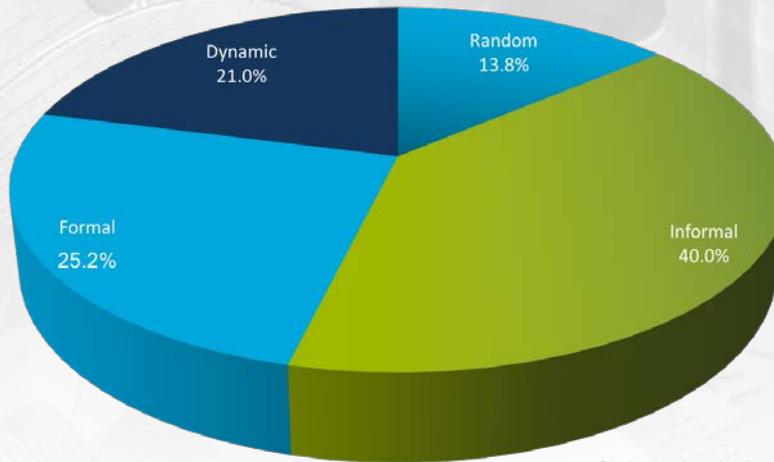
Aligning the internal processes to the customer's journey is a critical success factor



In last year's study, we looked at how organizations approach the alignment of their internal processes to the customer's journey. It was interesting to see that 44.6% had not purposefully aligned their sales process to the customer's journey, but the majority (55.4%) reported a formal or even a dynamic alignment. A dynamic alignment is characterized by the formal mapping of internal processes to the customer's journey along with an ongoing review and feedback mechanism leveraging sales analytics for quickly adjusting to changes. In last year's report, only dynamic alignment had a significant impact on win rates for forecast deals and quota attainment.

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Customer's Journey Alignment 2017*



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*CSO Insights 2017 World-Class Sales Practices Report

We included this question in our *2017 World-Class Sales Practices Study* to get more feedback on this critical issue from the more than 1,800 global study participants. This data shows that the majority (53.8%) had a random or informal alignment of their sales process to the customer's journey, whereas 46.2% reported having a formal or dynamic alignment. Alignment seems to be challenging for the overall audience, while the participants of our enablement studies reported being a bit more effective in this area.

Study results: Only dynamic alignment improves quota attainment and win rates

Last year's data showed a 13.6% improvement in quota attainment (compared to the 2016 study's average quota attainment of 55.8%.) based on dynamic alignment. This year, the results from our much broader *World-Class Sales Practices Study*, show a 13.5% quota attainment improvement—virtually the same result.

Furthermore, last year's enablement study showed an improvement of 15.0% in win rates for forecast deals with dynamic alignment. This year, the results from the *World-Class Practices Study* show that win rates for forecast deals can be improved by 10.1%, compared to the study's average win rate of 51.8%). While there is a difference, both results show a double-digit improvement that cannot be ignored.

Key Takeaways

There are two clear takeaways from last year's *Sales Enablement Optimization Study* and this year's *World-Class Sales Practices Study* regarding enablement:

- First, the enablement audience seems to be a bit more advanced when it comes to aligning internal processes to the customer's journey than the broader audience of the *World-Class Sales Practices Study*. This may be because enablement teams are more aware of the need and a bit ahead of the game. Nevertheless, achieving dynamic customer's journey alignment remains a challenge for more than 70% of today's sales organizations.

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- Second, dynamic alignment is mandatory. The results of both studies plainly show that significant performance improvements can only be achieved with a dynamic customer's journey alignment.

Dynamic alignment of enablement to the customer's journey is essential to producing high-quality quality, effective sales enablement services. If there is no clarity as to how internal processes are mapped and aligned to the customer's journey, contributors to your enablement efforts work in a vacuum. We'll discuss this in greater detail in Chapter 5 where we discuss the effectiveness of content services.

Related CSO Insights research content:

- [Customer's Journey Alignment Drives Performance – If Done The Right Way](#)

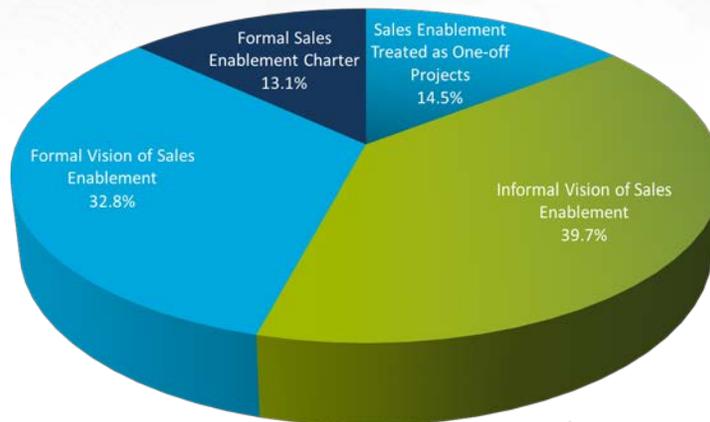


Chapter 4: Creating an Enablement Charter Pays Off

We have long been advocates of the sales enablement charter. Not only is the charter itself a living document that you will refer to help you stay the course and overcome any obstacles, but the process of creating your charter can also be highly beneficial. If you do not take the time to determine the specific challenges your sales organization faces and why those problems exist, you will be hard-pressed to implement sales enablement initiatives that will successfully optimize the performance of your sales organization.

Before we get into how to do that, let us present data that shows why this is a must-do task. In Chapter 1, we discussed the approaches companies took to setting sales enablement priorities. To save you the time flipping back to that section, we've included the chart of those results again.

Setting of Sales Enablement Priorities

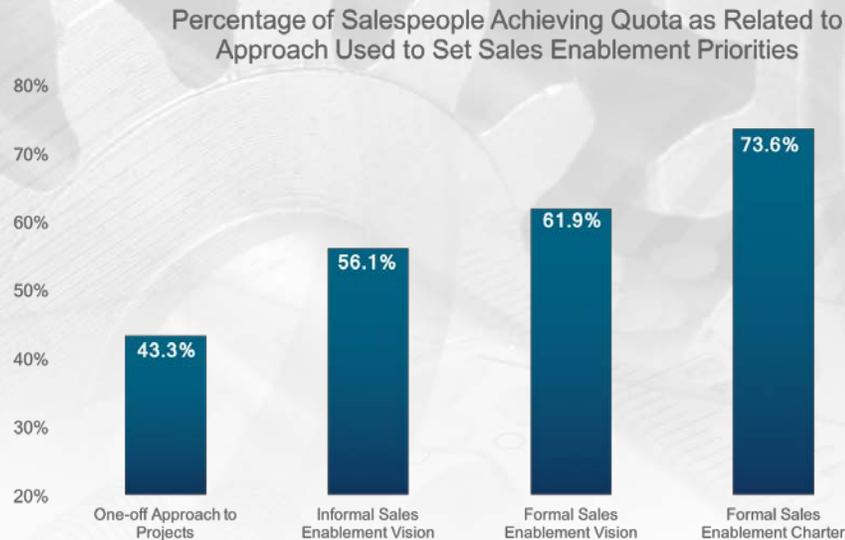


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Determine the Payback for Proper Planning

Using this metric to segment the 2017 study data, we then searched for any sales performance difference. One of the tests to determine the effectiveness of sales enablement initiatives must be “Did our salespeople succeed in attaining their revenue targets or not?”

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The chart summarizes what we found when we conducted that analysis. The image paints a very clear picture. As you move up the sales enablement planning rigor hierarchy, your organization's ability to successfully improve your salespeople's performance increases at each step. Yes, we know this takes an investment, but the value of creating a formal enablement charter is indisputable: it is 27.6% improvement compared to the study's average quota attainment of 57.7%.

Enablement Charter Starting Point

View your charter as your "business plan." It would be foolish to try to run a company without a formal plan, and the same logic applies to establishing and managing a sales enablement discipline.

The creation process starts with a discussion with executive leadership. Your planning should revolve around ensuring that your company achieves key business goals. Is the company focused on revenue growth, margin improvement, increasing market share, penetrating new markets, minimizing customer churn, etc.? You should come away from this part of the analysis with a definitive understanding of what the end goals are.

Collaborating Across the Enterprise

The next set of inputs comes from determining what needs to change for your sales organization to achieve those goals. This is not a "sales-only" discussion. As we will see in Chapter 8, enablement relies on effective collaboration across the enterprise to succeed. So, you need to meet with other functional areas such as marketing, customer service, finance, product development, manufacturing, legal, human resources, IT, etc.

These need to be bi-directional conversations, where you share and analyze what sales and the other functional areas are planning to do. Here you are looking for initially looking for opportunities for teams to work more collaboratively to achieve common goals. You are also looking to surface things that could be potential landmines. The sooner you uncover these "surprises," the sooner you can act to minimize them and any problems they might create.

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Doing your homework up front then sets the stage for a concise, well-understood enablement charter and leads to the next step – defining what *could* be done and then determining what *will* be done. During your analysis, you may surface dozens of sales challenges that are candidates to be addressed. But remember, enablement is not about getting a little better at everything; it's about becoming great at a few important things. So, after you identify all the projects that you might want to consider, do a second analysis to determine what the impact would be if you successfully addressed a given issue. Then, honestly assess your organization's ability to take on that initiative. Start with initiatives that have high impact and high probability for success.

C-Suite Buy-in, and More

Once you have gone this far, go back to the C-Suite and share your findings. You need three things from them: 1) signoff on what you want to accomplish; 2) the authority to make it happen; 3) agreement on who within the C-Suite is going to be the champion for sales enablement. When someone needs to break the tie between what you want to do and what other functional areas are willing to do, who is that executive?

Now you are ready to turn your goals into a formal charter. This initially needs to include considering three factors: business strategy, sales strategy and the current state of sales execution. But, this is also the time to consider your current state of enablement maturity. To support this, refer to the discussion on the Enablement Clarity Model in Chapter 2 and our recommendations in Chapter 9. These four factors will ultimately affect what your enablement charter looks like.

Creating an enablement charter is a lot of work, but it is not optional. The differences in performance seen on the previous page make it clear that the cost of skipping this step or not being comprehensive enough will potentially cost your company orders of magnitude more than doing it right from the beginning.

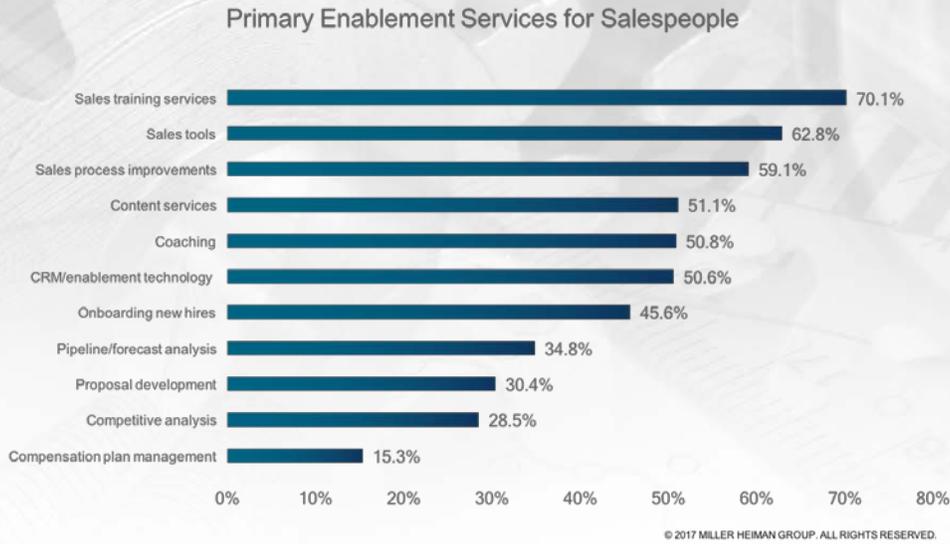
Related CSO Insights Research Content:

- [Do You Need An Enablement Charter?](#)
- [Creating a Sales Force Enablement Charter \(requires membership\)](#)



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Chapter 5: Enablement Services Effectiveness Analysis



Enablement services are what your enablement customers, the salespeople, see from your enablement team. For the third year in a row, sales training services are the primary enablement service offered to salespeople (70.1%), followed by sales tools (62.8%) and sales process improvements (59.1%). Sales process improvements, ranked year over year as a top priority, are based on a close collaboration with sales operations. We have addressed the latest findings on sales process improvements in great detail in our *2017 World-Class Sales Practices Study*.

In this chapter, we will discuss sales training services and sales content services. Coaching services for sales managers are discussed in Chapter 6.

This year, content is becoming more relevant and is now in the fourth position (51.1%). We'll take a closer look at content's rise later in this chapter.

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Overall training effectiveness has increased, but customer-centered training services still need redesign or improvement



The overall effectiveness of training services has improved compared to the last two years, but a general truth remains: Training services that have to be designed around the customer are less effective than training services that are centered around internal topics such as products, process, methodology or CRM.

Over the last two years, the most ineffective training services had an aggregated need of major redesign and improvement of more than 70%. In both 2015 and 2016, social selling topped this list. That has changed in 2017. The training service that shows the biggest aggregated need for major redesign and improvement is ROI/business value justification training (56.6%), followed by social selling, and customer's journey/customer knowledge training. All the three show very similar results. We'll take a closer look at social selling training services in our Chapter 7 spotlight.

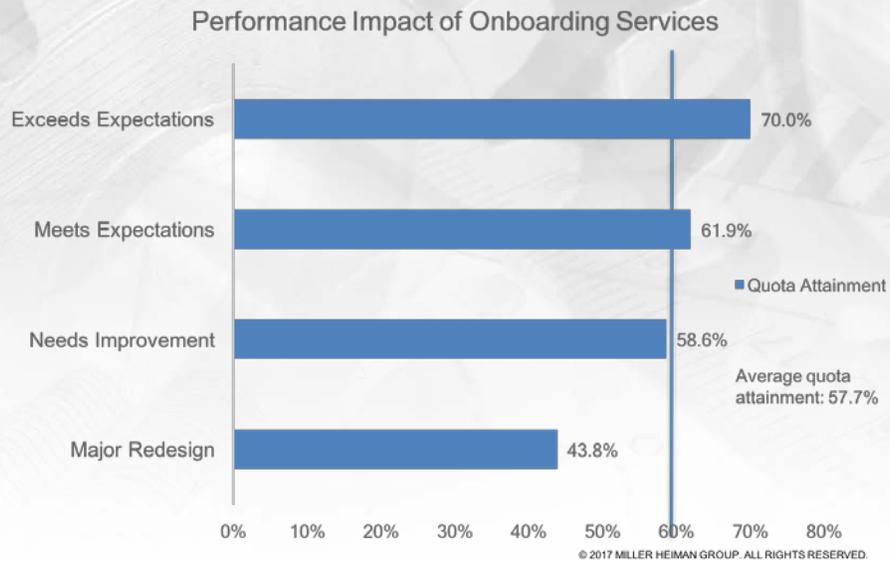
The more effective the training service is ranked, the better the performance metrics

We are analyzing how training services are assessed on an annual basis, because the quality and effectiveness of a training service have always had a significant impact on performance. Let's first look at two fundamental training services: onboarding and methodology/process training. In both cases, when the training service is ranked "needs major redesign," quota attainment is far below the average of the study.



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Example 1: Onboarding services show potential to improve quota attainment by 21.3%

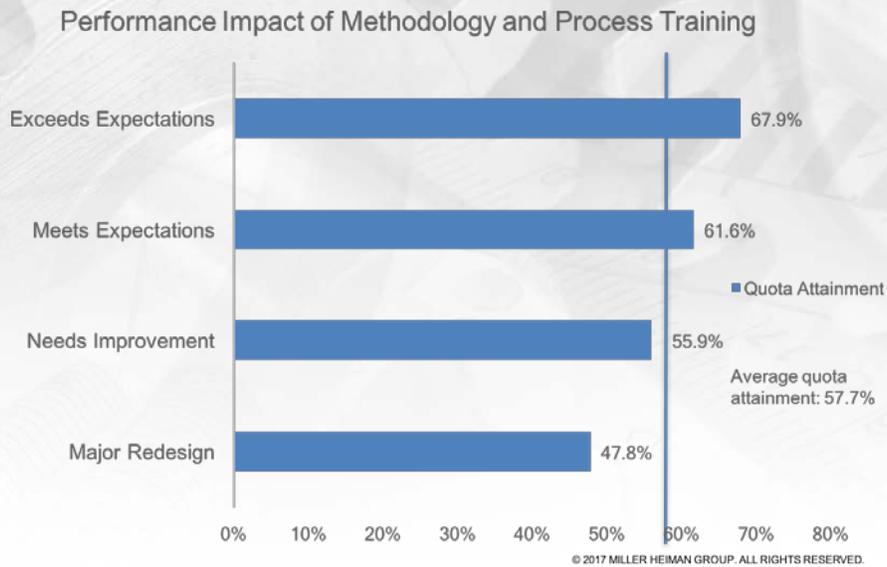


Onboarding services are among the most crucial training services, especially for fast-growing organizations. If your onboarding services need major redesign, you will end up far below average performance of 57.7% in this case. Onboarding services that just need improvement will help you raise performance to better than average. Only with onboarding services that meet or exceed expectations can you achieve much better than average performance. Quota attainment of 61.9% (meets expectations) or even 70.0% (exceeds expectations) can have a significant impact on the business case for new hires and your financial performance in the related fiscal year.

For fast-growing organizations, there is a far greater focus on hiring than in sales organizations operating in saturated markets. That means onboarding is of particular relevance in these organizations, and a short ramp-up time to full productivity becomes the main goal of every onboarding program.

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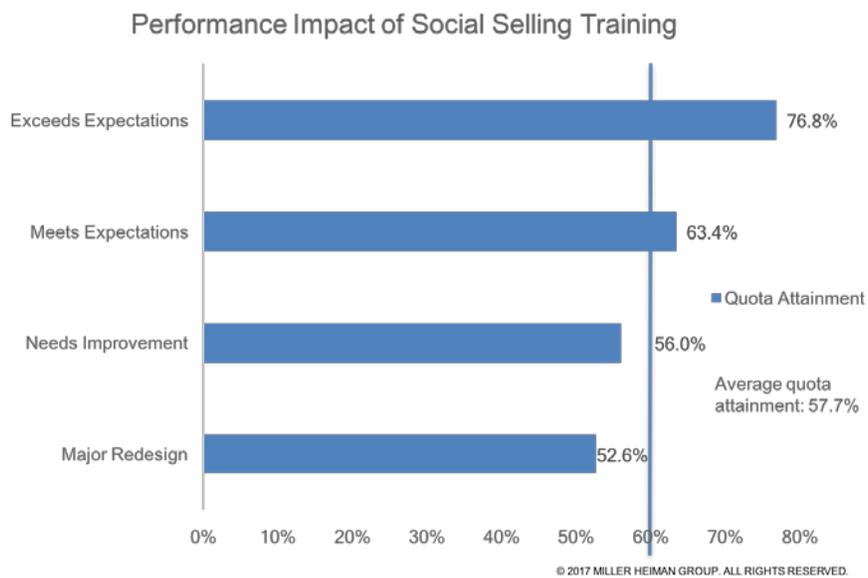
Example 2: Methodology/process training shows a potential of 17.7% better quota attainment



Scalable approaches to selling can only be achieved with a sales process that is well aligned to the customer's path and reflects the context of the business and how buyers in this industry want to buy.

Getting everyone on the same page, and achieving an effective and scalable approach to selling, is the goal of methodology and process training services. It's a foundational layer of training services to which other services, such as value messaging, social selling, or customer's journey training, can be connected.

Example 3: Social Selling shows a potential of 33% better quota attainment



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Social selling training services can only be effective if they are connected to the fundamentals of the sales organization. The data in this study and in our *Sales Best Practices Studies* from 2013 to 2016 support this conclusion. Connecting to the fundamentals means that the organization's approach to social selling and its methodologies are integrated into the existing sales methodologies and processes. Therefore, effective social selling training services must never focus on technology alone. They also need to help sales professionals develop new skills and integrate them into their daily workflows.

When social selling training services exceed expectations, quota attainment reaches 76.8%, which is a difference of 19.1 percentage points and an actual improvement of 33% compared to the average quota attainment of 57.7%. It's worth noting that this finding represents the single largest performance impact in this study.

The key takeaway from these examples is that organizations with low-quality training services risk achieving even lower-than-average performance. Sales and sales enablement leaders who are focused on building World-Class sales organizations must invest in the quality of their training services to effectively build the capabilities that are needed to achieve World-Class performance.

Content salespeople need comes from various teams

Content means different things to different people. At CSO Insights, we look at content as customer-facing content, internal enablement content such as playbooks and guidelines, and training content that serves as the foundation of training services. But, content doesn't always fit neatly into these categories. For example, content is also one of the foundational elements for sales tools such as business value/ROI tools. With many of these tools being offered electronically, where does content end and the tool begin? As Jim Burns, president of Avitage, has said, *"Content is a concept. I'm finding 'situation-ready content' clarifies for everyone. It focuses everyone on the right question – content for what purpose, for what situation."*

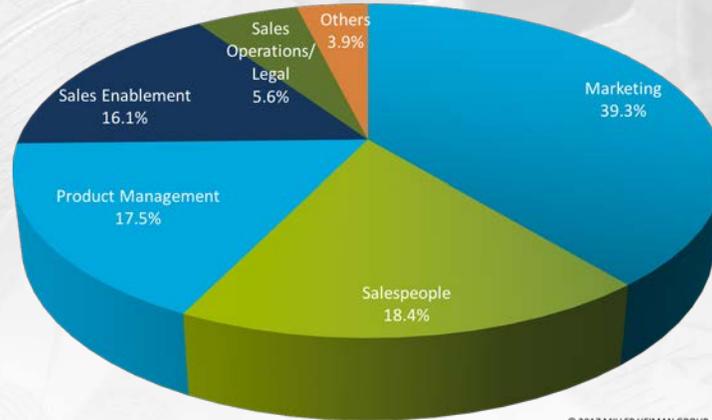
Earlier we noted that content had risen to fourth position in the chart of primary enablement services provided. Given enablement's accountability for the breadth of content types (regardless of who creates them) fourth position doesn't quite capture its importance. The fourth position is a reflection of the fact that enablement is usually only held accountable for a portion of the content needed.

In 2016, we analyzed, for the first time, who creates the content salespeople need along the entire customer's path. The results were surprising for many of our readers: marketing only created 39.0% of the content salespeople need. There was still a large percentage of salespeople creating (not just customizing) their own content (24.2%). Other teams who created content included product management (14.8%), sales enablement (11.9%) and operations/legal (6.6%).



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Who Creates The Content Salespeople Need?



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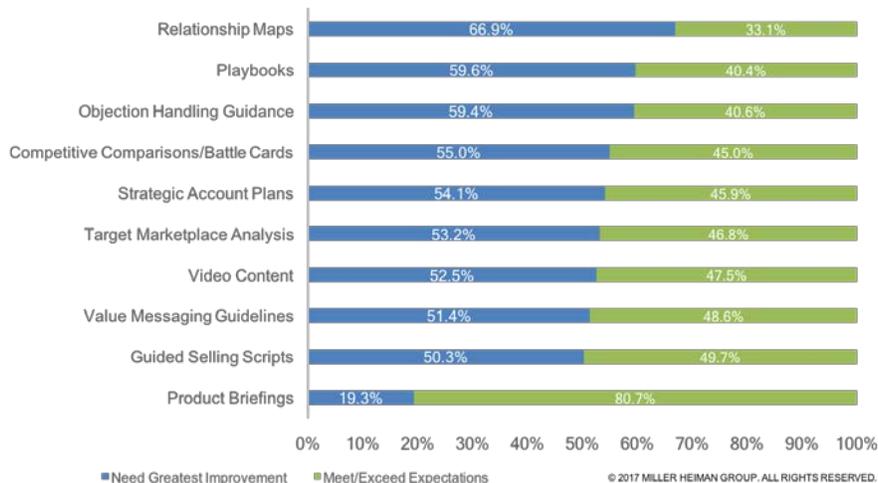
This year, we asked the same question again, and the results are very similar. For marketing, the result is almost the same (39.3%). The good news is that the percentage of salespeople who create their own content decreased to 18.4%. The other good news is that the contribution from the subject matter experts in product management slightly increased.

The role of sales force enablement has expanded as well. When it comes to content, sales enablement teams do more than just orchestrate the cross-functional efforts of content contributors. They are also in the unique position to know how and what types of content add value for salespeople and managers, so they are often the best team to assemble internal enablement content such as playbooks and value messaging guidelines.

Customer-facing content assessment confirms trend over the last three years

Assessing the quality and effectiveness of content is not as simple as it may sound. When it comes to customer-facing content, you should always ensure that you get direct feedback from your customers regarding relevance and value. Don't rely only on internal feedback because you may not always see the bigger picture.

Internal Enablement Content Assessment



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As with training services, content services designed around the customers' needs, perspectives and challenges show the biggest need for improvement. Content types devoted to products and internal processes are more likely to meet or even exceed expectations. This data point shows results similar to those for the last two years, including the fact that product collateral and technical presentations are ranked the highest in meeting or exceeding expectations.

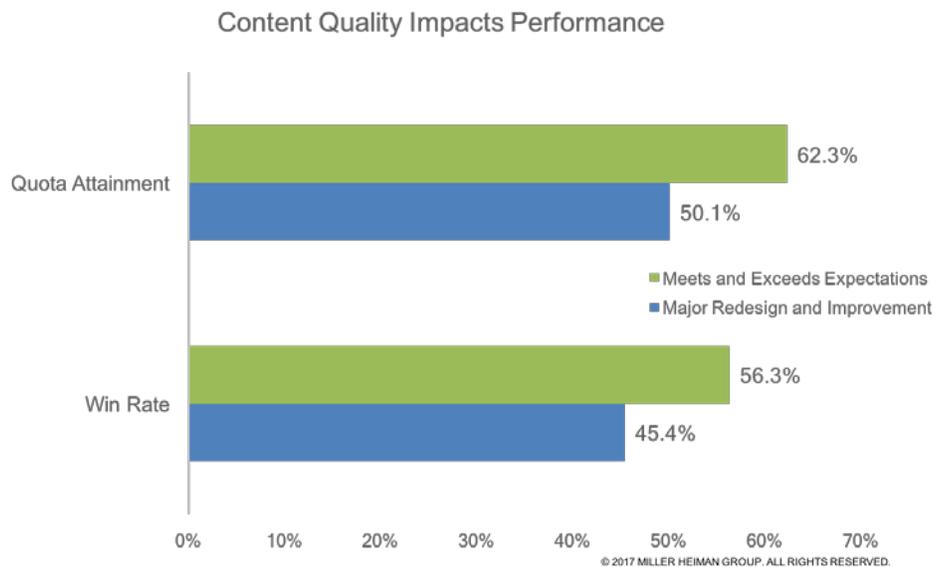
Internal enablement content assessment: product briefings are ranked most successful

When we look at the results for internal enablement content, product-centered content is again ranked as meeting or exceeding expectations. Everything else is ranked somewhere in the middle, with little differentiation between types.

Once again, playbooks continue to need improvements, just as they have over the last two years. One of the challenges may be that "playbook" means different things to different people. In the market, we see many different assets that are called playbooks. Some are "old-fashioned" playbooks that come as big PDF documents. Others are highly interactive, digital documents that guide salespeople to the details they need. We also see playbooks that are automatically created on demand specifically for the attributes of the opportunity that has just been created in the CRM system. To drive playbook effectiveness, sales enablement should strive for clarity on the term before discussing how to leverage technology to deliver these important content assets.

Content quality drives quota attainment and win rates for forecast deals

The previous chart showed quality ratings for customer-facing content and internal enablement content. Let's turn now to how content quality impacts performance. In the 2017 study, we looked at the correlation to quota attainment and win rates for forecast deals.



The study's average quota attainment is 57.7%. The chart shows that low-quality content gets in the way of even average quota attainment. Conversely, good or excellent content quality can help sales forces achieve a quota attainment of 62.3%, which is an improvement of 7.9%

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compared to average performance. The impact of content quality on win rate for forecast deals is similar.

This year's analysis of content services signifies an important trend: Content quality has a high correlation to sales performance. The dynamic customer's journey alignment we discussed in Chapter 3 is a prerequisite for creating high-quality, effective content. Research members can get in touch with their CSO Insights analysts to learn more about frameworks for how to assess, design and create content for the different customer journey phases.

Related CSO Insights Research Content:

- [Enablement builds it, but do salespeople use it?](#)
- [The Content Dimension of Sales Enablement: Marketing is only part of the story](#)
- [Why consistency matters to achieve sales force enablement results](#)



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Chapter 6: Driving Adoption and Reinforcement Through Sales Coaching

Coaching is a leadership skill based on structured conversations and used to develop each salesperson's full potential. However, in many organizations, coaching is reduced to opportunity coaching only. Opportunity coaching is important, but insufficient by itself. For your reference, we have defined five coaching areas: lead and opportunity coaching, funnel coaching, skills and behavior coaching, account coaching and territory coaching.

Sales coaching is a highly effective way to drive adoption and reinforcement of enablement services, but for enablement to leverage sales managers as coaches requires two things to happen. First, sales managers have to be an enablement target audience. This should be addressed in your charter. Second, to make sales coaching effective, enablement leaders must develop and implement a coaching approach that consists of a formal or even dynamic coaching process, related training (coaching in general and on the coaching process itself) and content services such as coaching guidelines. A “formal” coaching process is one that is defined and implemented, and sales managers are required to use it. “Dynamic” goes a step further, and connects the coaching process to the enablement framework, and managers are measured by their coaching impact.

Organizations begin to formalize their coaching approaches

Let's first look at our study participants' approach to sales coaching. For years, around 50% of respondents to our studies have reported that they left coaching up to their managers. Finally, this year, we've seen a strong uptick in formalized coaching.



In 2017, only 34.7% of our study participants reported leaving coaching up to their managers as compared to 47.5% last year. Most of these organizations have an informal coaching approach, but a few have applied a formal or dynamic approach to coaching.

Sales coaching impact is predominantly measured by lagging indicators

Before we look at the impact of coaching approaches on sales performance, let's have a look as to how organizations measure sales coaching impact. The three most important metrics

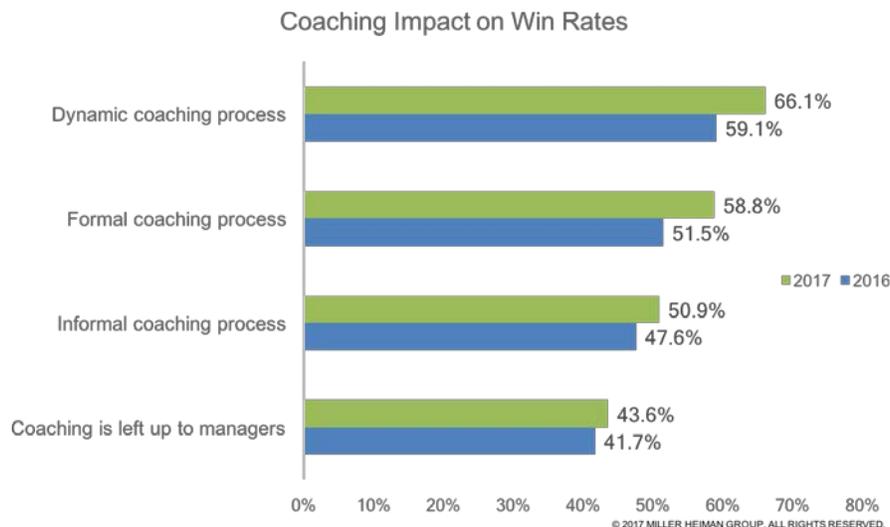
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organizations use to measure coaching impact are quota attainment, win rate for forecast deals and revenue plan attainment. These are lagging indicators, meaning that they measure performance that has already happened. Sales coaching impact can also be measured using leading indicators that indicate the potential for future performance. Examples of these metrics include conversion rates, customer retention, average deal size and average sales cycle length. When leading indicators rise, lagging indicators of performance typically rise as well.

Sales coaching improves customer relationship levels

As we mentioned in Chapter 1, three-quarters of our study participants reported having a preferred supplier, solution consultant or strategic contributor relationship with their customers. Organizations that leave coaching up to managers (random approach) have almost 80% of their relationships in the three lowest levels: approved supplier, preferred supplier and solution consultant. Organizations with a formal or dynamic coaching approach have almost three-quarters of their relationships in the three highest levels: solutions consultant, strategic contributor and trusted partner. Improving the level of relationship isn't a goal for its own sake. Instead, it is a means to an end, to achieve better sales results. You can check out our 2017 World-Class Sales Practices Study to see the performance impact higher-level relationships, combined with formal or dynamic sales processes, can have on metrics such as win rates and quota attainment.

Dynamic coaching delivers the most significant performance impact: a 27.6% improvement in win rates.



The average win rate in our 2017 study is 51.8%. As with last year's data, organizations with a random approach to coaching didn't even achieve average performance (43.6%), and an informal approach helped achieve slightly less than average performance (50.9%). Only formal and dynamic approaches to sales coaching led to a significant increase of win rates for forecast deals: 58.8% with a formal approach and 66.1% with a dynamic approach. In other words, a formal coaching process leads to a win rate improvement of 13.5%, and a dynamic coaching process can improve the same metric by 27.6%. Our 2017 results continue to show that establishing a dynamic coaching process is one of the most effective ways to impact performance.

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Investing in an integrated sales force enablement approach pays off. It requires enablement leaders to connect coaching frameworks to their enablement frameworks to ensure that they are set up to drive adoption and reinforcement. Additionally, it requires enablement leaders to develop and equip the sales managers at the frontline adequately, especially their coaching capabilities, to achieve performance improvements sought by sales leaders everywhere.

Related CSO Insights Research Content:

- [Sales Managers: Overwhelmed and Underdeveloped | Our First 2017 Sales Manager Enablement Report](#)
- [Coaching Isn't Just Coaching: Which Coaching Areas Have To Be Considered](#)
- [Why Effective Coaching Requires A Coaching Framework](#)



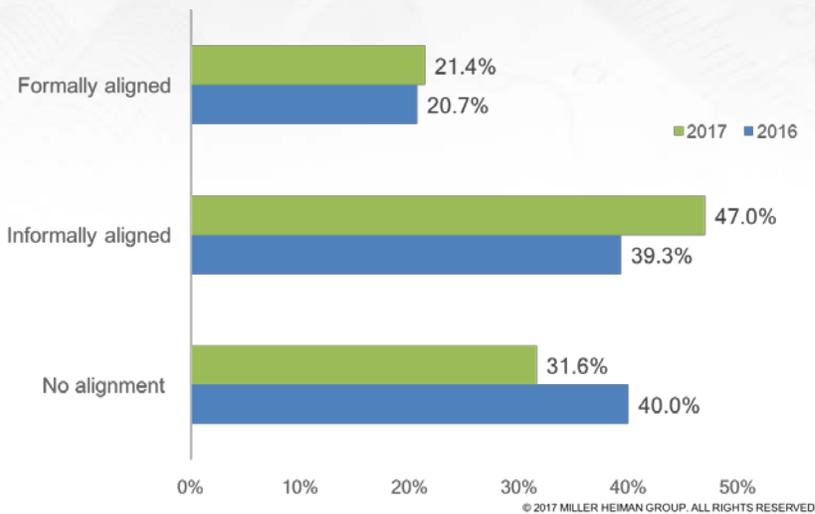
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Chapter 7: Spotlight: The State of Social Selling in Sales Force Enablement

Social selling has had a tremendous impact on the world of professional selling over the last couple of years. While we've looked at the impact of social selling on sales performance in many of our other studies, our 2016 enablement study marked the first time we researched social selling from an enablement perspective. With the 2017 study, we now have two years' worth of data. In this report, we will look at the most significant changes compared to last year and at the impact of social selling services on adoption and performance.

Aligned social strategies are the key success factor for social selling benefits, adoption and performance

Alignment of Social Strategies Between Marketing and Sales



Social media is used by both marketing and sales, so it makes sense to research the alignment of social strategies across both of these organizations. This year's data shows some good news as well as opportunities for improvement. The good news is that organizations are getting better at aligning their social strategies between marketing and sales: this year only 31.6% had no alignment, down from 40.0% last year. Looking at informal alignment, the trend is reversed with 39.3% informally aligned last year, jumping to 47% this year. The fact that the "no alignment" percentage has shrunk and the "informally aligned" percentage has grown suggests that many organizations have worked to evolve their social strategies. The percentage of those with formally aligned social strategies is almost unchanged: one-fifth of the study participants.

Aligned social strategies provide more clarity on the benefits of social selling

Last year, many organizations had challenges articulating the primary benefits of their social selling activities: 38.0% of all study participants were "not sure" about their primary social selling benefits. This year there is more clarity with only 32.0% saying they were "not sure." Having formally aligned social strategies between marketing and sales pays off, because it clarifies which social selling activities have the greatest impact and what the primary benefits are. In those with aligned strategies, clarity on social selling benefits is not an issue at all: only 16.3% responded with "not sure," which is about 50% greater than the response from all

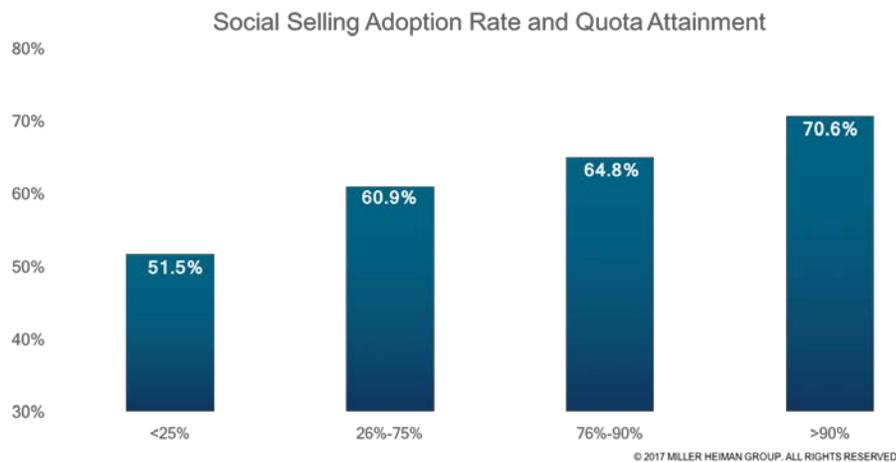
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participants. By far, the most important social selling benefit is the increased number of leads, followed by deeper relationships with customers, reduced research time and improved conversion rates.

Social selling adoption is an early indicator of sales results

Many CSO Insights studies have shown that adoption can make or break your implementation success. For instance, regardless of your sales process, the adoption rate of CRM or SECM is an early indicator of an initiative's chances of creating the desired business impact. If the adoption rate is too low, you can take action to change that. If your adoption rate is moving in the right direction, then the rhythm of your business dictates when your initiative will show measurable results. But, what does "too low" mean? Usually, we see an impact on performance, when adoption rates cross the 50% level. To achieve a significant performance boost, adoption rates have to be higher than 75%.

In this year's data, we can see that the alignment of social strategies drives social selling adoption. That makes a lot of sense. The process of aligning the social strategies of marketing and sales requires many conversations, followed by communication and implementation activities. All these activities improve clarity and adoption across the sales force. Across all study participants, social selling adoption is still a challenge. Only 12.9% reported having social selling adoption rates greater than 75%. But of those with fully aligned social strategies, almost one-quarter (22.7%) reported these high adoption rates.



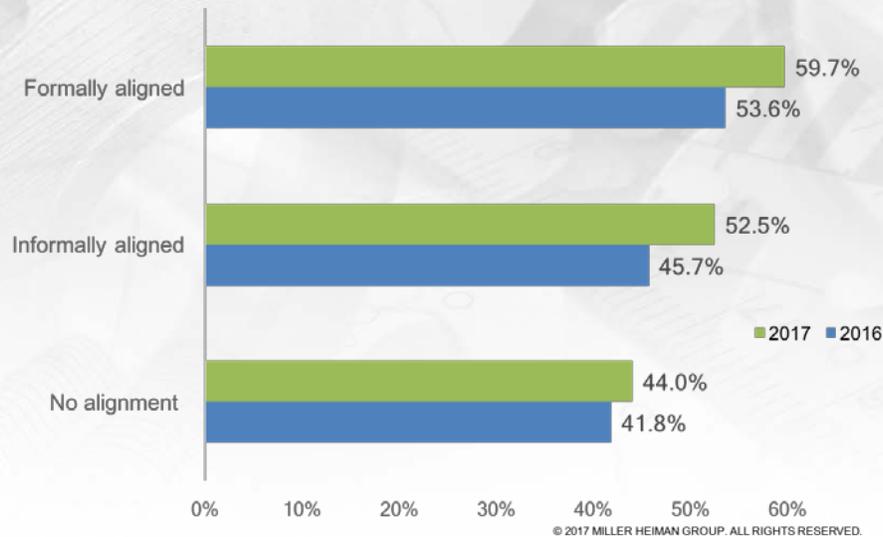
Higher adoption rates also lead to higher performance. You can see the impact on quota attainment in the chart. Remember that the study's average quota attainment is 57.7%. In organizations with low social selling adoption rates, sales teams don't even achieve average performance. There is also a broad middle range that delivers results slightly above average. And, as we said before, the real impact happens when adoption reaches above 75%. Quota attainment of 64.8% is an actual improvement of 12%, and an adoption rate greater than 90% leads to an improvement of 22%.



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Aligned social strategies drive sales performance

Alignment of Social Strategies and Impact on Win Rates



Finally, let's look at the performance impact of formally aligned social strategies. This is another question we've asked for two years in a row, so we can now compare results. This year, the impact of aligned social strategies between marketing and sales leads to an even bigger impact on performance, shown here as win rates for forecast deals. The data of both years clearly shows that no alignment is a recipe for sub-par performance. No alignment doesn't even lead to average win rate performance (the 2017 average is 51.8%, compared to 46.2% last year). Informally aligned strategies are a phase organizations have to go through until they achieve formal alignment with integrated campaigns, enablement services, social and enablement technology, etc. Once aligned, performance results in both years are above average. This year, there is an actual improvement of 15.2%. With these double-digit performance impacts, the question is no longer "do we need social selling?" The question is "How do we get it right?"

Social selling is not just an individual behavior. It requires a cross-functional approach that covers marketing and sales (and ideally also service) to achieve an integration of strategy, process and technology. Only then can social selling skills be developed, applied and reinforced successfully to create a significant impact on quota attainment and win rates.

Related CSO Insights Research Content:

- [Social Selling: The New Normal for World-Class Performers](#)
- [Social Selling Differences in the UK and the US: An Interview with Lee Bartlett, Part 1](#)
- [Social Selling Differences in the UK and the US: An Interview with Lee Bartlett, Part 2](#)

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Chapter 8: Three Essential Enablement Foundation Pillars

So far in this report, we have alluded to three key elements that sales enablement must successfully leverage to optimize the performance of the sales organization: formalized collaboration, integrated technology and enablement operations. We want to explore those areas more deeply here.

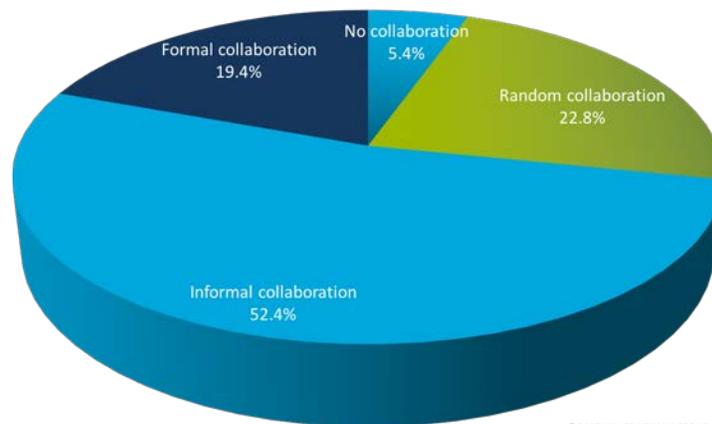
Approaches to collaboration: small steps in the right direction

We strongly recommend that sales force enablement take on the role of central coordinator, marshaling the resources needed to tackle critical sales challenges. When a sales challenge emerges, such as the need to increase revenues per salesperson, multiple functional areas in the company can be mobilized to help solve the problem. Sales management may decide it is time to revamp the account planning process. L&D could redesign the new salesperson onboarding process. Marketing could introduce new value messaging. IT could add new AI features to the CRM stack. Sales operations and/or finance could adjust the compensation plan. Almost every department has something to contribute.

No matter how well-intended these initiatives are, the result is often chaos for the sales force as they try to understand and absorb a barrage of random, uncoordinated and inconsistent changes to how they are expected to do business.

Sales enablement can bring order to the chaos by taking over the role of synchronizing and orchestrating these efforts. As part of the 2017 study, we asked the participants to share with us how cross-functional collaboration was currently handled in their company. The chart summarizes their responses.

Sales Enablement Collaboration Approach Across Company



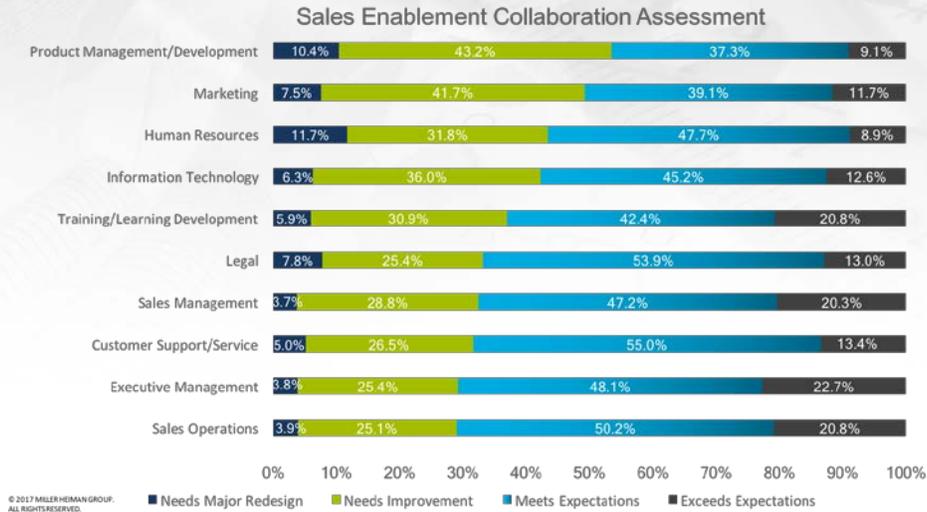
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On the positive side, we have seen a noticeable drop in organizations with no or random collaboration, from 36.7% in 2016 to 28.2% in this year's study. However, there has been no rise in the percentage of companies with a formal collaboration strategy, so there is still a lot of room for improvement.

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Collaboration becomes more effective

Drilling deeper into how effectively sales is collaborating with other functional areas within the enterprise, we were encouraged to find a marked improvement across the board. The chart summarizes the ratings that the study respondents gave for specific departments where there was regular collaboration. The meets/exceeds expectation ratings with human resources, information technology, customer support/service and legal all had double-digit increases compared to the 2016 figures.



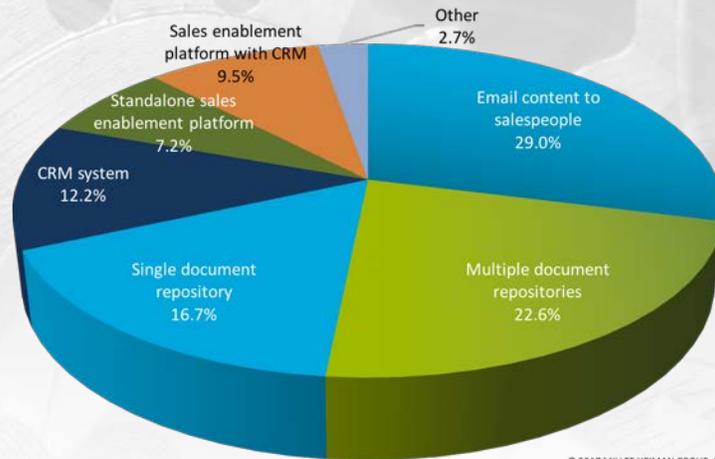
Today, only two key areas remain that have “major redesign” or “needs improvement” ratings of 50% or more: marketing and product management/development. These are two vital areas that sales needs to be successful. The data shows that when sales enablement effectively collaborates with both functional areas, the win rate of forecast deals comes in at 52.9%. This is noticeably higher than the win rate of 45.6% reported by companies that need collaboration improvement in both these areas. This is undoubtedly a problem worth solving.

Changes in Technology Adoption

When it comes to technology, we are not seeing the types of advances in organizations utilizing sales SECM (sales enablement content management solutions) that we expected to see.

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Primary Method Used to Share Content with Sales Teams



The chart shows the reported primary approaches that sales organizations are using to get content and tools into the hands of salespeople.

When we compared these results to 2016, the percentage of firms that email content to salespeople increased from 24.5% in 2016 to 29.0% this year. This places the burden of managing all that content on individual salespeople, which is obviously a suboptimal solution. Only slightly better, but still suboptimal, is placing content in multiple repositories, which is the approach of 22.6% of survey respondents.

A Business Case for SECM

For several years, we have been advocating investments in sales enablement platforms designed for easy access to content as well the ability to track what content is used and its effectiveness. This system would preferably be integrated with the company's CRM system to make content accessible as part of a salesperson's daily workflow. The numbers show essentially no progress since last year.

We asked the 16.5% of respondents who *did* have a sales enablement platform to share the top three benefits it provides. The chart summarizes their input.



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Improvements In Sales Performance Due To Sales Enablement Content Management Solution



The items on this list show a variety of ways that companies should be able to justify the cost of making this investment. While the top two benefits, improving access to content and reducing search time, are primarily efficiency benefits, the rest of the items on the list can be directly tied to effectiveness gains, which generate tangible ROIs.

The Value of SECM is increasing

This year, we have also conducted extensive research into the evolution of SECM solutions. Developers are making significant investments in integrating artificial intelligence capabilities and insights into these platforms, and we see the value that these systems can provide is ready to take off.

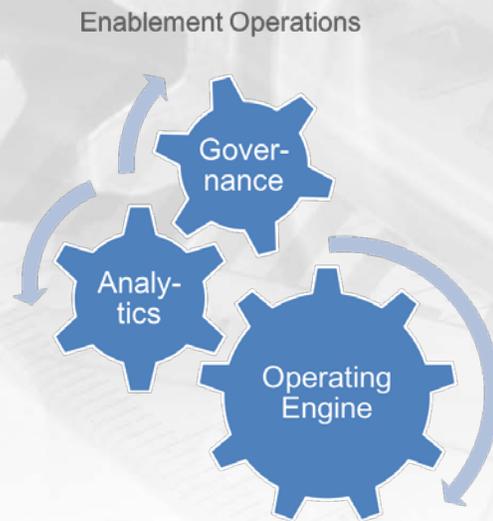
Commercially available AI-based SECM solutions can virtually coach salespeople on what content to use with which stakeholders based on their unique personas. These systems can track the prospect's engagement with content to gauge buyer intent more accurately. They can even proactively identify other highly effective salesperson-created content so it can then be shared across the entire sales force. Innovations like these just represent a fraction of what these systems will be capable of over the next two to three years. We recommend getting up to speed on what SECM is and will do. For a briefing on these technology trends, advisory services clients can contact their CSO Insights analyst.

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Enablement operations: where all the magic happens

The third pillar is enablement operations. This is not the same as sales operations. Instead, enablement operations is the structural prerequisite for an efficient, scalable and effective enablement discipline that can adapt to your changing business needs. Enablement operations is a relatively new concept, and for that reason, we will share conceptual ideas in this report and augment them with specific research in next year's study.

Enablement operations covers three primary areas: enablement governance, enablement operating engine, and enablement analytics.



Enablement governance helps address long-term strategic decisions and solve conflicts

Your governance model ensures that there is a process for making strategic and long-term decisions as well as for addressing conflicts that cannot be solved in a routine manner. We have already covered the first two pillars of enablement governance: your enablement charter as discussed in Chapter 4 and your collaboration model as discussed earlier in this chapter. The third element of a mature enablement governance model is the enablement advisory board.

Ideally, during the process of creating your enablement charter, you've already engaged senior executives in multiple one-on-one and group interviews. Doing so is crucial if you want to evolve your enablement practice to a strategic level, because your enablement practice is designed to create and maintain a platform to boost sustainable, long-term value to the business. As owners of the business strategy, senior leadership is responsible for defining what constitutes value.

Based on your approved enablement charter, your enablement advisory board becomes your liaison for staying connected to the objectives of the business and ensuring continued sponsorship for your strategy. In advisory board meetings, members can learn more about what enablement is doing and how it is impacting the business. In addition, they can address new strategic directions and upcoming challenges, such as mergers and acquisitions, and discuss with the enablement leader how to adjust priorities. Visibility into enablement also allows the advisory board members to make decisions in the case of conflicts. And, it's an excellent opportunity for enablement leaders to showcase results!

The enablement operating engine is the process layer connected to your collaboration model

The enablement operating engine is the enablement operations production process. It is the process layer that lies beneath enablement governance and is closely connected to the formalized collaboration model we discussed earlier in this chapter. The enablement operating engine defines all steps that are necessary, from the design of an enablement service to deployment and analytics.

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These steps can be categorized into phases: design, creation, localization, review, deployment and analysis. Among other things, this process details which roles are involved in the production process for an asset. Ideally, this process is also supported by technology so that it's easier for enablement to orchestrate all cross-functional resources at every step.

Implementing a formal enablement production process has tremendous potential to increase productivity and the scalability of your enablement function. Over the last couple of years, enablement has been mainly focused on the effectiveness of the provided enablement services and how they could drive sales results. However, with 59.9% of our study participants reporting that they planned to increase their sales force over the next 12 months, scalability is more important than ever. In fast-growing organizations, making new acquisitions on a regular basis, sales force enablement quickly becomes the linchpin for performance, ensuring that new sales teams can be quickly integrated.

Enablement analytics or how do to measure enablement success

We live in a results-driven, data- and metric-oriented world. This is especially true for sales organizations. Your executive sponsors and advisory board will want to see the return on their investments. Unless your sales force enablement discipline can show results, there is no reason to expect the organization to continue to invest. Without tangible results, don't be surprised if the very existence of your sales force enablement team is called into question.

What do we mean by enablement results? When we ask sales leaders, "revenue" is the most common answer.



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There are several layers of analytics, and it's not all about revenue

Measuring enablement success is an important and complex topic that probably deserves its own report. For now, we want to define what we mean by “enablement metrics.”

Enablement productivity metrics measure how efficient the enablement team is. For example, some sales enablement teams forget they need to manage assets by measuring their impact and culling or refreshing those that are no longer effective. This allows your team to focus exclusively on those services that are needed and produce results. As discussed earlier in this chapter, modern SECM systems include powerful asset analytics that make it easier for enablement teams to stay focused.

Sales productivity metrics show how enablement efforts help the sales force be more productive. Examples include reducing search time for content and increasing available selling time. When you're just getting your enablement practice off the ground, you'll probably focus on milestones, e.g., inventorying and assessing the effectiveness of existing content. However, as your enablement practice matures, you'll be expected to show an impact on sales productivity.

Sales performance metrics, such as revenue, margins, win rates, quota attainment and average deal size, measure bottom- and top-line results. In fast-growing sales organizations, reducing ramp-up times for new hires is often the most important metric for sales force enablement because it directly affects their ability to achieve their revenue goals. This example from Christine Dorrión, VP Sales & Channel Operations and Enablement at CallidusCloud, illustrates how productivity goals are essential to hit the desired revenue numbers: *“Enablement success is all about results, and it's all tied to revenue. It's our responsibility to ensure that our salespeople are hitting their targets so that the company can achieve the revenue targets. One of our key performance indicators to achieve this goal is onboarding ramp-up time, which we are constantly trying to shorten. From the first day you get started as a sales rep, we provide you with the right training, with the right content and value messaging, with everything you need to know so that you can be successful here at CallidusCloud.”*

Finally, we need to be precise when we talk about the impact of enablement efforts on performance metrics. We always refer to enablement's impact as a correlation. There are many different elements that impact these metrics, inside and outside of the sales organization, and we cannot isolate the actual impact of enablement and call it causation.

Related CSO Insights Research Content:

- [The Dark Side Of Enablement: Why You Need An Enablement Production Process](#)
- [How To Leverage Cross-Functional Collaboration Models](#)
- [For sales force enablement and sales ops, collaboration is crucial](#)



Chapter 9: Takeaways and Recommendations

Throughout this report, we've shared a lot of data points, trends, insights and recommendations. Hopefully, the clarity model made it easier for you to assimilate the information, facet by facet.

As we discussed in Chapter 1, enablement is a fast-growing discipline. Many more organizations have joined the enablement movement over the last twelve to eighteen months. This strong growth requires even more clarity on definitions and approaches so people who are new to enablement can readily learn, digest and adopt enablement best practices in their role. The clarity model builds on our definition of enablement and is designed to help you take action based on a holistic understanding of this new and fascinating discipline.

One of the most challenging aspects of enablement is that it cannot be put into a box like so many other functions in the organization. It is different because it is always cross-functional, requiring enablement leaders to orchestrate efforts across the organization to ensure consistency along the entire customer's journey. This consistency is a prerequisite for achieving the desired business goals.

To bring everything together in this final chapter, here is a summary of some of the key takeaways from the report.

Enablement has become more sophisticated:

- *Reporting structure:* The percentage of organizations that have enablement reporting directly to executive sales management has steadily grown over the last three years, while the percentage making a home for sales enablement within sales operations is decreasing. This allows the disciplines to work in parallel, with operations more focused on building the sales system's foundation while enablement builds on this foundation by providing consistent and scalable enablement services.
- *Less content created by salespeople:* Another positive trend is that less content is being created by salespeople as compared to last year. At the same time, enablement and product management are more involved in content creation, while marketing contributes at about the same level. Organizations are learning that salespeople need far more content than is usually created by marketing alone.
- *Sales coaching is maturing:* For the first time in many years, the percentage of organizations that leave coaching up to their managers has decreased substantially. Organizations have invested in sales coaching and are now mostly on an informal maturity level, which is a natural step to develop a formal and then a dynamic coaching approach.
- *Social strategies are better aligned:* More and more organizations have worked on aligning social selling strategies between sales and marketing to ensure consistency and effectiveness. Organizations that were not aligned have moved to an informal alignment. Given the social selling impact on performance (with 30% the highest we have measured in this study), this development seems very positive.



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Enablement also took a few steps back:

- *More content sharing via email or multiple repositories:* Slightly more respondents reported that they share content through email or multiple repositories than last year. However, this is in part due to the higher international participation in the study as North American organizations have advanced further in this area than other regions. It might also be because many more organizations are joining the enablement movement, and while they are offering more content, they haven't advanced their method of delivering it to the sales force.
- *Formal enablement vision and charter:* Progress in this area is slightly worse than 2016, while the performance impact of a formal charter is even greater than last year. However, this data point may also be impacted by the increase in the number of organizations joining the enablement movement since they have not yet evolved their strategy from an informal, tactical approach to a more formal, strategic one.
- *Customer's Journey alignment:* Aligning the customer's journey to internal processes seems to be a bigger challenge than expected. The data shows that enablement audience in this study is more advanced than the broader audience of our *World-Class Sales Practices Study*. However, developing a dynamic approach to customer's journey alignment is not an option. It is the foundation for customer-centric enablement services and the only alignment level that has shown a significant correlation to quota attainment over the last two years.

Where should you begin?

If you're just starting to build an enablement practice, it can be a challenge to decide where to start. There is so much to do. Below is some guidance, based on our research and our work with clients. Even if you have an enablement organization or initiative, reviewing and repeating these steps can help you take your efforts to the next level.

- **Create an Enablement Charter:**

Creating an enablement charter is the most important action you can take as it establishes an enablement foundation that sets you up for success. The process of assessing their current level of enablement maturity, the senior executives' expectations, the business and the sales strategy, and the challenges the sales force has to master gets the young enablement practice pointed in the right direction. To get started, go back to chapter four to review the impact of a charter, how to create one, and to check out at the additional resources.

- **Conduct an Enablement Maturity Assessment:**

As a part of developing your charter, you need to assess your current state of enablement maturity. There is no right or wrong answer to the question of where you are, but it is essential to have clarity on the current state before embarking on any enablement transformation initiative. Our enablement maturity model can help you assess your point of departure.



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- **Align to the Customer's Journey:**

As discussed in chapter three, aligning every phase of the customer's journey for different selling scenarios to your internal processes is not an option. This means setting up your processes so that they consider the customer's stages and required decisions and tailoring content assets to the different phases and the different challenges salespeople have to master. There is a direct correlation between alignment to the customer's journey and quota attainment, and it is the foundation for the enablement services you provide.

- **Assess your current enablement services:**

Now, assess your content and training services (whichever domain is your current focus) against multiple criteria. First, check general relevance and throw away everything that is no longer relevant. Second, assess how well the content services are tailored to the customer's journey phases, buyer roles, etc. Third, consider feedback from salespeople and customers. For training services, take the extra steps of assessing how well (product) training services are consistent with content and how well the skill, methodology and process training services address the sales force's skill profile. Also, consider how you can leverage new training formats to provide training modules that fit the sales workflow and style.

Where should you focus when you already have a more mature enablement practice?

But, what if you already have a solid sales force enablement practice that is based on a formal strategy and charter and provides training and content services aligned to the customer's journey for the entire sales force? There are several areas for improvement that we typically see with our clients. These areas are all inter-related and your strategy, captured in your enablement charter, will tell you where and how to address these topics.

- **Align and integrate enablement services:**

Customer-facing and enablement content that is not consistent with product and or value messaging training creates more confusion than value for the sales force. Moreover, you put the enablement team's credibility at stake. To get to this level of alignment, two facets of the clarity model have to be improved: formalized collaboration and efficient enablement operations. The first facet defines which roles are doing what. The latter defines the sequence of activities they perform from designing, creating, localizing, deployment, and analytics. Watch for additional research assets regarding this essential topic based on our study data.

- **Install enablement operations:**

This is the most overlooked and underestimated facet of enablement. Your charter is a starting point and guides your work, but your executive sponsors also want to see how the enablement is doing and the business impact from their investments. They will also want to know how scalable your enablement initiative is. A formal, cross-functional production process for your enablement services can improve scalability and impact.



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But, not all conflicts can be solved based on the collaboration model. An advisory board can help you address the toughest challenges and ensure continued access to senior executive sponsors. Finally, you need a solid approach for measuring success. As we discussed in Chapter 8, your enablement maturity and the services you provide will determine which metrics you use to measure success.

If you are interested in more research, tools or guidance to evolve your enablement practice, please reach out to your CSO Insights analyst. We are happy to help you achieve your enablement goals!



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[CSO Insights](#) is the independent research arm within [Miller Heiman Group](#), dedicated to improving the performance and productivity of complex B2B sales. The CSO Insights team of respected analysts provides sales leaders with the research, data, expertise, and best practices required to build sustainable strategies for sales performance improvement. CSO Insights' annual sales effectiveness studies, along with its benchmarking capabilities, are industry standards for sales leaders seeking operational and behavioral insights into how to improve their sales performance and to gain holistic assessments of their selling and sales management efficacy. Annual research studies address sales and service best practices, sales enablement and sales performance optimization.

