Executive summary

This sheet serves as your high-level overview ensuring all stakeholders understand the enablement plan's **objectives**, **key initiatives**, and **expected outcomes**. Use it to guide your plan's initial progress and return to it as you go to keep your strategy on track.

| Elements	Description	Action points
Overarching goal	Define the primary goal (e.g., "Increase sales productivity by 30% in six months").	Not started
Key initiatives	List the key projects supporting the goal (e.g., Implement a new CRM, develop a sales training program).	In progress
Target audience	Specify the sales team segments (e.g., SDRs, AEs, Enterprise Sales).	Completed
Stakeholders	Identify key roles involved (e.g., Sales Enablement Manager, VP of Sales, Marketing Director).	
Challenges addressed	What issues does this plan solve? (e.g., low CRM adoption, lack of sales content engagement).	
Expected outcomes	Define measurable results (e.g., "reduce average sales cycle by 15%").	
Timeline	Specify the implementation period (e.g., Q2 2025 - Q4 2025).	
Success metrics	How will success be measured? (e.g., sales efficiency, revenue growth, rep performance improvements).	

Enablement objectives

Use this sheet to set clear, **SMART** objectives aligned with your business goals. These are simply an example to guide you, so tailor it to your own needs and goals.

Objective	Action steps	Owner	KPI goal
Improve onboarding for sales hires	Develop structured training with certifications.	L&D	Reduce ramp-up time by 25%
Increase CRM adoption	Conduct hands-on CRM training, incentives for usage	Sales Ops	CRM adoption rate >80%
Enhance customer engagement	Train reps on personalized outreach techniques.	Sales Enablement	Boost customer retention by 15%
Reduce sales cycle length	Optimize sales process, create deal acceleration playbook	Sales Enablement	Reduce cycle time by 10 days
Increase sales efficiency	Automate repetitive tasks using AI tools	Sales Ops	Increase rep selling time by 20%

Buyer persona profiles
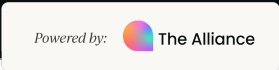
Use this template to help you develop detailed buyer personas to help sales reps engage effectively. We've filled out the first few to give you an idea of how to create the profiles.

Persona	Industry	Job title	Pain points	Buying triggers	Decision influencers	Preferred content	Preferred channel
Growth Gary	*SaaS*	*VP of Growth, CMO*	*Struggles to scale lead gen*	*New budget cycle, poor funnel conversion*	*CEO, CFO*	*Case studies, webinars*	*LinkedIn, Email*
Enterprise Emma	*FinTech*	*Director of Sales, CRO*	*Needs better reporting & analytics*	*New sales team expansion, compliance changes*	*CIO, Compliance Team*	*Whitepapers, reports*	*Events, Email*

Content plan

Follow this content matrix to ensure the **right content** reaches the **right sales stage**.

Stage of buyer's journey	Content type	Owner	Purpose	Distribution channel	Performance metrics
Awareness	*Blog posts, eBooks*	*Marketing*	*Educate prospects*	*Social Media, Website*	*Page views, time spent*
Consideration	*Case studies, Comparison guides*	*Sales*	*Address objections*	*Email, LinkedIn*	*Open rates, downloads*
Decision					
Retention					

Tech stack

Define a clear tech ecosystem for your sales enablement function.

Category	Example tools	Purpose
CRM	Salesforce, HubSpot	Manage customer interactions, pipeline tracking
Sales enablement platform	Seismic, Highspot	Centralize sales collateral, improve content access
AI-powered sales tools	Gong, Outreach, Drift	Sales automation, call coaching, chatbot engagement
Communication & collaboration	Slack, Zoom, MS Teams	Internal and external team communication
Analytics & reporting	Tableau, Power BI, Google Analytics	Track sales performance & content engagement

Training schedule

It's absolutely crucial to keep reps up-to-date with **continuous training**, use this example schedule as your guide and adjust to what fits your team best.

Frequency	Topics	Format	Owner	Performance metric
Weekly	Sales team coaching	Role-playing, peer learning	Sales Enablement	Session participation rate
Monthly	Product updates & new features	Webinars, interactive Q&A	Product Marketing	Knowledge retention assessment
Quarterly	Advanced sales strategies	Workshops, certifications	L&D	Certification pass rate
Biannually	Market trends & competitor analysis	Case study reviews	Marketing	Competitive win rate improvement

Metrics and reporting

Use this template to effectively measure and track your sales enablement strategy. We've filled out one example to give you an idea, but adjust according to your organizational needs.

KPI	Current reporting	Target goal	Measurement tool	Tracking
Lead-to-customer conversion rate	2%	10%	CRM Dashboard	*On track*
				Met / exceeded
				Needs work