Become More Strategic
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Sales Enablement Plan Methodology

Follow this **simple**, step-by-step, methodology to develop a **sales** enablement plan that increases your win-rate, **deal-size** and **% reps** attaining **quota**.

01 Get Approval

02 Prepare for Project

03 Select Solutions

04 Create a Sales Playbook

05 Launch to Sales

06 Measure & Evolve

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What is the purpose of this methodology?

To help you develop a **Sales Enablement Plan** that:

- » Is aligned with corporate values and vision
- » Provides a solid foundation for sales enablement
- » Supports the following:
  - Corporate Marketing strategy
  - Product Marketing plans
  - Marketing Communications plan

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Major Outputs from this Planning Process:

Key Deliverables – Sales Playbook & Supporting Technology Infrastructure

Stage 01 – Readiness Assessment, Business Case, Strategy Scorecard

Stage 02 – Sales Support Survey, Sales & Marketing Alignment, Assets Audit, Responsibilities

Stage 03 – CRM, Marketing Automation, and Sales Enablement System Implementations

Stage 04 – Buyer Personas, Buying Stage Content Map, Sales Playbook

Stage 05 – Launch Pilot, Roll-Out to Entire Sales Team, Roll-Out to Channel Partners

Stage 06 – Sales Enablement Metrics Dashboard, Post-Project Evaluation

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Sales Enablement Defined

Let's see how top-tier Analyst firms define "Sales Enablement":

"Sales enablement is a strategic, ongoing process that equips all client-facing employees with the ability to consistently and systematically have a valuable conversation with the right set of customer stakeholders at each stage of the customer's problem-solving life cycle to optimize the return of investment of the selling system." – **Forrester**

"The delivery of the right information to the right person at the right time and in the right place necessary to move a specific sales opportunity forward." – **IDC**

Let's see what an experienced practitioner in the field says:

"Sales enablement is about ensuring salespeople are able to have valuable conversations that help buyers advance through their buying process." **– Jeff Ernst, The Sales Enabler**

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What Can 'Enabled' Sales Reps Do Better?

- ✓ **Understand Buyer Needs** – including industry trends, common business problems, and the competitive options available to buyers to solve their issues.
- ✓ **Sell New Products** – get up to speed quickly on recently launched products.
- ✓ **Deal with Objections** – learn how to respond to common objections with answers that have been proven to put the buyer at ease and change their thinking about a key issue.
- ✓ **Pitch with Confidence** – having the knowledge and tools they need, inspires rep confidence.
- ✓ **Produce Faster** – new reps start producing in less time with a solid Sales Enablement program.
- ✓ **Equip Champions** – with content that buyers can use to internally sell your solution for you.

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Problems with Traditional Sales Enablement

In many organizations, “Sales Enablement” has been a one-way inclusion of Marketing materials into a sales portal or intranet without any real insight into what’s being used or is valued by the buyer. Symptoms of a failing Sales Enablement strategy include content repositories that contain:

- **Too much content** – good quality material is buried amongst the sheer volume of documents
- **Minimal insight** – Marketing has no idea what content is used by Sales or what’s working well
- **Organized by product** – rather than by buyer profile, industry or specific sales situations
- **Out of date content** – most reps store files locally and use out-dated sales support documents
- **Adoption issues** – when not integrated with CRM, mobile devices or email, reps don’t use it

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Sales Enablement Maturity Model

Stage 1 — Undefined

- No CRM or Marketing Automation System in place
- Sales Collateral distributed via email
- New reps hit quota in 9 mos.
- Sales Process & Buying Process are not defined
- Success metrics are unknown and not tracked
- Win Rate is less than 10%

Stage 2 — Progressive

- CRM System in place with reasonable rep adoption
- Sales Collateral distributed via portal or intranet
- New reps hit quota in 6 mos.
- Sales Process defined but not mapped to buying process
- Success metrics for top performing reps are known
- Win Rate is between 10-20%

Stage 3 — Mature

- CRM, Marketing Automation and Sales Enablement systems are in place
- Sales Collateral distributed via Sales Enablement platform
- New reps hit quota in 4 mos.
- Sales Process is mapped to Buying Process
- Success metrics tracked
- Win Rate is 20% or greater

Stage 4 — World-Class

- All systems are accessible on mobile devices
- Sales Collateral has rating and included in Playbook
- New reps hit quota in 3 mos.
- Content is mapped to buying and sales process by persona
- Success metrics are managed closely to get reps performing
- Win Rate is 25% or greater

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Demand Metric's PATCHES Framework

Use this acronym to remember a solid framework for Sales Enablement in your organization:

P – Playbooks: build a Sales Playbook to equip reps with the knowledge, tools, & activities they need to succeed.

A – Assets: maintain content and digital assets in a system that allows sales reps to rate quality and usefulness.

T – Training: consider methodologies such as SPIN Selling or Miller Heiman to standardize your sales process.

C – Commitment: get a formal commitment from sales reps to use and rate all materials provided by Marketing.

H – Hiring: sales reps with the same skills and attitudes as your current star performers.

E – Enabling Technology: CRM, Marketing Automation and Sales Enablement systems should work on mobile devices.

S – Sales Process: map your sales process to the buying process and build content based on key buyer personas.

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What Goes Inside a Sales Playbook?

A Sales Playbook is a collection of information, knowledge, sales tools, and activities that have been proven to assist with closing business in a variety of common sales situations.

You can structure your playbook like this:

1. Company Overview
2. Marketing Insights
3. Sales Opportunities
4. Stage 1 – Need / Prospecting
5. Stage 2 – Discovery / Qualification
6. Stage 3 – Consideration / Demo
7. Stage 4 – Decision / Proposal
8. Stage 5 – Review / Contract

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Why Do You Need a Sales Playbook?

51% of reps attain quota at firms using a Sales Playbook, compared to 40% at firms who don't have a Sales Playbook. Aberdeen Group, November 2011

38% of buyers felt solution providers didn't provide enough content to help them navigate through each stage of the buying process. - Demand Gen Report: Transforming the B2B Buying Process

"Only 8% of B2B companies say they have tight alignment between sales and marketing" – Forrester

65% of companies said sales teams use less than 50% of marketing content as it is not accessible, low impact or inappropriate. Corporate Visions Q2 2012 Sales and Marketing Messaging Report

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Where do Sales Playbooks Help Most?

1. **On-Boarding New Hires Faster –** when new high-caliber sales reps join your firm, they will get up to speed quicker by following the 'best practices' or 'plays' used by top performing reps rather than learning from their own experiences and failures.

2. **Improving Performance for Average Reps –** by showing a repeatable process for how your star performers achieve their results, you can increase the performance of 'middle-of-the-pack' reps who are generally the ones who affect the bottom-line the most.

3. **Radiating & Penetrating Key Accounts –** in tough competitive environments or mature industries, having key knowledge about competitors, buyer needs, and industry-based solutions can make the difference between growing an account or losing it all together.

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How to use this consulting methodology:

This methodology consists of six stages, each with a description, steps and action items. Action items include using our premium tools & templates. Our intention with this methodology is to help you:

1. **Understand** sales enablement and identify opportunities to improve your organization's capabilities.
2. **Evaluate** and select the appropriate technology that will be the backbone of your enablement strategy.
3. **Plan** and craft a strategy to drive adoption of Sales Playbooks by sales reps & channel partners.

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STAGE 01 – GET PROJECT APPROVAL

Unless your senior management team is spear-heading a Sales Enablement initiative in your company, you will have to build the case for allocating resources and funding to this project. In this Stage, you will focus your efforts around the preliminary analyses required to get approval for a Sales Enablement project:

1. Conduct a Readiness Assessment
2. Build the Business Case
3. Create a Strategy Scorecard

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STEP 1 – Assess Organizational Readiness

✓ Action Item – use the Sales Enablement Readiness Assessment to help you measure your preparedness for a Sales Enablement initiative.

Areas of the readiness assessment include:

- Senior Management Commitment
- Digital Asset Management
- Content Management Process
- Sales & Marketing Alignment
- Systems & Technology

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Sales Enablement Readiness Assessment

DO NOT ENTER VALUES INTO THIS TAB IN THE SPREADSHEET

Use these results to identify which areas will need to be addressed before tackling the project.
Evaluate your Sales Enablement Readiness Score (out of 100) to determine the preparedness of your organization.

Sales Enablement Readiness Score (out of 100)	64
Senior Management Commitment (20)	13
Digital Asset Management (20)	16
Content Management Process (20)	
Sales & Marketing Alignment (20)	
Systems & Technology (20)	8

Analysis of your Score	Score
Enterprise is ready for a Sales Enablement project. Optimize processes, select systems. Work internally to improve existing systems, processes, and capabilities until you have an effective marketing dashboard that can be used to make predictive insights and quickly identifies how changes to metrics will affect business results.	80-100

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STEP 2 – Build the Business Case

✓ Action Item – use the Business Case Template to document why senior management should allocate resources to this program.

Sections of the Business Case should include:

- Executive Summary
- Opportunity Overview
- Key Success Factors
- Assumptions
- Decision-Making Criterion
- Business Impact Analysis
- Risks & Contingency Plans
- Recommendation

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STEP 3 – Create a Strategy Scorecard

✓ Action Item – use the Sales Enablement Strategy Scorecard to document your high level sales enablement objectives, initiatives, KPIs and target timeframes.

Examples of common objectives include:

- Improve Average Deal Size
- Reduce Length of Sales Cycle
- Gain Adoption of Sales Playbook
- Audit Assets to Identify Gaps

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STAGE 02 – PREPARE YOUR COMPANY

In this Stage you will seek to understand the gaps between the Sales & Marketing departments in terms of sales support, organizational alignment, content & assets, and missing job functions & skills.

You will perform the following actions to prepare your company for Sales Enablement:

1. Conduct a Sales Support Effectiveness Survey
2. Assess Sales & Marketing Alignment
3. Audit Condition of Existing Assets
4. Outline New Roles & Responsibilities

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STEP 1 – Conduct a Sales Support Survey

✓ Action Item – use the Sales Support Effectiveness Survey to identify strengths and weaknesses in your current sales support processes, systems, assets, and knowledge management.

This survey is intended to address the following areas:

- CRM
- Demand Generation
- Lead Management
- Product Training
- Company Training
- Marketing Collateral
- Partnership Management
- Brand Awareness

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STEP 2 – Assess Sales & Marketing Alignment

✓ Action Item – Use our Sales & Marketing Alignment Tool to identify gaps in your existing alignment and see how world-class organizations structure their relationship between Sales & Marketing.

This assessment will audit these key alignment areas:

- Organizational Relationships
- Metrics & Value Measurement
- Lead Generation & Pipeline
- Culture
- Systems & Technology
- Messaging & Materials

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STEP 3 – Audit Condition of Existing Assets

✓ Action Item – Use our Marketing Collateral Management Tool to identify the condition of your existing marketing collateral and sales assets.

This audit will provide you with the following information:

- Name of Asset
- Status
- Owner
- Last Updated Date
- Usage
- Distribution

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STEP 4 – Outline New Roles & Responsibilities

✓ Action Item – Use our Director of Sales Enablement Job Description to clearly document the new role & responsibilities of the person who will be heading up your Sales Enablement department.

Some major responsibilities of this position include:

- Implementing CRM & Marketing Automation systems
- Development of a Sales Playbook
- Training, Mentoring & Coaching of Sales Managers
- Managing Technical Support for End Users
- Ensuring Sales Methodologies are Followed

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STAGE 03 – IMPLEMENT SOLUTIONS

This stage will help you select, implement and integrate your Sales Enablement solutions:

1. SFA/CRM System
2. Marketing Automation System
3. Sales Enablement System

NOTE: this methodology assumes you have a solid understanding of the systems mentioned in this Stage and know the business benefits that can be derived from implementing & integrating them.

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STEP 1 – Implement a SFA/CRM System

✓ Action Item – Use the following guide and 9 tools & templates to implement a SFA/CRM system.

How-To Guide: Develop Customer-Centricity with CRM

1. CRM Readiness Assessment Tool
2. CRM Program Strategy Scorecard
3. CRM Maturity Assessment
4. CRM Business Case Template
5. CRM Consulting Services RFP
6. CRM System RFP Template
7. CRM Vendor Evaluation Matrix
8. CRM Program Metrics Dashboard
9. CRM Administrator Job Description

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STEP 2 – Implement a Marketing Automation System

✓ Action Item – Use the following guide and 7 tools to implement a Marketing Automation system.

How-To Guide: Selecting Marketing Automation Software

1. Marketing Automation Business Case
2. Marketing Automation Consulting RFP
3. Marketing Automation Maturity Assessment
4. Marketing Automation ROI Calculator
5. Marketing Automation System RFP
6. Marketing Automation Vendor Evaluation
7. Marketing Automation Vendor Matrix

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STEP 3 – Implement a Sales Enablement System

✓ Action Item – Use the following 2 resources to select and implement a Sales Enablement system.

1. Sales Enablement System RFP
2. Sales Enablement Solutions Matrix

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STAGE 04 – BUILD A SALES PLAYBOOK

To this point, you have received approval for a Sales Enablement initiative, assessed and prepared your company, and selected the right technology solutions to be successful. Now, is the time when the rubber hits the road and you build your Sales Playbook to realize the all the benefits of Sales Enablement.

In this Stage, you will do three major activities:

1 – Define Buyer Personas

2 – Map Content/Assets to the Buying Process

3 – Create a Sales Playbook

4 – Put Sales Playbook in Sales Enablement System

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STEP 1 – Identify Key Buyer Personas & Needs

✓ Action Item – Use the Buyer Persona Template to document relevant information about the prototypical 'key players' involved in making a decision to purchase your products & services.

Characteristics you will want to capture include:

- **Background** (Job Title, Income, Age, Education)
- **Situation** (priorities, pain points, motivation, needs, goals)
- **Habits** (likes/dislikes, trusted resources, research methods)
- **Decision-Making** (authority, budget, purchase process)

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STEP 2 – Map Assets & Messages to Buying Process

✓ Action Item – Use the Buying Process Stage Template to identify the messages and assets needed to align your sales process & actions with each buyer persona's progress through their buying process.

Buying Process		Sales Actions
▪ Need	→	✓ Provoke
▪ Discovery	→	✓ Educate
▪ Consideration	→	✓ Explain
▪ Decision	→	✓ Reassure
▪ Review	→	✓ Maintain

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STEP 3 – Build a Sales Playbook

✓ Action Item – Use the Sales Playbook Template to customize your sales playbook and ensure that it will be adopted and cherished by your sales representatives and marketing department.

Here are a few resources you can include in your Playbook:

1. Case Study Template
2. White Paper Template
3. Press Release Template
4. Business Case Template

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STEP 3a – Sales Playbook: Company Overview

✓ Action Item – Use the Vision Statement Worksheet to capture your CEO's vision for the organization and add it into your Sales Playbook, along with other company facts in the Company Overview section.

A vision statement outlines what the organization wants to be, or how it wants the world in which it operates to be (an "idealized" view of the world).

Having a solid vision statement is important because:

- It is a long-term view and concentrates on the future
- It can be emotive and is a source of inspiration

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STEP 3b – Sales Playbook: Marketing Insights

✓ Action Item – Use the following 5 resources to complete the marketing information section.

1. STEP Industry Analysis Tool
2. Customer Profile Template
3. Lead Acquisition Model
4. Qualified Lead Definition Tool
5. Marketing Calendar

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STEP 3c – Sales Playbook: Sales Opportunities

✓ Action Item – Use the following 3 resources to highlight key industries, buyers, and sales "plays".

1. Market Segmentation & Analysis Tool
2. Buyer Persona Template
3. Buying Process Stage Template

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STEP 3d – Sales Playbook: Stage 1 (Building Need)

✓ Action Item – Use the following 2 resources to help sales reps build need and position your solution.

1. Positioning Statement Worksheet
2. Unique Selling Proposition Template

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STEP 3e – Sales Playbook: Stage 2 (Discovery)

✓ Action Item – Use the following 3 resources to help sales reps qualify sales opportunities.

1. Qualified Lead Definition Tool
2. Bid or No Bid Assessment
3. SPIN Selling Questions Tool

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STEP 3f – Sales Playbook: Stage 3 (Consideration)

✓ Action Item – Use the following 5 resources to help your sales reps demo your solutions effectively.

1. Feature Advantage Benefit Tool
2. Objection Responses Tool
3. Sales Script Template
4. Sales Presentation Template
5. Delivering Great Presentations Workshop

NOTE: Remember to add screenshots for how to update sales opportunities in your CRM system for this stage.

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STEP 3g – Sales Playbook: Stage 4 (Decision)

✓ Action Item – Use the following 5 resources to help sales reps improve their proposals to win deals.

1. Sales Proposal Template
2. Competitive Analysis
3. Competitive Products Sales Reference
4. Decision-Maker Influencer Map

NOTE: Be sure to include other data & success metrics in this section such as Closing Ratio %, # Meetings/Deal, Sales Cycle (avg. # days), and Revenue/month needed to be a top performer.

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STEP 3h – Sales Playbook: Stage 5 (Purchase)

✓ Action Item – Use the following resource to provide customers with your SLA post-purchase.

1. Service Level Agreement

NOTE: Be sure to ask sales reps to inquire as to whether new customers would be willing to participate in a case study or provide a testimonial to assist in future deals.

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STEP 4 – Put Playbook in Sales Enablement System

✓ Action Item – Upload the completed Sales Playbook document(s) into a Sales Enablement system to allow for tracking of usage, rating of materials, and other key analytics.

Sales Playbook can be formatted in the following ways:

- A single PDF document that can be downloaded
- A directory of files on a Sales Enablement system

NOTE: We recommend using a Sales Enablement system as it provides the most flexibility, will track individual document usage & ratings, ensures the most current version is being used and can be integrated into CRM systems & mobile apps.

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STAGE 05 – LAUNCH TO SALES

In this Stage you will be rolling out the Sales Enablement program to sales. We recommend that you start with a small pilot group of 3-10 reps who are well respected and solid performers. Once you have ironed out the kinks and incorporated the pilot group's feedback into your program you are ready to launch to the entire sales team and channel partners. There are 3 steps to go through:

1. Launch to Pilot Group
2. Launch to Sales Team
3. Launch to Channel Partners

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STEP 1 – Launch to Pilot Group of Sales Reps

✓ Action Item – get your Sales Playbook in the hands of a pilot group of sales reps for feedback and ask them to integrate the materials into their every day routine. Run the pilot for 30-60 days.

Expect to make the following revisions:

- Styling & Format
- Organization of Content
- Update Training Documents
- Add Unexpected Sales Situations
- Identify Missing Critical Assets

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STEP 2 – Launch to Sales Team

✓ Action Item – set up a training workshop to roll-out the Sales Playbook and Sales Enablement system to the entire sales team. This can be done in a live meeting or in an online webinar format.

A few key success factors for the roll-out include:

- Getting Formal Commitment to Use Playbook
- Having Top Reps Champion the Program
- Preparing Answers for Objections from Sales Reps
- Ensuring Senior Management Sponsorship
- Making the Playbook Easy to Use to Find Sales Tools

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STEP 3 – Launch to Channel Partners

✓ Action Item – set up a training workshop to roll-out the Sales Playbook and Sales Enablement system to your channel partners. Again, this can be done in a live meeting or in an online webinar format.

Here are a few additional resources to help you manage your channel program:

- Distributor Metrics Dashboard
- Partnership Application Form
- Partnership Development Tracking Tool
- Partnership Marketing Assessment
- Partnership Marketing Agreement
- Partnership Marketing Evaluation Matrix
- Referral Partnership Agreement

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STAGE 06 – MEASURE & EVOLVE

Now that your Sales Enablement program and Sales Playbook has been launched, you need to take a moment to reflect on the program, measure success or the initiative and plan for the natural evolution and maintenance of your Sales Playbook. In this Stage you will:

1. Set Up a Metrics Dashboard
2. Conduct a Post-Project Review
3. Update the Sales Playbook

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STEP 1 – Set Up a Metrics Dashboard

✓ Action Item – Use our Sales Enablement Metrics Dashboard to collect key metrics and compare with previous results, before the Sales Enablement initiative was launched.

Following are some key metrics you want to analyze:

- Average Deal Size
- Win/Loss Rate
- Sales Cycle Length (days)
- # Monthly Downloads from Sales Enablement system
- Adoption Rate of CRM system
- Adoption Rate of Sales Enablement system

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STEP 2 – Conduct a Post-Project Evaluation

✓ Action Item – Use our Post-Project Evaluation to determine the overall success of the project, document lessons learned and provide closure on the first round of activities.

Here are the sections of the post-project evaluation:

- Overall Project Assessment
- Scope Management
- Quality of Deliverables
- Key Accomplishments
- Improvement Opportunities
- Future Considerations
- Best Practices Developed

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STEP 3 – Update the Sales Playbook

✓ Action Item – Create a quarterly or semi-annual project to formally audit all Sales Playbook materials to ensure they are up-to-date and new 'best practices' and analyses have been added.

When Do You Need to Update the Sales Playbook?

- When New Marketing Assets are Created
- A Top Performing Rep Discovers a New 'Best Practice'
- New Products are Launched or Acquired
- There is a Change in Senior Leadership
- The CEO Sets a New Vision for the Company

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Conclusion

- ✓ At the end of any project, it's always a good idea to review it and identify areas for improvement.
- ✓ Demand Metric has the tools and expertise to help you build an effective Sales Enablement program:
  - » Create or audit your existing Sales Playbook
  - » Assist with using any of the tools referenced in this methodology
  - » Provide hands-on marketing assistance to accelerate achieving your marketing department's goals.

To learn more, simply contact Demand Metric: info@demandmetric.com

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