

Sales Enablement:

Best Practices, Case Studies & Insights

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EXECUTIVE SUMMARY

Sales Enablement has become one of the most critical arenas for success for Modern Marketing and Sales organizations. This functionality has moved from the IT department, with its focus on the centralization and distribution of sales centric data, across the entire company to impact the success of all key departments from the executive suite to the Big Data analysts. Sales Enablement has fundamentally redefined the way Marketing and Sales teams do their jobs.

In this Best Practices Report on Sales Enablement, we will cover Sales Enablement from strategies, processes and trends through the primary vendor solutions in six distinct categories to enable you to create an effective Sales Enablement function for your organization. Here are some of the highlights:

- Our research, benchmark studies, methodologies and tools have consistently shown that Sales Enablement has a very significant and positive impact on the organizations that are employing it, when they do so by following best practices and processes.
- Both internal company and external market/competitive forces are driving the need for Sales Enablement within Mid-sized Enterprises. We have identified ten factors as the most notable trends creating the willingness to engage in Sales Enablement.
- **The first step in Sales Enablement is to make sure the marketing and sales functions are properly organized for success.** Success for Sales Enablement is built around one basic tenet – Alignment. Here we look at World-Class Sales and Marketing Alignment in five key areas:
 - Marketing & Sales Operations Alignment
 - Roles and Responsibilities
 - Process Alignment
 - Content Alignment
 - Technology, Systems & Platform Alignment
- In our Sales Enablement Benchmark Study, 37% of participants said that Sales had responsibility for Sales Enablement, 28% said Marketing was responsible and 7% named Operations as the driver for Sales Enablement.



- **Our research shows that larger companies, who view Sales Enablement strategically rather than operationally, are getting more benefits from their use of Sales Enablement.**
- Our Demand Metric Sales Enablement Framework shows the impact of Sales Enablement on six key areas of the organization (roles, responsibilities, processes, technology, content & metrics).
- Our Solutions section covers the Sales Enablement systems and applications from six solution categories to help your team choose the right vendors and applications for your needs:
 - **Enablement Knowledge Management (KM)** – These solutions create and distribute the knowledgebase Sales needs to confidently present company products/services.
 - **Configure, Price, Quote (CPQ)** – These solutions enable Sales to custom configure product solutions from large inventories, price configurations for profit and streamline the proposal process.
 - **Sales Intelligence** – These solutions enable Marketing and Sales to monitor, measure and predict customer engagement and sales performance.
 - **Communications Solutions** – These solutions have evolved from audio conferencing tools into solutions that offer comprehensive audio, web and webinar platforms to support activities from sales meetings to full scale 3D virtual tradeshow.
 - **Customer Relationship Management (CRM)** – These solutions provide the foundation for sales performance and have expanded, through vendor acquisition and feature enhancements, to integrate much of the core functionality for full-scale Sales Enablement within Sales Operations.
 - **Marketing Automation (MA)** – These solutions provide the foundation for marketing performance, which also have expanded through acquisition and feature enhancements, to include much of the core functionality for full-scale Sales Enablement within Marketing Operations.



Demand Metric's key recommendation from this report is that Sales Enablement can make a significant and positive impact on the organizations that are employing it, when they do so by following best practices and processes.

We offer this report to support your organization in making your Sales Enablement function the best that it can be.

You can begin your Sales Enablement initiative by reviewing the best practices and practical tools/templates in Demand Metric's [Sales Enablement Plan Methodology](#).



Figure 1: Sales Enablement Plan Methodology



WHAT IS SALES ENABLEMENT?

Sales Enablement is a new and emerging function within most organizations today. As such, like all emerging arenas, the definition of Sales Enablement often shifts depending on the perspective of the company, user and implementation. Still, a foundational definition of Sales Enablement is clear.

Demand Metric defines Sales Enablement as the processes, practices, technologies and tools that improve the performance and productivity of the Sales organization. Sales Enablement enhances the ability of the Sales team to increase company revenue through Sales.

Bottom-Line – Sales Enablement drives revenue by directly impacting a sales team's ability to close more deals.

Determine your organization's readiness for a Sales Enablement initiative with our [Sales Enablement Readiness Assessment](#).

Senior Management Commitment		
Description of Best Practices	Score	Areas of Concern
Senior management are committed to providing resources and funding for Sales Enablement.	5	
Senior management are increasing our investment in Sales Enablement each year.	4	
Senior management will authorize the building of a cross-functional team to complete this project.	1	
Senior management are aware of the importance of enabling our sales reps and channel partners.	3	

Digital Asset Management		
Description of Best Practices	Score	Areas of Concern
We have a Sales Playbook that contains information, tools, and metrics required to succeed in Sales.	4	
Our assets and collateral are customized to specific buyer persona, industries, sales situation, etc.	5	

Figure 2: Sales Enablement Readiness Assessment



WHAT'S DRIVING THE NEED FOR SALES ENABLEMENT?

Both internal and external forces are driving the need for Sales Enablement. We have identified ten factors as the most notable trends creating broad interest in a Sales Enablement initiative:

- 1. Driving Revenue and Company/Sales Performance** – This can be seen in companies that have experienced flat or declining sales and companies that set aggressive new sales targets.
- 2. Doing More with Less** – Marketing is taking on more responsibility for lead qualification & revenue responsibility. Sales Enablement can help Marketing meet that challenge.
- 3. Declining Sales or Growth Curve Plateau** – SE can increase sales productivity by reducing prospecting time and decreasing the sales cycle.
- 4. Expanding an Organization Rapidly** – SE makes Sales more agile as lead generation/nurturing falling to Marketing.
- 5. Growing a Sales Team** – Sales Enablement can cut the onboarding process for new sales reps.
- 6. Buying & Customer Decision Process Changes** – Customers now do 50-60% of their buying research before speaking with a sales rep. SE applications can help companies target content to the buyer's direct needs, increasing close rates.
- 7. Increasing Competitive Pressure** – Sales Enablement enables sales reps to position their products against the competition with higher quality, customized content, demos, quotes, etc.
- 8. Escalating Market Speed/Changes** – Sales Enablement reduces the conflict between Marketing and Sales, which reduces the lag time between marketing efforts and a sales close.
- 9. Introducing New Products/Services** – This introduction may create a new customer or market opportunity. SE speeds sales training on new products/services/markets and getting new products/services in the field faster.
- 10. Supporting Push from Corporate/Executive Teams** – Executive support for alignment/integration drives the SE initiative and provides critical resources in staffing and budgets.



SALES ENABLEMENT & THE MMO

Sales Enablement became a major focus for vendors, analysts and the technology industry around 2008. It was driven by global Enterprises that were struggling with ways to improve sales productivity and performance while cutting costs to address the challenges of the Great Recession.

While these same challenges were, and are, being faced by Mid-sized Enterprises, the tools and technologies that fit the budget and organizational size of Mid-sized Enterprises were not always readily available. Today, they are. **Mid-sized Enterprises can now take full advantage of Sales Enablement processes and solutions and reap the benefits.**

Our research has shown that Sales Enablement becomes a critical factor in companies that have at least three or more dedicated sales people and where product/service sales cycles are typically three months or more.

Sales Enablement is equally, if not more critical, for Mid-sized Enterprises in which Marketing and Sales are disconnected, silo'ed and/or working at cross purposes. This often happens when companies are in a growth spurt with hiring and revenue. Speed sacrifices process and coordination; and systems can breakdown. It's important to address this challenge as quickly as possible and a Sales Enablement initiative can help.

Several other factors that trigger the need for Sales Enablement within the Mid-sized Enterprise, as noted previously in the Key Drivers section of this report. These factors are especially important for organizations that have not yet begun the process of evaluating Sales Enablement.



BENEFITS OF SALES ENABLEMENT

As mentioned previously, our research, benchmark studies, methodologies and tools have consistently shown that Sales Enablement has a very significant and positive impact on the organizations that are employing it, when they do so by following best practices and processes.

In our Sales Enablement benchmark study, 33% of the respondents said Sales Enablement had a significant positive effect on their organization.

The primary benefits of Sales Enablement include:

1. **Improvement of Sales Team Performance and Productivity** so that they are better equipped to:
 - **Understand Buyer Needs** – including industry trends, common business problems and competitors
 - **Sell New Products** – quickly learn about new products.
 - **Deal with Objections** – learn common objections and answers that will change customer thinking on a topic.
 - **Pitch with Confidence** – having the knowledge and tools they need inspires sales rep confidence.
 - **Produce Faster** – new reps start producing in less time.



2. Alignment of Marketing, Sales and Operations so all teams are working together to reach the same revenue targets. SE:

- Offers increased demand and lead generation opportunities to build a reliable lead pipeline.
- Supports lead nurturing (Marketing) to reduce sales cycles by producing high quality, closeable leads for Sales.
- Reduces or eliminates “non-sales” work by Sales teams, including administrative work, research and service calls.
- Breaks down the traditional barriers between teams.

3. Creation of Processes/Practices that Streamline the Flow of Information in order to produce more revenue. SE:

- Identifies cross-selling opportunities.
- Performs analysis to understand the sales process.
- Develops strategies that help the sales process.

- Creates materials & assets to improve sales team's effectiveness.

4. Equipping your Customer's Internal Buyer Champions to:

- Help buyers see the solution to their problems using your company's products/services.
- Frame the evaluation criteria so that the competitors are at a disadvantage.
- Justify the purchase and sell within his/her organization.
- Use content that buyers can easily utilize to internally sell your solution for you.

5. Gaining Market Share for New Products/Services More Quickly.



SALES ENABLEMENT LANDSCAPE

History

While many marketers have become familiar with SE in the last five years, technology supporting SE functions has a long history in large organizations. The timeline¹ begins as early as 1992:

- 1992 saw the first use of the term Sales Enablement to emphasize a more holistic approach to sales training and new product launch. From this beginning, more formal processes focused on improving sales:
 - The first generation product for Sales Enablement was built on Lotus Notes to support a private software firm.
 - **Key Tool/Technology Leaps:** central storage of marketing material online and unstructured collaboration using the Notes discussion database feature.
 - **Key Challenge:** difficulty managing product & content changes.
- The focus of this early system was on effectively onboarding new sales hires and sharing best practices.
- The Notes discussion database was used to collaborate on deals, content and win/loss reporting.
- This solution was delivered as part of an Intranet.
- 1998 saw the first use of the term Sales Enablement in the commercial market and the first formal market promotion to build awareness of Sales Enablement in the commercial market.
 - In 1998, the scope of SE expanded to include supporting & selling roles with the focus on scaling organizations, supporting growth and organic product development
 - A second generation product for Sales Enablement was built for the private software company using first generation web technology.



- In Nov. of 1998, the www.salesenablement.com domain was registered with plans to promote Sales Enablement to the commercial market. These plans involved:
 - **Key Tool/Technology Leaps:** accessibility via web browser, central content management and ease of use and connectivity.
 - **Key Challenges:** difficulty managing content, lack of integration and no analytics
 - The demonstration of SE for scaling direct & indirect sales teams, which lead to successful U.S. IPO in 1999.
 - 2003 saw the first commercial use of a robust Sales Enablement solution. In 2003, the industry saw the:
 - First SaaS version of Sales Enablement available to the commercial market.
 - The scope of SE expand to include channel sales and customer enablement through portals, using the same SE platform with content sharing across all users.
 - Third Generation software products – iCentra software company started offering SE Platform for the commercial market built on a multi-tenant SaaS platform.
 - Technology, including a “next gen” web application accessible via web browser with three main technology components – content management, portal creation & management and analytics.
 - Delivery was focused on quick time to value with business users able to manage platform and content.
 - Between 2003 and 2008, vendors offered generic marketing and sales productivity products/services that began to rebrand and retool their offerings, specifically around Sales Enablement.
 - In 2008, Sales Enablement became a major focus of vendors, analysts and the technology industry and the term Sales Enablement became widespread.
- Today, Sales Enablement solutions are used by countless users in almost every industry and vertical market.**



1998: The term Sales Enablement appears in the commercial market with formal marketing promotion, the second generation Sales Enablement product was built for a private technology company & www.salesenablement.com became a registered domain

2003: The first SaaS version of a Sales Enablement platform is released to the commercial market & third generation Sales Enablement software products are launched

2014: Sales Enablement is prevalent in almost every industry & vertical market

1992: The term Sales Enablement appears as a holistic approach & the first generation Sales Enablement product (Lotus Notes) is launched

1999: Successful U.S. IPO after demonstration of the possible business scalability with Sales Enablement

2008: The term Sales Enablement becomes widespread & vendors, analysts and the technology industry becomes focused on Sales Enablement

Figure 3: Sales Enablement Timeline



Key Categories

Too often, Sales Enablement is considered one vast landscape with many vendors competing for the same dollars, budgets and customers. Nothing could be further from the truth.

Our analysis of the landscape indicates that it is comprised of six distinct categories.

Two of these categories, Customer Relationship Management (CRM) and Marketing Automation (MA), create the foundation of the technology infrastructure for Sales Enablement as well as represent large market segments of their own.

The other four categories are Enablement Knowledge Management (KM), Configure, Price, Quote (CPQ), Sales Intelligence and Communications Solutions.

Our Technology Landscape for Sales Enablement (**Figure 4**) illustrates how these categories are related and integrated.



Figure 4: Technology Landscape for Sales Enablement



Evolution of the Landscape

Sales Enablement solutions continue to mature and evolve in functionality and capability across the landscape. They are becoming more tightly integrated and consolidated with core CRM and MA systems.

Advanced features, such as real-time behavior tracking, real-time relationship mapping and predictive analytics are becoming the norm. Rich multi-media presentations delivered with on-the-fly customer/user-customized content are now available for field sales. Growth in the other four categories is expected as follows:

- Within Enablement KM, Demand Metric expects B2C solutions to offer increased personalization and localization of content down to the ability of a campaign to present new offers to a customer while they are in front of the relevant display case.

In B2B scenarios, applications track what collateral is used and how effectively it is used as well as letting sales reps rate the quality of the content, which gives marketers a deep view into the true sales value of the content they are producing.

- Within CPQ, Demand Metric expects the landscape to be characterized by increasing integration and consolidation. Current niche functionality, such as value-based pricing & modeling and sales playbooks will be integrated into core CPQ solutions.
- Within Sales Intelligence, Demand Metric expects growth to be focused around the increasing real-time automation of intelligence with predictive analytics, real-time relationship & connection mapping and sales performance evaluation.
- Within Sales Communication Tools, Demand Metric expects these solutions to incorporate:
 - Comprehensive social and mobile marketing tools
 - Sophisticated analytics dashboards and metrics
 - An increasingly higher-impact audience experience as typified by the 3D tradeshow events



SALES ENABLEMENT DEPLOYMENT

The Organizational Big Picture: Our Framework

Our Sales Enablement Framework provides an at-a-glance view of the key components of Sales Enablement, including roles, responsibilities, processes, technology, content and metrics. **Figure 5** (on the next page) illustrates Demand Metric's Sales Enablement Framework in more detail. Each of our six technology/vendor categories is represented in the Framework, as follows:

- Enablement KM products/services are associated with:
 - Senior Management uses Marketing Resource Management for thought leadership, webinars and conference keynotes.
 - Product Marketing uses Content Management for data sheets, case studies, proposals and presentations.
 - Sales Operations uses the Sales Content Portal for Sales Playbooks.
- Marketing Operations uses Asset Management and Marketing Resource Management for buyer personas and customer journey maps.
- Demand Generation uses Digital Asset Management for How-To Guides, resource reports and Webinars.
- Sales/Account Management uses the Sales Content Portal for sales scripts.
- CPQ products/services are associated with Sales Operations and Sales/Account Management, although many CPQ functions are used in collaboration with Marketing and Marketing Operations.
- Sales Intelligence products/services are associated with metrics in every organizational role from Senior Management to Customer Support. Sales Intelligence metrics are most critical in the Sales Operations and Sales Account Management roles most closely associated with Sales Enablement.

Sales Enablement: Best Practices, Case Studies & Insights



ROLES	RESPONSIBILITIES	PROCESSES	TECHNOLOGY	CONTENT	METRICS
Senior Management	Revenue Accountability Staffing & Channel Management Reporting to CEO/Board	Budgeting & Planning Performance Reviews & QA Recruitment & Retention	CRM Business Intelligence MRM	Thought Leadership Blog Webinar Presentations Conference Keynotes	Revenue by Channel Customer Lifetime Value, NPS Return on Customer (ROC)
Product Management	New Product Development Create Sales Tools/Guides Messaging & Positioning	Product Launch Win/Loss Analysis Competitive Analysis	Product Mgmt. System Enterprise Feedback/Survey Content Management	Data Sheets, Whitepapers Case Studies/Testimonials Competitive Analysis	Market Share, Profitability Brand Equity Content Usage
Sales Operations	Build Reports & Dashboards Monitor Sales Productivity Data Management	Sales Forecasting Territory Management Sales Compensation	CRM Proposal/CPQ Sales Content Portal	Compensation Model TCO/ROI Calculators Sales Playbooks	% Quota Achieved Sales Cost/Revenue Ratio Incentive vs. Quota Ratio
Marketing Operations	Build Reports & Dashboards Marketing Systems Admin Data Management	Marketing Budgeting Campaign Analysis Lead Scoring & Nurturing	CRM & Marketing Automation Analytics & B.I. Asset Mgmt. & MRM	Buyer Personas Customer Journey Map Proposals, Presentations	Sales Qualified Leads Cost Per Lead (CPL) Cost of Acquisition (CAC)
Demand Generation	Lead Generation & Events Branding & Social Media Content Marketing	Advertising/Sponsorship Lead Generation & Appointments Tradeshows & Webinars	Marketing Automation/Email Digital Asset Management Event/Survey Management	How-To Guides Research Reports Webinars	Campaign ROI, Email Metrics Marketing Qualified Leads Contribution to Pipeline
Sales/Account Mgmt.	Customer Acquisition Customer Retention Up-sell/Cross Sell	Sales Process Opportunity Management Contact Management	CRM Proposal/CPQ Sales Content Portal	New Features/Ideas for R&D Objection Responses Sales Scripts	% Quota Achieved Renewal Rate, Revenue Opportunity Metrics
Human Resources	Staffing for Sales Enablement Sales Training Performance Management	Recruiting & Hiring New Rep Onboarding Performance & Firing	HRIS Learning Management System LinkedIn & Job Websites	Job Descriptions Quality Assurance/Coaching Sales Training Manual	Avg. Time to Achieve Quota % Unsuccessful Hires # CV/Resume Submissions
Customer Support	Customer Service/Support Identify Sales Opportunities Customer Insight/Feedback	Helpdesk (phone support) Email Support (case/ticket) Online Community Requests	Customer Support, Twitter CRM, Order Management Accounting/Billing/ERP	New Features/Ideas for R&D Support Scripts FAQs, SLA	Avg. Time to Resolution % Escalations to Tier 2 Net Promoter Score (NPS)

Figure 5: Sales Enablement Framework



- Sales Communication products/services are associated with Senior Management, Product Marketing, Demand Generation, Human Resources and Customer Support through meetings, collaboration, sales presentations and Webinars.
- CRM products/services are associated with the following roles and processes:
 - Senior Management uses CRM to support budget & planning, performance reviews & retention of sales reps.
 - Sales Operations uses CRM to support sales forecasting, territory management and sales compensation.
 - Marketing Operations uses CRM to support budgeting, campaign analysis and lead qualification.
 - Sales/Account Management uses CRM to support contact management, opportunity management and the sale process.
- Customer Service uses CRM to support helpdesk and case management, email inquiry management and online community requests.
- MA and related Marketing Resource Management (MRM) products/services are associated with the following roles and processes:
 - Senior Management uses MRM to support budget and planning, performance reviews and the retention of sales reps.
 - Sales Operations uses Marketing Automation to support sales forecasting, territory management and sales compensation.
 - Marketing Operations uses Marketing Automation to support budgeting, campaign analysis and lead qualification.
 - Demand Generation uses Marketing Automation to support advertising campaigns, lead generation and Event Marketing.



Sales and Marketing Alignment

As we said at the outset of this report, effective Sales Enablement requires solid alignment between the Marketing and Sales departments. It further requires a corporate directive from the Executive Management team that alignment is a critical factor and Key Performance Indicator (KPI) of overall organizational success.

Without that support, Sales Enablement will struggle to meet its objectives.

Here we look at World-Class Sales and Marketing Alignment in five key areas:

- **Marketing and Sales Operations Alignment** – Two key functions that must cooperate and coordinate for Sales Enablement to be effective within the organization are marketing and sales operations. Where processes, technologies and tools can be integrated into the organization, it is at the Operations level that day-to-day successful Sales Enablement occurs.
- **Marketing Operations** – Marketing Operations is a relatively new unit within the Marketing department, characterized by an emphasis on strategy, performance and process beyond the

traditional marketing roles of branding, marketing campaigns, collateral and public relations (PR). A World-Class Marketing Operations group drives:

- Strategy for all customer facing activities and sales alignment
- Process development for all marketing-related functions including opportunity identification, lead generation, lead scoring/lead nurturing, campaign planning, etc.
- Budgeting and forecasting, including predictive modeling
- Sales training and professional development
- Marketing systems and data, including MA, CRM, content development and delivery systems
- Performance management, analytics, metrics and measurements, using the systems to support and track key processes that support alignment



Roles and Responsibilities. Since Marketing Operations is responsible for performance, process, budgeting and systems, Marketing Operations roles include Finance, IT, Sales Operations and other analytical/process-oriented roles as well as traditional marketing and customer engagement functions.

- **Sales Operations** – Like Marketing Operations, Sales Operations is responsible for the strategy, processes, performance, technology and measurement for the Sales department. A World-Class Sales Operations unit will provide Sales Management and teams with the processes, technology and metrics to support and improve:
 - Business decisions to drive short-term and long-term sales objectives
 - Alignment of sales resources with the greatest opportunities for customer growth, revenue and profits
 - Sales team performance through better processes, technology and methodologies



Figure 6: Components of World-Class Sales & Marketing Alignment



Roles and Responsibilities. To achieve these goals, Sales Operations focuses on:

- Sales Strategy, including design, planning, execution of sales from opportunity identification through close
- Compensation, Sales Quota & Policies
- Pipeline, Customer, Deal & Revenue Forecast
- Technology & Tools (optimization of CRM for revenue)
- Sales Training and Communication
- Sales Territories
- Lead Management
- Customer Segmentation
- Performance Metrics, Tracking & Analytics

The Sales Operations team members must be effectively aligned within the organization, not only with Marketing, but also with Finance and IT departments.

- **Process Alignment** – The key areas where Marketing and Sales Operations must have integrated process alignment include:
 - **Accountability** – Regardless of whether SE sits in Sales or Marketing, joint accountability through reporting and incentive structures must be developed and maintained.
 - **Lead Qualification** – Marketing Operations should maintain the process for lead generation and initial qualification with handoff to Sales occurring when the qualified lead becomes a closeable opportunity
 - **Lead Management** – Qualification only begins the process of lead management. Increasingly, Marketing is responsible for ensuring that the lead Sales receives is ready to close. Lead management includes lead scoring and nurturing until the lead becomes an opportunity.



- **Sales Readiness** – While Marketing Operations is not responsible for developing sales skills, it should be held responsible for the sales training and support tools needed to ensure the Sales team is ready for the call. This includes arming them with the right education, content and customer examples to handle objections and create internal buying champions within the customer organizations.
- **Technology** – Technology and system alignment is a key factor and will be covered in the Organizational Impact section of this report.
- **Feedback** – Marketing should be responsible for key customer, product, industry, competitive and market intelligence while Sales should be responsible for customer experience feedback.
- **Content/Data Alignment** – For the purposes of this report, we will focus content/data alignment in three areas – Knowledge, Training and Tools.

In each area, Marketing & Sales have joint accountability & performance requirements, as detailed here:

- **Knowledge Alignment** – This includes answers to the following: 1. Does the sales team have the information it needs to close deals? (This includes complete understanding of the company products/services, the market, the competitive environment, customer segmentation, personas and the buying process.) 2. If they do not know, do they know where to easily access that information? 3. Do they know how to measure their own performance? Internally, by quota and goals? Externally, by marketing and customer performance metrics?
- **Training Alignment** – This requires that Marketing develop and provide on-going sales training to all members of the Sales team. Weekly training sessions are recommended to keep sales and marketing personnel up-to-date on the latest insights and findings on customers, markets and competitors.



- **System/Tools Alignment** – This includes the technology, systems and applications that provide data and sales support (CRM systems to Sales Enablement applications, mobile applications, playbooks, content and collateral). Ensuring both Marketing and Sales have access to, and an understanding of, all the tools available is critical to effective alignment. We cover these systems, technology and tools in the Organizational Impact & Solutions sections of this report.
- **Technology, Systems, Platform Alignment** – Effective Sales Enablement requires that the right technology and systems are aligned. We have identified the following key areas as critical for success:
 - CRM & MA
 - CPQ/Contract & Proposal Management
 - Enablement KM (Asset Management, Distributed Marketing Platform, content personalization & localization and presentation capabilities)
 - Content Development and Management – Sales content includes playbooks, white papers, case studies, product at-a-glance documents, sales pitch decks, call scripts, product data sheets, new product positioning documents, etc.
 - Communication Systems that support live, mobile & audio/video/web conferencing & webinars
 - Event Management for live and virtual conferences and tradeshow
 - Customer Feedback Systems
 - Sales Intelligence for Analytics and Business Intelligence



ORGANIZATIONAL IMPACT

As previously noted, Sales Enablement is having a positive impact on those organizations that employ best practices around the function.

Our research shows that larger companies, who view Sales Enablement strategically rather than operationally, are getting more benefits from their use of Sales Enablement.

Furthermore, and unsurprisingly, organizations that have had Sales Enablement in place longer and who have staffed and budgeted appropriately are more successful than those who do not.

Sales Enablement Roles and Functions

Our benchmark study on Sales Enablement shows that more large companies than medium or small companies report having a Sales Enablement function.

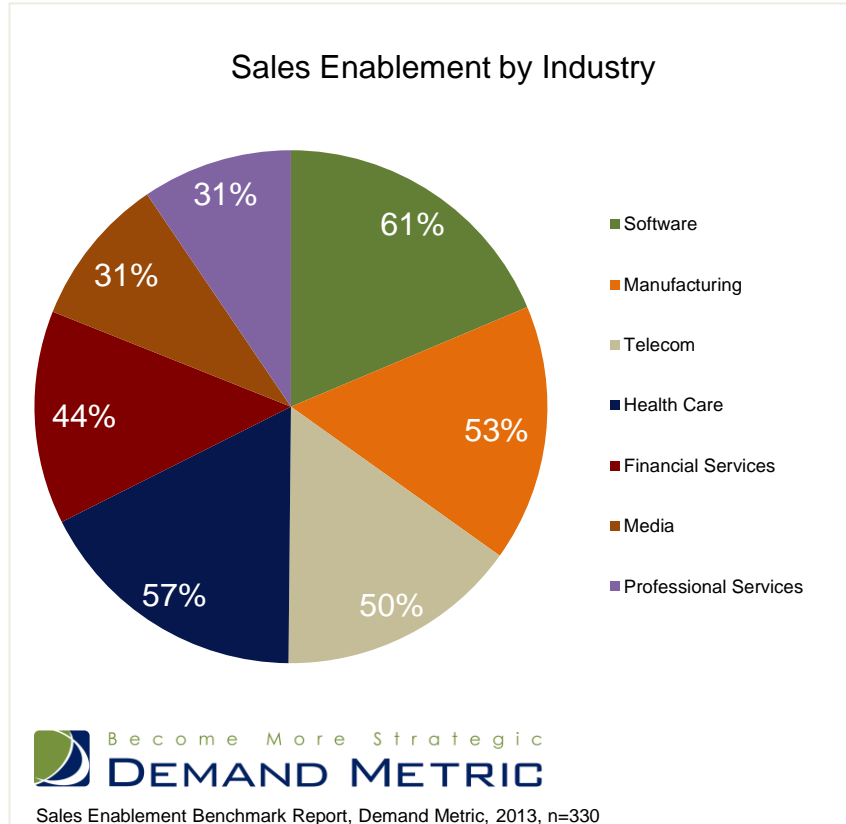
Figure 7 describes how participants reported on the presence of the Sales Enablement function in their organizations.

Company Size	Yes	No	Don't Know
Small (>\$25M)	38%	52%	10%
Medium (\$26-\$500M)	55%	37%	8%
Large (<\$500 M)	68%	25%	7%

Figure 7: Sales Enablement Function by Company Size



Figure 8: Sales Enablement by Industry



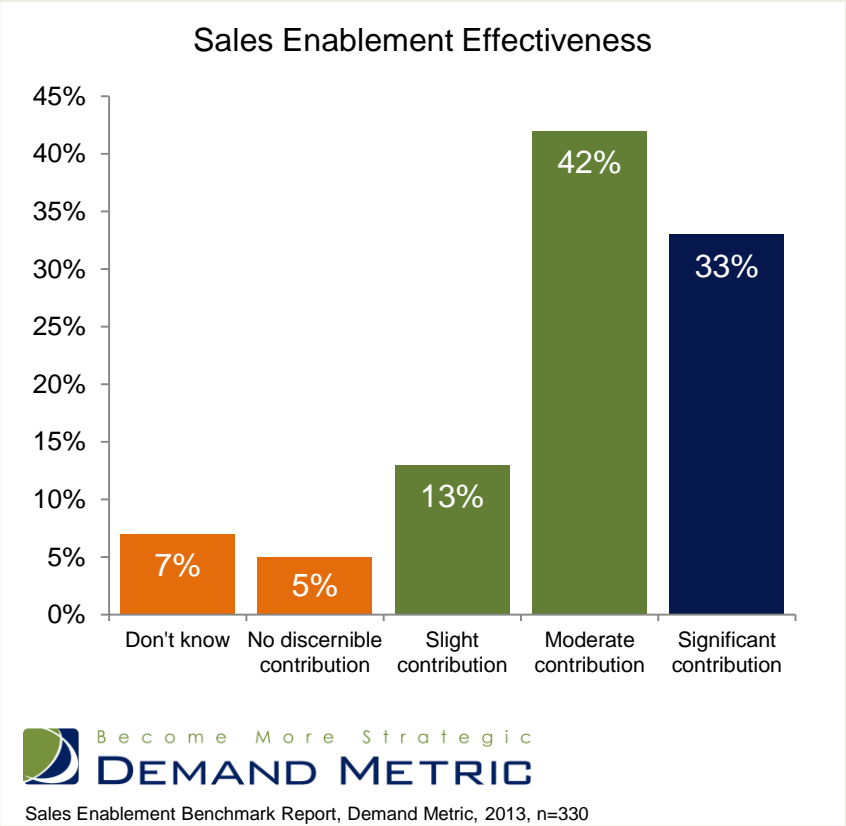
In terms of industries:

- 61% are in Software/Technology
- 53% are in Manufacturing
- 44% are in Financial Services
- 31% are in Media & Publishers
- 50% are in Telecommunications
- 57% are in Healthcare
- 31% are in Professional Services

Figure 8 provides an illustration of this data.



Figure 9: Sales Enablement Effectiveness



Effectiveness and Best Practices

Our research shows that Sales Enablement’s contribution to the organization is highly dependent on several key factors, including length of deployment, staffing and budget allocation.

In our study, we measured effectiveness by asking participants to indicate contribution on a scale that included options for not discernible, slight, moderate or significant (as seen in **Figure 10**).

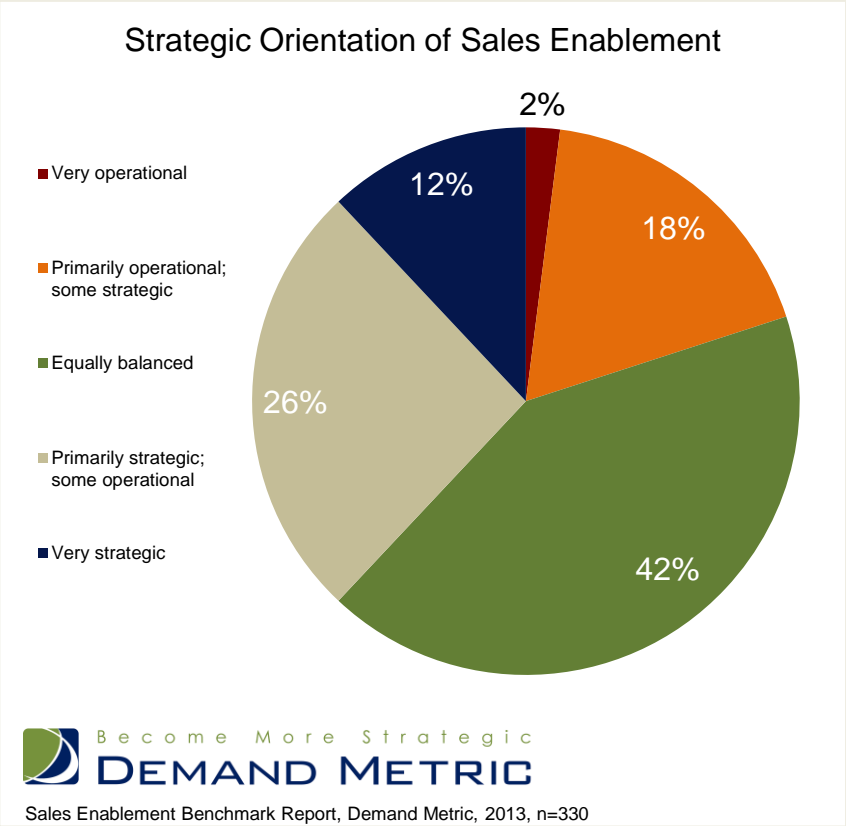
A total of 75% said that Sales Enablement was making a moderate to significant contribution.

Of that, 33% said that it was making a significant contribution and 42% that the contribution was moderate.

Just 18% said that Sales Enablement had made no discernible or a slight contribution.



Figure 10: Strategic Orientation of Sales Enablement



Strategic Versus Operational

The most significant finding of our study is how the organization views Sales Enablement, whether it is considered strategic or operational.

Overall, for those who report having Sales Enablement, 20% said it is oriented very or primarily operationally. 42% said it is balanced between operational and strategic; and 14% said it is oriented primarily or very strategically.

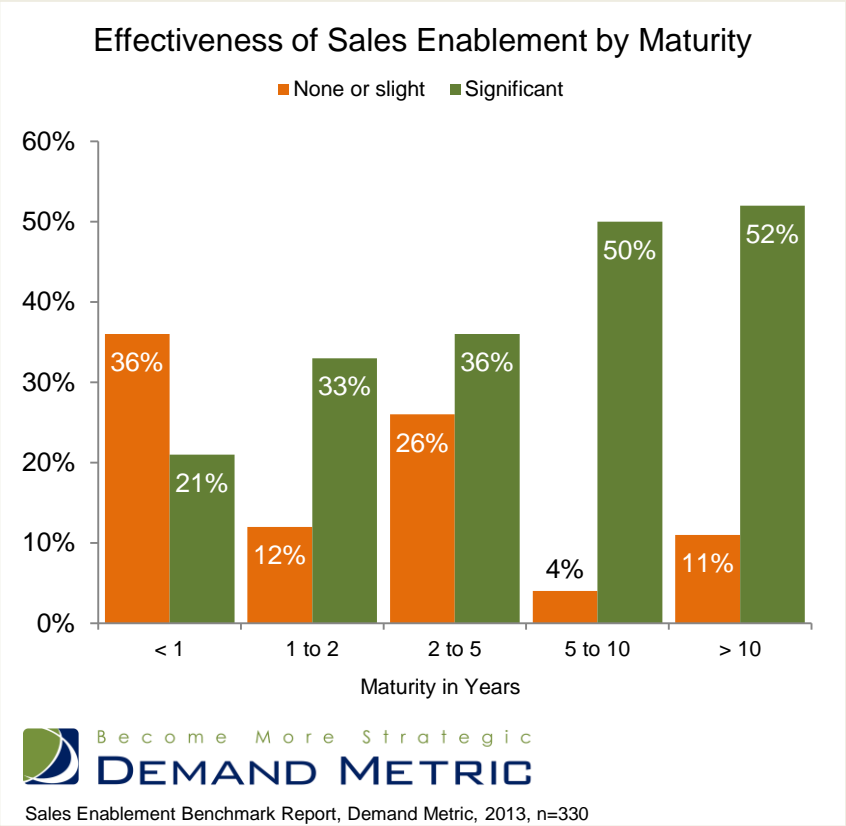
Our research shows that more organizations are leaning toward operational.

However, when viewing orientation through the effectiveness data, there's a huge difference. 39% of companies that claim to have effective Sales Enablement report that it is oriented primarily or very strategically.

By contrast, only 6% of companies who report low Sales Enablement effectiveness have their functions oriented this same way.



Figure 11: Effectiveness of Sales Enablement by Maturity



Length of Deployment

Length of deployment was clearly a factor in Sales Enablement effectiveness.

A total of 72% of those in our study that have deployed Sales Enablement solutions indicated that it had been in place for less than 5 years.

There's a clear relationship between the "age" of Sales Enablement and its effectiveness. In organizations reporting low effectiveness of the function, 39% have had Sales Enablement in place less than a year versus 12% for organizations where it is effective.

By contrast, in organization's reporting high effectiveness of the function, 39% have had the function in place for more than 5 years versus only 10% for organizations reporting low effectiveness of the function.



Staffing and Budget Impacts

There is no mystery involving staffing. Using effectiveness as a filter, we see that 50% of organizations reporting low effectiveness have no staff assigned to the function which goes against commonly held organizational best practices.

Demand Metric recommends that any organization that wants to see a high Return on Investment (ROI) for Sales Enablement dedicate at least one staff person to the function.

With respect to budget, we see something very similar to staffing. Using effectiveness as a filter, 53% of organizations reporting low effectiveness of the Sales Enablement function also report having no formal budget or an inadequate budget for Sales Enablement

The conclusion Demand Metric drew from all of this data is that where Sales Enablement isn't effective, it seems to be the victim of sloppy management.

We offer a more detailed profile of organizational effectiveness in the Maturity Model portion of the Sales Enablement in Action section of this report.



SALES ENABLEMENT IN ACTION

Implementation

Here, we begin our focus on the implementation and execution of Sales Enablement within the organization. We have identified six steps in the implementation of a successful Sales Enablement model. These are:

1. **Get Approval for Sales Enablement.** This means making it a priority within the organization, getting Senior Management buy-in and dedicating resources to Sales Enablement.
2. **Prepare Your Company.** Focus on Sales Enablement by assessing your organizational readiness and identifying gaps between Marketing and Sales. Pay careful attention to the areas of sales support, organizational alignment, content & assets and missing job functions & skills.
3. **Select Solutions.** Sales Enablement is a fast growing segment of the market and new vendors are appearing every week. We review the top vendors in the market in the Solutions portion of this section.

4. **Create a Playbook.** Your playbook will include the key resources that the Sales team needs to increase sales productivity including customer personas, content, messaging & positioning statements and collateral.
5. **Launch to Sales.** Once all the materials are in place, you can launch to the Sales team. Demand Metric recommends starting with a pilot group of experienced sales reps before rolling it out the entire Sales team.
6. **Measure and Evolve.** It is critical to incorporate success factors into the Sales Enablement initiative from Day One.

Use our [Sales Enablement Plan Methodology](#) for a complete guide to implementing a successful Sales Enablement Model. Additional tools are available in the Action Plan section of this report.



The Enabled Sales Professional

Today, buyers are looking for business partners that will help them drive business results or outcomes, rather than bundle their products/services into “solutions.”

The truly enabled sales professional is one who has been armed by the integration of the processes, practices, technologies and tools of MA, CRM and Sales Enablement applications to do exactly that – partner with the customer.

Figure 12 highlights the workflow of the enabled sales professional. The process flows as follows:

- MA system drives content and brings in lead.
- CRM system identifies type of company, general customer & market challenges and provides solid customer profile.
- CRM provides data for RFP/RFQ & sends to CPQ system.
- Sales Enablement Applications provide the sales rep with the 3-5 things that will make a difference in that specific call. This includes collateral, demo, presentation & mobile access.

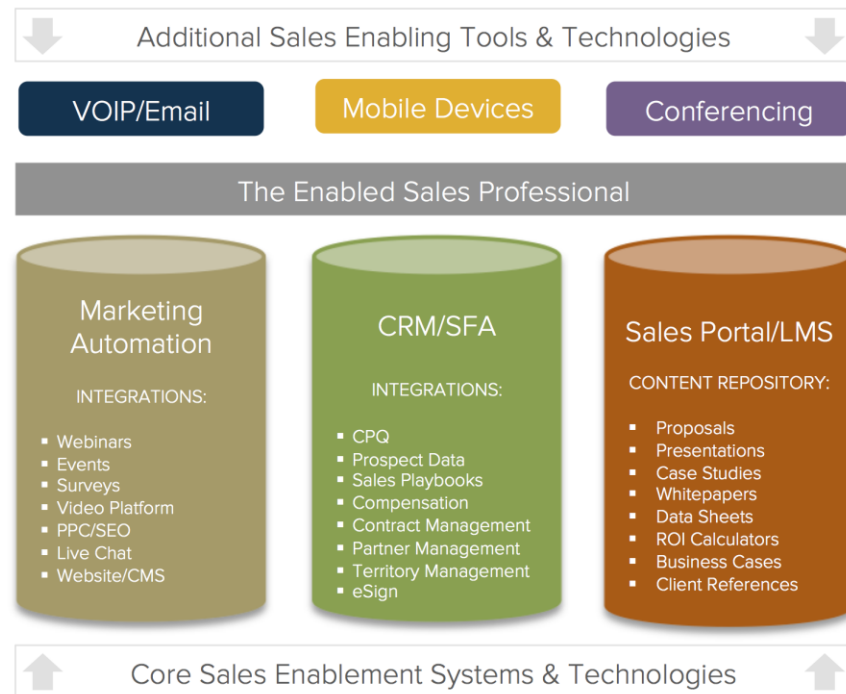


Figure 12: The Workflow of the Sales Enabled Professional



- Sales Enablement Portal offers the sales rep examples of similar customers who have solved that problem, then queues a customer story to the laptop.
- Provides quote and proposal management with e-Signature tools for close.
- CRM system provides metrics on which content types/pieces have the highest close rate.

Maturity Model

Demand Metric's Sales Enablement Maturity Model illustrates the progression of an organization's Sales Enablement initiative across four maturity stages (Undefined, Progressive, Mature, World-Class) against eight key components:

- | | |
|-----------------------------|-----------------------|
| ▪ Orientation | ▪ Sales Support Tools |
| ▪ Leadership | ▪ Process |
| ▪ Technology/Infrastructure | ▪ Metrics |
| ▪ Alignment | ▪ Results |

Demand Metric recommends that you use the model detailed in **Figure 13** (on the next page) to assess the level of maturity within your organization and to chart the course to your next stage of development.

Sales Enablement: Best Practices, Case Studies & Insights

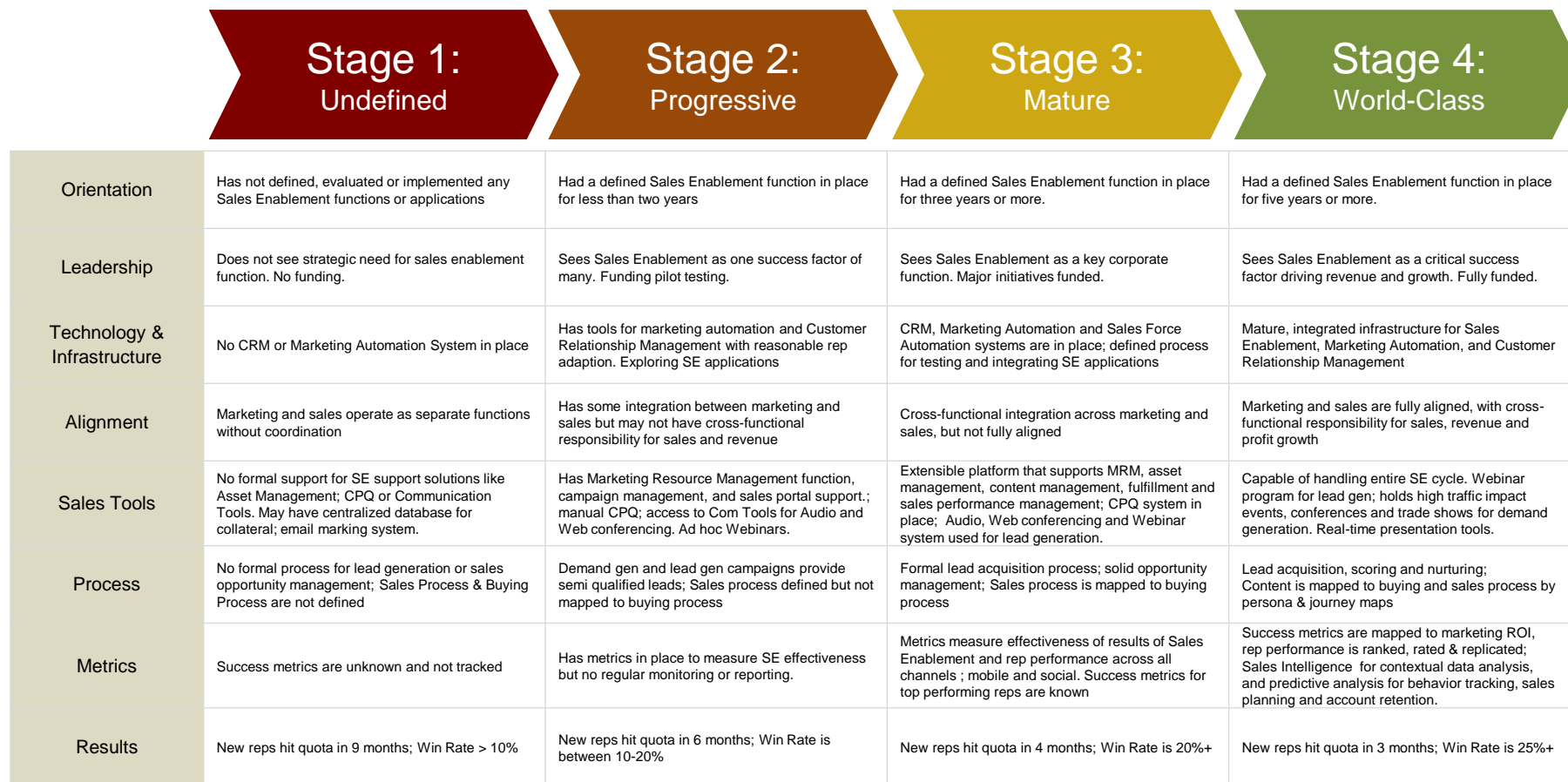


Figure 13: Sales Enablement Maturity Model



Solutions

The Modern Marketing landscape is an ever-changing, ever-evolving environment in which new strategies, technologies, vendors and products appear continually.

Demand Metric Solution Studies provide marketers with a focus on a specific technology solution-set or focus area so that they are armed with the knowledge, information and solutions they need to develop effective strategies and action plans for their organizations. Our Sales Enablement report series includes Solution Studies on:

- [Enablement Knowledge Management \(KM\)](#)
- [Configure, Price, Quote \(CPQ\)](#)
- [Sales Intelligence](#)
- [Customer Relationship Management \(CRM\)](#)
- [Marketing Automation \(MA\)](#)
- [Sales Communications Solutions](#)

Each Solution Study includes a Vendor Matrix, which details key vendors within each category. **Figure 14** provides an “sneak peek” of a Vendor Matrix (Enablement KM). Follow the links listed above to download each of the full Vendor Matrices.

Company	Category	Target Industries	Offerings	Customers
Amacus	Distributed Marketing/Enablement Platform; Metrics (Auto-analytics)	Enterprise, SMB, Government	SaaS-based Sales Support system for Email Marketing with built Auto-analytics for customer response and sales call follow-up; Once a prospect is entered into the Amacus system, the system tracks prospect activities and alerts reps to their interest and level of engagement	Apple Canada, AT&T Wireless, Intrawest, Microsoft, Schenker Global Logistics, Tectura, Terasen Gas, WebEx Communications
Avitage	Content Management System	Demand Management; Content, Field, Product and Channel Marketing	Content Management for Content Strategy and Execution, Content Operations and Video Strategy and Execution	SAP, Teradata, HP, Hitachi Data Systems, Sybase, Exon Mobile, illumine, BNA Software, Exostar, American Marketing Association
Bloomfire	Content/Campaign Management System	Insurance, Financial Services, High Tech, Healthcare, Real Estate, Media, Food and Beverage	Content Management and Social Sharing Knowledge Base	ReMax, Shaw, Etsy, Dominos, esurance, Stryker, Bechtel, Comcast, Kidspot, Travelers, CargoBarn, Kellogg's, LifeSize, Health Smart, McGraw Hill
CallidusCloud	Distributed Enablement Platform	Financial Services, High Tech, Insurance, Pharmaceuticals, Retail, Telecom	Comprehensive Enablement Platform	ADT, Aetna, Amgen, Biznet Software, CDW, Covad, Corning, Fujitsu, HSBC, ING, Konica Minolta, Medtronic, Nationwide, NBA, Novell, Siemens, Telus, Telstra, Unisys, Verizon

Figure 14: Sneak Peek of Enablement KM Vendor Matrix



Case Studies

Sales Enablement has had an immediate impact on the two companies whose case studies we analyzed in detail. Our first case study represents an Internet technology vendor with newly created Sales Enablement function of less than a year that saw an immediate improvement in sales team morale, content for conversion, quote processes and close rates. Our second case study represents a company that provides ethics, compliance and policies management services addressing the major challenge of combining four separate companies into one integrated global corporation.

Case Study #1 - Internet Technology Vendor

- **Situation** – As a fast growing Internet technology supplier, this company had many of the usual growing pains including an alignment issue between the marketing and sales organizations. Marketing and sales had a genuine desire to work together but found that they were often, and unwittingly, working at cross purposes.

Marketing believed the sales force was not making enough effort to follow up on the leads it provided. The sales team felt that marketing was ignoring them. That situation led to the sales reps creating their own ad-hoc marketing materials. This effort led to inconsistent marketing positioning and messaging which created market and brand confusion for the Internet technology supplier.

- **Change Triggers** – The move to Sales Enablement occurred about six months ago. It was triggered by the company reaching a plateau in sales productivity and by new market moves by a more aggressive competitor. The sales team needed new demos and tools and better content to counter this threat, which they could not generate for themselves. Sales also needed a better system than the corporate wiki for accessing them.



- **Move to Sales Enablement** – The company decided to invest in Sales Enablement and entrusted that initiative to the marketing department. The primary focus of the first phase of Sales Enablement is on new and better content development and a better delivery system. The move to Sales Enablement impacted the marketing and sales team in the following ways:
 - **Roles:** A new member was added to the marketing team with the responsibility for implementing a Sales Enablement initiative. This person is assigned to marketing and sits in on the sales meetings.
 - **Responsibilities:** Primarily responsible for supporting the sales team by identifying and fulfilling their content and process needs.
 - **Processes:** Evaluation of the sales cycle, processes and development of new reporting and assessment tools for use by sales team.
 - **Technology & Tools:** Added a sales portal for curating content.
- **Results** – The company has experienced positive results from Sales Enablement. These include:
 - Revenue increase for 2013.
 - Sales productivity has improved especially later in the funnel where more deals are closing.
 - Improvement in sales morale.
 - New and improved content included demos, case studies, white papers, sales playbooks, competitive intelligence and event information.
 - New set of best practices for marketing and sales alignment around objectives, pipeline flow and deal close rates.
- **Key Challenges** – Time and resources constraints prevent the company from moving as fast as it would like toward more Sales Enablement objectives.



- **Future Plans** – This company plans to increase its investment in Sales Enablement. Future plans include:
 - Addition of another content development person for marketing.
 - Investment in improved Web conferencing technology.
 - Investment in contract management software for Configure Price Quote (CPQ).
 - Investment in data management, and account and contact discovery.
 - Plans to put additional success factor metrics and analytics in place within 12-18 months.

Case Study #2 – Compliance Software Vendor

- **Situation** – NAVEX Global, an ethics, compliance and policy management company, is a recently formed conglomerate of four separate companies that previously served this market space. With the large and complex merger occurring, NAVEX Global

undertook an evaluation of all departments, processes, tools and technologies to streamline operations and eliminate redundancies.

A key area of focus was marketing and sales because of the massive changes involved in NAVEX Global's products, services, pricing and customer/market focus.

- **Change Triggers** – Sales Enablement was a key part of the changes NAVEX Global was undergoing as a result of the merger of four companies into one.

All of the four separate companies had some legacy Sales Enablement, but when the four sales teams came together, sales representatives were asked to sell the entire product and service portfolio, and were given new geographical territories. They all had new roles. It was “All hands on deck” for a new Sales Enablement initiative with a combined effort across all departments.



- **Changes to Sales Enablement Function** – As a result of the merger, many critical changes were made to the Sales Enablement function. These included:
 - Integration of legacy systems, which included numerous instances of Marketo, Salesforce.com, Eloqua, a homegrown CRM, and others. Integration occurred across entire company – every function, every group, every system had to change.
 - New, stronger focus on data hygiene and data integrity. Duplicates were deleted and key record types were merged.
 - New workflow processes were developed and training implemented with respect to the creation and management of leads, meetings, opportunities, RFPs, contracts, etc.
 - Integration of two inside telesales agencies into one new workflow and reporting structure.
 - Complete shift in the sales model with sales teams getting new territories and targets.
 - Sales went from selling one product line to selling multiple product lines and needed training and support for new products.
 - Content development, messaging, and content delivery evolved to meet new products, pricing and customer/market focus.
 - Marketing rebranded all legacy collateral, launched a new website, redirected traffic from old websites, developed “Battle Cards,” Product At-a-Glance documents, Sales Pitch Decks, call scripts, product data sheets, new product positioning documents emphasizing use cases, key competitive competencies, and unique differentiators.



- New training systems had to be developed and rolled out to train a distributed sales force on all the new products. Weekly training sessions (sometimes more frequent during the early stages of the merger) are held to ramp key sales and marketing personnel on the latest insights and findings.
 - An email alias and newsletter collecting competitive intelligence was established to gather stories from the front lines reported by sales reps, sales managers, executives, and others who are actively engaged in the marketplace.
 - Before any marketing campaign is deployed, campaign managers communicate with inside and outside sales and management explaining the timing, purpose of the campaign, associated collateral or resources, a summary of the information, how they can use it to engage with key customers and prospects, and expectations around follow up.
 - A complete redesign and implementation of the lead-to-cash workflow involving Marketo and Salesforce.com integration gives sales reps visibility into every action a lead or contact takes from the first time they submit a form, to tracking all interactions on the website, with email, white papers and other collateral, painting a clear picture of what information, products, or services prospective buyers are interested in. Sales enters selling conversations with a clear picture of both the account and all people associated with that account and their complete history of activity.
-
- **Results**
 - Marketing and sales have a stronger partnership. There is clear accountability; clear responsibility and goals. The conversation between groups is easier.
 - Marketing is now speaking the same language as sales.



- While the company had always tracked key metrics like lead volume, flow and conversion rates, now it is focusing on the two most important metrics – Pipeline growth and close on business; the key focus for sales.
- Sales no longer get unqualified leads directly from marketing. They first go to telesales, who then books the appointment with a ready buyer, and they have the info to close. This has changed the quality of sales activity.

▪ Key Challenges

- Underestimated the time it took to integrate groups, bring everything together and execute.
- Had to build out new infrastructure. Incorporated legacy systems of Marketo & Salesforce.com.
- Competing for resources with other changing teams
- Many decisions were made by people not on the frontlines; Would have liked more input from the front.

- Increased focus on Sales Enablement meant that the sales team felt overwhelmed at times with all the new Sales Enablement applications. They had to balance new training requirements and the need to sell product.

▪ Future Plans

- Evolving. The company believes it has the right ingredients and is making the right moves. It's time for buildup, build out and refining; filing the rough edges.
- Change the approach to digital asset management. First approach not effective; trying new approach.
- Started using Chatter from Salesforce.

About NAVEX Global

NAVEX Global helps protect your people, reputation and bottom line through a comprehensive suite of ethics and compliance software, content and services. The trusted global expert for more than 8,000 clients in 200+ countries, our solutions are informed by the largest ethics and compliance community in the world. More information can be found at www.navexglobal.com.



ACTION PLAN

1. Determine your organization's readiness for a Sales Enablement initiative with the following tools with our [Sales Enablement Plan Methodology](#) and our [Sales Enablement Readiness Assessment](#).
2. Gauge your organization's current effectiveness or need for Sales Enablement with our [Sales Support Effectiveness Survey](#)
3. Build a Business Case for your Sales Enablement initiative. Our [Business Case Template](#) will provide you with the basics of building a business case.
4. Organize how your organization with structure the Sales Enablement function. Use our [Sales Enablement Framework](#) to standardize roles & responsibilities for Sales Enablement.
5. Begin building business processes for the Sales Enablement function. Utilize our [Buying Process Stage Template](#) and our [Lead Qualification Process](#) to support your efforts:

buying_process_stage_template.xls [Compatibility Mode] - Microsoft Excel non-commercial use

DEMAND METRIC

Buying Process Stage Template

Persona #1 - The Newbie
Pain Points - Customer Acquisition, Limited Time, Limited Budget

Buyer Stage	Need	Discovery	Consideration	Decision	Review
Description	Identification of problem or opportunity	Search for solutions to problems and/or opportunities	Assessment of alternatives and gather detailed information about solutions	Goal is to purchase the product/service that satisfies the need	Did the purchase accomplish its objective and were any risks realized?
Action	Buyer becomes aware of a problem or opportunity and agrees they have the same problem	Buyer finds our solution and competitive solutions	Buyer evaluates our solution vs. competitive solutions & enters into "trials"	Buyer must make decision to purchase our solution	Buyer reviews product or service and becomes a repeat customer
Questions	Do I need this? What are my requirements?	What differentiates you from your competitors?	Is this solution easy to use? How long will it take to implement?	How can I invest	
Duration	1 Day	30 Days	30 Days	15 Days	On Going

Download

Figure 15: Buying Process Stage Template



6. Define requirements for Marketing and Sales Alignment with our [Sales & Marketing Alignment Tool](#), our [How-To Guide: Starting Out with Sales Enablement](#), our [How-To Guide: Aligned Sales and Marketing Funnel](#) and our [How-To Guide: Achieving Corporate Sales Targets](#).
7. Begin the process of selecting a vendor to assist you in your Sales Enablement initiative with our [Sales Enablement RFP Template](#).
8. Identify the key players in the market. We have already begun this process for you by researching a multitude of quality vendors. You can take a look at the vendors we have reviewed with our [Sales Enablement Solutions Matrix](#).
9. Construct a project plan for implementing your Sales Enablement function with our [Project Plan Template](#).
10. Measure the success of your Sales Enablement implementation and function with our [Sales Enablement Metrics Dashboard](#).

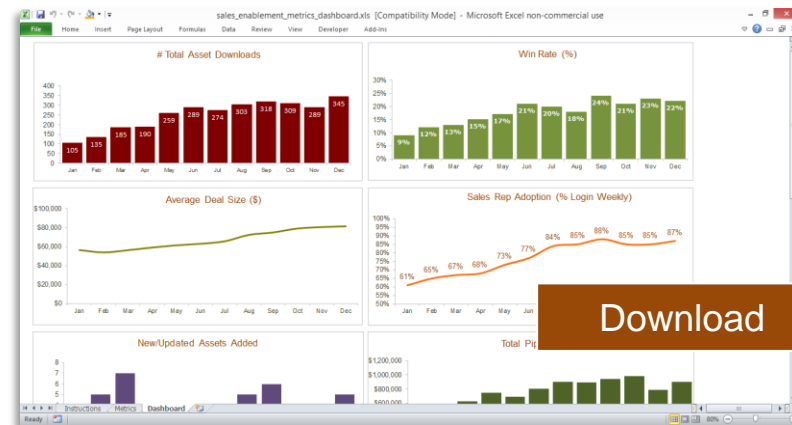


Figure 16: Sales Enablement Metrics Dashboard



ANALYST BOTTOM LINE

Sales Enablement can make a significant and positive impact on the organizations that are employing it, when they do so by following best practices and processes. As Sales Enablement matures in product functionality and process integration across the Enterprise, its role is changing.

As such, Sales Enablement can no longer be viewed as simply augmenting the performance of Sales and Marketing, it must primarily be viewed as supporting the customer journey.

The bottom line shift we see today and into the future is from Sales Enablement to Customer Enablement.



ABOUT THE RESEARCH ANALYSTS



Clare Price, VP Research – Demand Metric

Clare is an expert in marketing strategy, branding, strategic communications, sales enablement, social media marketing, content marketing and leveraging marketing technologies. Clare is a former Gartner Research Director at and helped build their Internet Strategies Services division with clients such as Microsoft, IBM, HP, Cisco, Proctor & Gamble and Wells Fargo. Her specialties include: brand strategy, brand development, customer acquisition and relationship development, content and digital marketing strategy, sales enablement and social media marketing.



Kristen Maida, Research Analyst – Demand Metric

Kristen has worked with Demand Metric for the past 4 years, learning about and gaining experience in all aspects of the organization. She has developed job functions in almost every department to help with Demand Metric's rapid growth. Her specialties include: social media marketing, digital marketing, content marketing & management and business process development.



OUR BEST PRACTICES REPORT METHODOLOGY

Demand Metric's Best Practices Reports investigate new developments and approaches in a given focus area to provide marketers with up-to-date, practical and efficient solutions to modern day challenges. Each guide identifies a challenge, discusses previous solutions to that challenge, presents new solutions based on in-depth research and suggests a recommended approach to implement new solutions.

Each Best Practices Guide involves hours of analyst research, focus area specific surveys and comprehensive interviews with executives in a given focus area in order to recommend solutions for the presented challenges.

ABOUT DEMAND METRIC

Demand Metric is a global marketing research & advisory firm serving a membership community of over 40,000 marketing professionals, CEOs, and business owners with advisory services, custom research & benchmarking reports, vendor studies, consulting methodologies, training, and a library of 500+ tools and templates.

Using Demand Metric resources, members complete projects faster and with greater confidence, boosting respect for the marketing team and making it easier to justify needed resources. Our 1,000+ clients range from start-ups to members of the Global 1000.

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