



E-BOOK

# Power Sales Enablement with a Charter

Create a charter to turn Sales Enablement into a true strategic discipline



## Most large or growing organizations understand the importance of Sales Enablement,

but that doesn't mean they've implemented it effectively.

And effective implementation matters, because organizations that do Sales Enablement right see higher quota attainment rates and higher customer satisfaction ratings.

Maybe your Sales Enablement function has grown in an ad-hoc manner. Or the team is stuck constantly responding to requests and problems, instead of aligning to strategic goals. Or perhaps your Sales Enablement is failing to serve key groups.

A Sales Enablement Charter can help. By taking the time to define a clear charter for your team, you'll position Sales Enablement for long-term success that drives revenue growth.

This ebook will explain what a charter is and the benefits of having one, and provide a step-by-step process for creating a charter for your organization.



# Sales Enablement Charters: The Basics

First, let's be clear what a charter is and is not. It is a blueprint. It is not a tome that details every aspect of sales enablement.

Your charter will be whitepaper-sized, at most. That doesn't mean it isn't weighty, though. The charter is a crisp definition and guide to the future for your Sales Enablement organization. You will reference it regularly and measure success against it.

## At a minimum, the charter will include:

- The mission and high-level goals for your organization
- The audience you serve
- Your executive sponsors
- Clear scope of responsibilities
- The metrics against which you'll measure your Sales Enablement organization's success





## Why create a charter?

A good Sales Enablement charter can convert your undisciplined Sales Enablement efforts into a formal, scalable, and strategic discipline. The data shows that a charter improves results.

### Organizations reap the benefits because a charter helps:

- Align Sales Enablement efforts to corporate goals
- Gain stakeholder support
- Socialize and evangelize Sales Enablement, positioning Sales Enablement for funding, empowerment, and growth
- Build the discipline
- Clarify scope and avoid scope creep, so that the team can stay focused on strategic needs rather than putting out fire drills







## When is the right time to create a charter?

Anytime.

Really.

If you can create one before beginning your Sales Enablement efforts, so much the better. But, in most cases, organizations will already have some informal or even formal Sales Enablement function before they move to create a charter.

### Here are some indicators that it's time to create one:

- You are moving from an informal Sales Enablement organization to a formal one. For example, you are hiring a full-time manager for the team.
- Your Sales Enablement team isn't proving effective. Perhaps they aren't meeting defined goals, or there are no goals defined at all.
- The team is mired in problem fixing and can't make progress on longer-term goals. Especially if your Sales Enablement team is the go-to for "fixes" from every customer and prospect-facing organization, it may be time to create a charter to clarify and narrow the team's scope.

# Step-by-Step: How to Create a Charter

Now that you know why you're creating a charter and what it is, let's deep dive into the process of creating one.

## It will involve three steps:

- **Research**—Understand the goals, needs, and challenges of different teams in your organization.
- **Create your charter**—Draft your charter, gather feedback, and revise to finalize it.
- **Build a plan**—Create an action plan to go along with your charter to establish a clear path for reaching your goals.

Since this is an official project, if you have not already done so, create a RACI chart defining the Responsible, Accountable, Consulted, and Informed people who will be involved in creating and finalizing the charter. It's also a good idea to create at least a simple project plan outlining the phases and timeline for developing your charter.







## Step 1: Research

We recommend that you conduct your research through interviews. You can certainly use other methods in addition, such as surveys or process analysis. But interviews—either individually or in a focus-group setting—will allow you to dig deeper and gain a fuller understanding of goals, processes, challenges, and needs. Obviously, prepare questions ahead of time, but be ready to go with the flow and see where the conversations take you.

### Plan to interview four categories of people in your organization:

- Executive leadership
- Sales management
- Sales representatives
- Cross-functional stakeholders

### Executive leadership

Interview the relevant executive leaders in your company. You are seeking information on two fronts: the executive's view of the company's priorities and the executive's view of his or her team's priorities. At both levels, ask about the:

- Vision
- Mission
- Strategy
- Priorities

Understanding each executive's strategy and priorities for their team is especially important.

## Sales management

Interview sales management to understand their strategy and priorities, as well as their sales revenue and targets. Then, dive deep into the current state of sales execution. Understand their processes, challenges, and identify the gaps that exist in current sales execution. This will be a terrific springboard for determining what to include in your charter. Aim for breadth and depth.

When you identify the sales managers to interview, don't forget to consider your indirect sales channels and extended sales forces. In Financial Services, this might be your financial advisors. In other industries, it could be your distributors, resellers, VARs, etc. Talk to the leaders of these channels, such as the Partner Services manager. Any team that is selling and relying on your organization should be interviewed.

## Sales representatives

Obviously you won't interview every sales representative, but pick a reasonable subset to meet with. Include some senior representatives and some newer ones, and include representatives from across the different groups (inbound and outbound, for instance). Get a good sample size based on the size of your sales organization.

If yours is a larger organization, you may want to interview some people individually and use those interviews to refine your question list. Then conduct focus groups to gather further information in a time-effective manner.

Your goal is to understand the seller's day-to-day life, what's going well, and most especially, where there are pain points. You may find these pain points vary by seller maturity and functional group. Take good notes because solving these problems will be key to success.





## Cross-functional stakeholders

Finally, plan to interview the leaders of relevant cross-functional teams, such as: marketing, customer success, finance/legal if they are significantly involved in sales, and other teams that support your sales force, such as Marketing and Customer Success. If most sales involve a deliverable or service from another team, that team should be on your list of interviewees.

You will want to understand the current processes that touch sales and understand what each of these other teams needs in order to be successful. You may find it helpful to diagram some of these processes and interactions for future reference. Knowing where there are pain points or efficiencies to be gained will help you define the scope of your charter and a strategy for improving sales enablement.





## Step 2: Develop the Charter

All your research now goes into developing a charter. You'll use a typical document development life cycle of brainstorming, outlining key points and reviewing them, drafting the charter, and then reviewing and revising it.

It's up to you how you work as a team to draft your charter. Just make sure you include all relevant parties in drafting/reviewing the drafts. And are clear on who is the final sign-off on your charter.



## Pick a template and modify as needed

Here is an example of a template for a Sales Enablement Charter. For the remainder of this ebook, we'll assume you're using this template, but a simple web search will reveal other ones. What's important is that you treat any template as just a guide; modify it as needed to fit your organization's requirements.

Section	Description
<b>Audience</b>	<ul style="list-style-type: none"><li>• Roles/personas Sales Enablement will support, e.g. all quota-carrying sales reps</li></ul>
<b>Business Goal/Strategies</b>	E.g. Grow FY20 revenue to \$X million Grow market share in [product/industry category] by X%
<b>Sales Goals/Strategies</b>	E.g. Achieve \$X/X% revenue from top 50 key accounts Achieve \$X/X% revenue from net new customers
<b>Mission</b>	E.g. Build a robust, best-in-class framework covering sales talent recruitment, skills development, process, content, technology and insights to achieve revenue targets, increase sales productivity and drive sales performance.
<b>Enablement Goals/Objectives</b>	E.g. Hire and onboard XX new sales reps by [timeline] Deploy new sales enablement platform by [timeline]
<b>Metrics</b>	<ul style="list-style-type: none"><li>• Program-based metrics - time to first deal, time to productivity, etc.</li><li>• Sales metrics e.g. win rate, quota attainment, pipeline increase</li><li>• ROI on program and tech investments</li></ul>
<b>Executive Sponsors and Key Stakeholders</b>	<ul style="list-style-type: none"><li>• Executive(s) providing program and funding support</li><li>• Cross-functional colleagues who would contribute to SE activities and vested in its success</li></ul>
<b>Scope</b>	<ul style="list-style-type: none"><li>• Sales Enablement capabilities and services your team will own, provide and manage e.g. Sales content management system, creation of sales guides, battlecards, sales onboarding, role-based coaching</li></ul>



## Audience, Stakeholders, and Sponsors

You have one obvious audience: Sales. You will deliver products and services to Sales, for certain. But, increasingly, Sales is not the only audience for Sales Enablement programs. The trend is for Sales Enablement to support other customer-facing teams, such as Marketing, Customer Success, and Channel Partners.

That's fine. Just be clear about which teams you will and won't support.

This is the time to set boundaries. Later, you may get questions or requests from various teams, especially if your program becomes successful. When a team approaches you and asks, "where is xyz", you should be able to reference your charter to determine if their request falls within your area of responsibility or not.

You will have limited budget and resources. Make sure you establish an audience only wide enough for you to support with those resources. And make sure that your audience is one that you truly can support, based on the research you've done and the goals and mission you've established.

As well as your core audience, your charter should note all executive sponsors. **Remember that 90% of Sales Enablement leaders have a c-suite champion for their program.<sup>1</sup> Executive sponsorship is critical to success.**

Also include stakeholders who are outside of your audience, but who are still critical to success. Make note of the teams whose work interlocks with that of your Sales Enablement team, such as Finance/Legal or Deployment Teams.

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<sup>1</sup><https://seismic.com/sales-enablement-maturity-index-study/>







And use the **SMART approach**, creating goals that are specific, measurable, achievable, realistic, and time bounded.

## Goals and Mission

Start with goals. Consider three types of goals:

- **Business goals**—The overarching goals for your business. For example, growing market share by a certain percentage or becoming a leader in your category.
- **Sales goals**—The specific goals for your Sales organization, as that is your key constituency. For example, increase revenue by X percent or grow net new customers in specific segments by a certain number.
- **Sales enablement goals**—The goals for your Sales Enablement organization itself. Such as onboard a certain number of new sellers in a given time period or deploy a new Sales Enablement platform by a specific date.

A few things to consider. First, keep your goals to three to five for each category. Word them as action items using an imperative. I.e., “Deploy x” or “Grow y.” And use the SMART approach, creating goals that are specific, measurable, achievable, realistic, and time bounded.

You will likely find the Sales Enablement goals hardest to derive. You can come up with these goals by looking at the business and sales goals first, and then considering what it will take to achieve those goals. Those become the goals for your Sales Enablement organization. Also, make sure to review the information you gathered about pain points and needs. Take a first stab at these Sales Enablement goals, but be prepared to come back and revise them as you draft your charter further.

Once you have established your goals, draft your mission statement. Keep it succinct and use it to establish the areas that your organization will be responsible for. Shoot for a feasible, precise, and—if possible—memorable or snappy statement.

## Metrics

Now that you know what you are trying to accomplish, you can establish the measurements of success. Specify metrics at three levels:

- **Program**—How will you know that your Sales Enablement program is successful? These metrics should correlate roughly with your Sales Enablement goals. Based on your goals, you might use the number of people you've trained as a metric, for instance.
- **Sales**—Establish the metrics for measuring sales. These metrics correlate roughly with your Sales goals. For example, you might measure win rate, revenue performance, or quota attainment.
- **ROI**—Define the measure of your return on investment. Your Sales Enablement program will cost money (and time and people power). How will you measure the business value generated by the program? For example, time savings for sellers finding and sending content or reductions in the ramp up time for new sellers.







## Scope

Finally, to the meat of your charter: the scope section. This is where you take all the information you've gathered as well as the high-level goals and define what you will actually do as a Sales Enablement organization. Well, in summary. The scope, for the purposes of the charter, should be high level and crisp, but also specific.

Your scope is important to get right. Like audience, the scope is a boundary setting tool that clarifies what your team is responsible for—and what it's not responsible for. Success is only possible if you are clear about what you will accomplish and if your scope aligns with your goals, mission, and audience.

Break the scope down into two parts:

- **Services**—"What" you will deliver. For example, training, coaching, collateral, systems such as CRMs, etc.
- **Capabilities**—"How" you will deliver it. For example, processes, governance models, infrastructure.

Of course, the two areas, services and capabilities, work together. You need the capabilities in order to provide the services. Defining the scope clearly and breaking it out in this way will make it easier to move to project plans as you evaluate how to get the capabilities in place to deliver those services.

## Step 3: Build a Plan

You've done it. You've built a charter and your team is in agreement on it. Before you go to your executive sponsors and stakeholders, though, you should complete one other element: a plan. It's the first thing these folks are likely to ask for after you present your charter, so it's best to prepare it now and have it handy.

Your plan doesn't have to be a full blown project plan. For this purpose, you simply need what's often called "a plan on a page." Here's an example:

Phase	Timeline	Sales Enablement Capabilities	Sales Enablement Services
Phase 1	Q2FYXX	<ul style="list-style-type: none"> <li>Conduct content audit in partnership with Marketing by [timeline]</li> <li>Build sales onboarding plan</li> <li>Evaluate and select sales enablement platform and sales portal solution</li> <li>Define ongoing training plan</li> </ul>	<ul style="list-style-type: none"> <li>Define job descriptions and competency maps for SDR and Account Manager roles</li> <li>Support hiring XX SDRs and XX Account Managers by [timeline]</li> <li>Deliver product/service brochure in partnership with Marketing by [timeline]</li> <li>Develop role-based call scripts by [timeline]</li> <li>Deliver pitch deck in partnership with Marketing by [timeline]</li> </ul>
	Q3FYXX	<ul style="list-style-type: none"> <li>Deploy sales content portal and onboard 100% sales hires on new portal by [timeline]</li> <li>Define standardized sales methodology</li> </ul>	<ul style="list-style-type: none"> <li>Develop Sales Playbook by [timeline]</li> <li>Roll out sales onboarding program to all new sales hires by [timeline]</li> <li>Automate QBR and sales proposals for all product lines</li> <li>Achieve 100% certification of new sales hires end of quarter</li> <li>Deploy and train 100% of sales reps on sales methodology</li> </ul>
Phase 2	Q4FYXX	<ul style="list-style-type: none"> <li>[Insert goal/milestone]</li> <li>[Insert goal/milestone]</li> </ul>	<ul style="list-style-type: none"> <li>[Insert service deliverable]</li> <li>[Insert service deliverable]</li> </ul>





Use whatever timeline works best for you: quarters, half years, multiple years. The important part is to move your capabilities and services into a timeline to show what you will deliver and when. Be realistic and consider the resources you have available. (You may want to footnote your assumptions.)

One reason to keep your plan separate from your charter is that your plan is more likely to change. Dates may slip, priorities may shift, budgets may expand or contract. These will all impact your plan. However, your charter should remain the same. That's because when you deliver on items may shift, but the goals and mission should be fairly static. Hence, the plan is a separate document from the charter.





## Your Charter: You've got it, now use it

Now that you have your charter and plan, you should present it to your sponsor and stakeholders for final approval. You can present them together to demonstrate an integrated approach to turning your Sales Enablement organization into a formal, strategic, and disciplined organization.

Post the charter where it is highly visible. Don't forget to set up the tools to measure success as per the metrics in your charter. Check back regularly to determine progress against your goals.

Now that you've done the research and planning, your charter should be your north star, guiding your actions and decisions. It's something you should socialize with your audience, stakeholders, and cross-functional teams. That way, everyone knows which way you're steering, and hopefully gets on board. With a solid charter and everyone committed, you're sure to succeed.





## About Seismic

Seismic is the industry-leading sales enablement and digital sales engagement solution, aligning go-to-market teams and empowering them to deliver engaging buyer experiences that drive growth. Seismic's Storytelling Platform™ delivers innovative capabilities for marketers to orchestrate content delivery across all channels, and for sellers to engage with prospective buyers in a compelling, resonant manner at every step of the buyer journey. More than 700 enterprises including IBM and American Express have made Seismic their sales enablement platform of choice. The Seismic Storytelling Platform™ integrates with business-critical platforms including Microsoft, Salesforce, Google and Adobe. Seismic is headquartered in San Diego, with offices across North America, Europe, and Australia.

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