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Acknowledgments

We would like to thank all of the sales professionals who shared their insights around the challenges their sales teams face in today's challenging world of sales. Sales enablement is addressing those challenges through sales training, content management, sales team coaching, and technology. Without their support and insights, the development of this research knowledge base used to create the 2016 Sales Enablement Optimization Study would not be possible.

Next, we would like to thank the following thought leadership companies for their partnership and insights into how sales enablement can help companies sell with a sustainable competitive advantage. We acknowledge Brainshark, Seismic, and Showpad for their forward thinking ideas.

We would also like to recognize Social Centered Selling and PeopleLinx that helped us formulate compelling social engagement questions for our survey and helped us review and understand the data.

Finally, we would like to thank our editing team whose hard work, diligence, and endless hours made this project possible. Thanks to Paul Maxwell, Diane Hodges, Melissa Paulik, and Andy Jesmok.

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INTRODUCTION

"War is 90% information!"
—Napoleon Bonaparte

Roughly 300 years ago, Napoleon made the above observation about competing in battle. Fast forward to today, and one can make a compelling argument that the same holds true for competing in sales in the global marketplace. With collapsing product life cycles, companies can no longer count on their products to be their *sustainable* competitive edge. So, in addition to focusing on *what* they sell, they are now placing more attention on *how* they sell. This trend has given rise to the emergence of a new discipline within sales organizations: sales enablement.

In 2013, we started asking participants in the CSO Insights Sales Performance Optimization Study: *Does your company have a dedicated sales enablement person(s), program, or function to support your sales organization?* The chart to the right shows the continuing growth of sales enablement adoption from the past four Sales Performance Optimization Studies. While we continue to find that more companies dedicate resources to optimizing how their sales teams sell, through our benchmarking efforts, we have also discovered that this discipline is designed in a variety of different ways.

Percentage of Companies That Have a Sales Enablement Function

Year	Percentage
2013	19.3%
2014	22.6%
2015	25.5%
2016	32.7%

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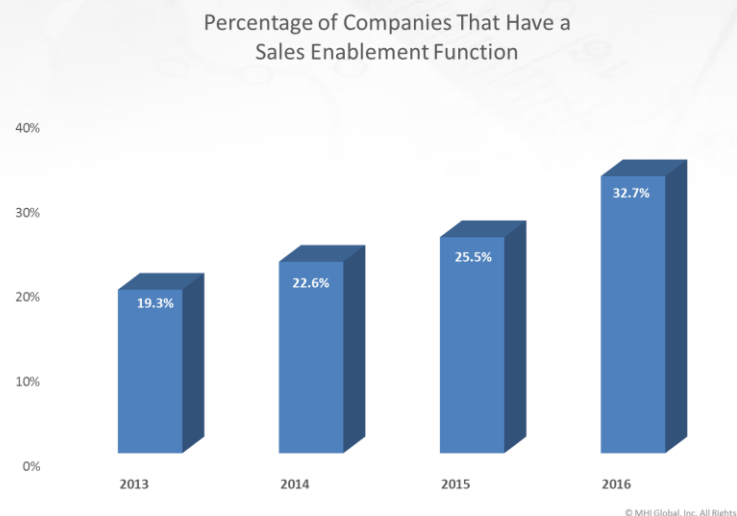
To further understand how sales enablement is evolving and to determine the best practices for ensuring sales enablement has the best possible impact on sales results, CSO Insights launched our inaugural Sales Enablement Optimization Study in 2015. We used that report to present our definition of what this discipline should entail within a company:

Sales Force Enablement: A strategic, cross-functional discipline
designed to increase sales results and productivity
by providing integrated content, training, and coaching services
for salespeople and frontline sales managers
along the entire customer's journey,
powered by technology.

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We have further broken down this definition into a line-by-line analysis of each of the digestible components. To review this in more detail, download the CSO I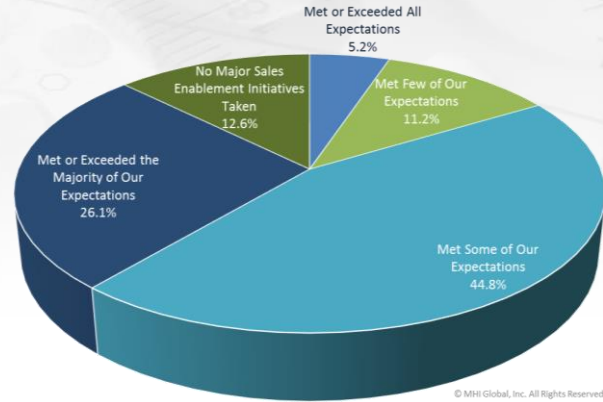nsights Research Note: Sales Force Enablement Definition (membership required). With increasing maturity, sales enablement evolves into sales force enablement, which is the foundation for our definition.

Focusing on line two of the definition, we see an objective that nearly all sales organizations want to achieve; *increase sales results and productivity*. While easy to say, many companies find it hard to achieve.

The chart to the right shows a breakdown of the input we received when we asked companies to assess the outcome of the sales effectiveness initiative(s) they implemented during the past two years. Only 31.3% of companies achieved all, or at least a majority, of the original expectations.

Outcome of Sales Enablement Initiatives over the Last 2 Years

- Met or Exceeded All Expectations 5.2%
- Met Few of Our Expectations 11.2%
- No Major Sales Enablement Initiatives Taken 12.6%
- Met or Exceeded the Majority of Our Expectations 26.1%
- Met Some of Our Expectations 44.8%

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Moving on to the remainder of the definition, we first establish that a key cornerstone of success is the information shared with the sales organization in the form of content, training, and coaching. We then determine who needs to be given access to this information and that it needs to be tailored not to the company's journey, but rather the customer's. Finally, we note that we have to leverage technology if we are going to provide sales teams with on-demand access to that information from wherever they are.

Now, it would be great if sales force enablement could create a framework for the sales organization, populate it with all the information that sales teams need to execute effectively, get everyone up to speed on the new process, and declare victory! But that is not the reality of the world we live in today.

Assessment of Change Impacting Sales Organizations

	Increasing Modestly	Increasing Noticeably	Increasing Significantly
Customer Expectations	33.5%	41.1%	11.3%
Competitive Activity	34.4%	33.8%	11.4%
Customer's Marketplace	38.5%	28.4%	8.2%
Breadth of Your Product Line	39.0%	25.8%	8.8%
Complexity of Your Product Line	33.0%	28.3%	10.7%
Rate of New Product Introductions	41.5%	20.8%	5.3%

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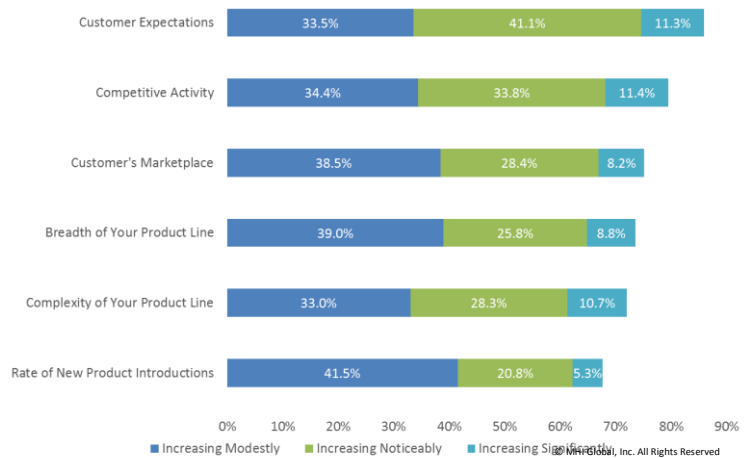
As part of our enablement research efforts, we introduced *change* into the equation. To do this, we asked the study participants to assess the types and scope of change that are impacting their sales organizations.

This chart makes it clear that enablement is not a "one-and-done" event. Rather, sales force enablement must constantly update the company's responses to changes in the marketplace, which will require providing sales with a constant stream of new or improved information.

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To better understand how best to accomplish all of this, the CSO Insights 2016 Sales Enablement Optimization Study looked at how enablement is evolving to meet the needs of sales teams and where it needs to go next. The data and analysis we share in this report are based on input from the first 400 survey respondents. We are continuing to gather more data to support the development of industry-specific benchmarks. By way of study demographics, the following two charts break down the participation based on regions and revenues.

Study Participants by Region
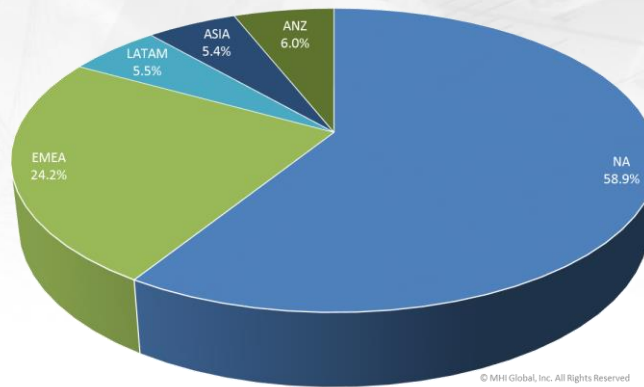
- ANZ 6.0%
- ASIA 5.4%
- LATAM 5.5%
- EMEA 24.2%
- NA 58.9%

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Study Participants by Revenue

- >$1B 14.4%
- $251M - $1B 12.1%
- $51M - $250M 14.4%
- $10M - $50M 16.7%
- <$10M 42.5%

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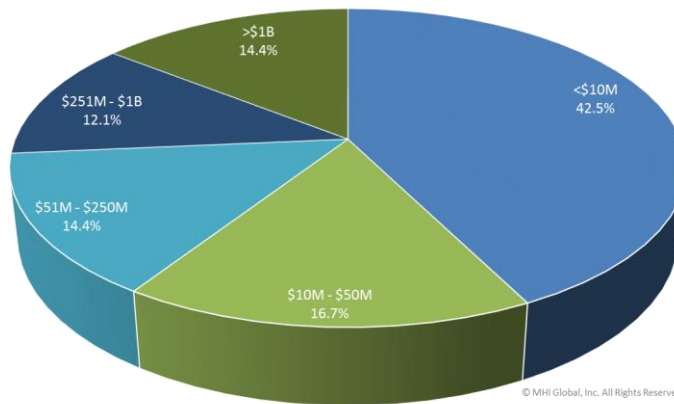
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To kick off the study, we looked at the reporting structure for sales enablement in the companies that have already established that function. In the chart to the right, we see that for the vast majority of organizations, this is a new function that reports to executive sales management versus being an extension of sales operations, marketing, training, etc.

Sales Enablement Reporting Structure

- Training/L&D 3.2%
- Other 7.5%
- Marketing 7.6%
- Sales Operations 20.9%
- Executive Sales Management 60.8%
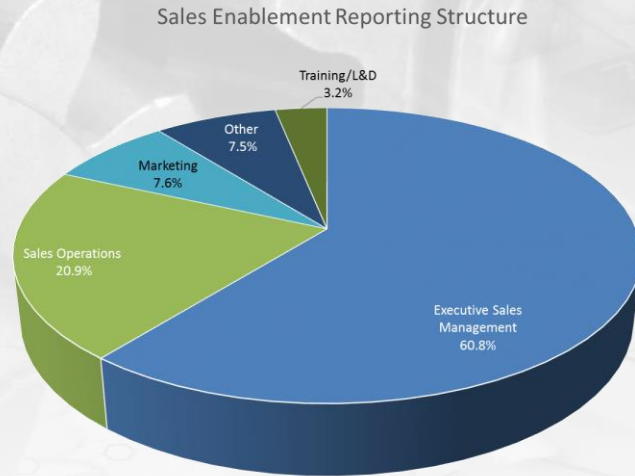
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Let's examine the key findings that surfaced from this year's analysis. In addition to this report, a chart set with the answers we received to all the key survey questions has been created for those looking for more data beyond the areas we cover here.

As you read this analysis, we encourage you to make notes regarding the areas where your company is underperforming. Advisory Services clients have direct access to their CSO Insights analyst, and we encourage you to use this service. Contact us if you have questions or comments regarding this report or to discuss how to refine your enablement strategy and maximize your sales enablement budgets.

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CHAPTER 1: SALES PRODUCTIVITY GOALS ANALYSIS

When we asked the 2016 Sales Enablement Optimization *Study* participants what their top objectives were for this year, increasing revenues was number one and was cited by 68% of the study participants. While this is a common theme for many sales enablement programs, our study found that there are many opinions about what should be done to achieve those higher revenue targets. This is a result of the lack of universal standards in the world of sales. As companies vary widely regarding "how" they sell, strategies and tactics for increasing sales effectiveness (and how they are implemented) vary as well.

Sales Enablement Productivity Goals Have a Broad Scope

We added a new question to our 2016 study to begin to identify the specific sales productivity initiatives companies are implementing. The chart to the right summarizes the responses we received.

Reducing new salesperson ramp-up time heads the list. The 2016 Sales Performance Optimization Study surfaced reasons behind this. The average turnover rate is currently 16.3%,

Sales Enablement Productivity Goals

Goal	Percentage
Decrease New Salesperson Ramp-up Time to Full Productivity	44.9%
Increase in Available Selling Time	39.2%
Improve Salesperson/Client Communications	33.5%
Streamline the Opportunity Management Process	30.4%
Reduce Admin Burden on Salespeople	29.1%
Improve Visibility Into Buyer Intent	27.8%
Improve Salesperson/Sales Manager Communications	22.2%
Reduce Cost of Sales	20.9%
Improve the Ability to Collaborate with Other Functional Areas in the Company	16.5%
Streamline the Forecast Process	14.6%
Decrease in Content Search Time	7.6%
Decrease in Client Interaction Preparation Time	5.1%

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and 67.3% of sales organizations are planning to add net-new salespeople. When you consider that 40.2% of respondents reported a ramp-up time of greater than 10 months, getting new salespeople fully productive more quickly is paramount. We will explore more regarding onboarding in Chapter 6.

Increasing selling time came in second on the list. Currently, salespeople are spending 35.9% of their time selling, with the rest of their week consumed by other tasks. But more selling time is just half the equation. Salespeople don't just need to make "more" calls, they need to make "great calls" as well. Item three on the chart shows the need to improve salesperson/client communication. In Chapter 7, you will see the content challenges hindering the achievement of this goal.
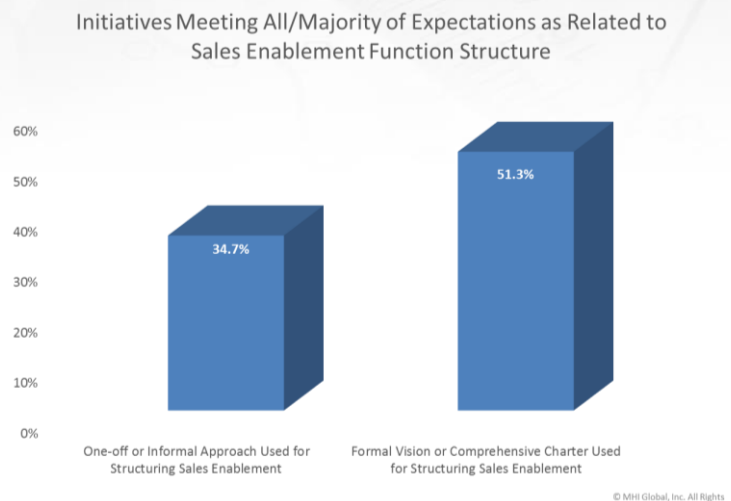
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Formalizing Your Sales Enablement Charter Sets the Stage for Success

In considering best practices for optimizing goal setting for your sales effectiveness initiatives, far and away, number one is to consider/reconsider how you approach sales enablement. The following is a breakdown of the percentage of study participants who reported using one of the four different types of approaches:

- Treat Sales Enablement as One-off Projects: 9.6%
- Have an Informal Sales Enablement Vision: 39.5%
- Have a Formal Sales Enablement Vision: 35.7%
- Have a Formal Sales Enablement Charter (that covers vision, services, road-map, and success metrics): 15.3%

There is a 50/50 split between companies that have implemented a formal structure around sales enablement and those that have not. Our study shows that formality matters. The chart to the right compares the success of sales effectiveness initiatives implemented over the past two years to the organization's approach to structuring the sales enablement function. Here we see the odds of success increase noticeably with a more formal approach.

Initiatives Meeting All/Majority of Expectations as Related to Sales Enablement Function Structure

34.7% — One-off or Informal Approach Used for Structuring Sales Enablement

51.3% — Formal Vision or Comprehensive Charter Used for Structuring Sales Enablement

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A second recommendation for goal setting is to determine the expected effort/projected payback for each of the initiatives under consideration. The CSO's Guide to Transforming Sales provides a field-tested methodology for how to accomplish this task to ensure you focus your sales enablement efforts on successfully overcoming the right challenges facing your sales teams. Refer to the following for additional resources to leverage in your sales enablement planning and execution:

- Blog: Enablement: Setting the Right Priorities
- Blog: Do You Need an Enablement Charter?
- Research Note: Creating a Sales Force Enablement Charter (membership required)

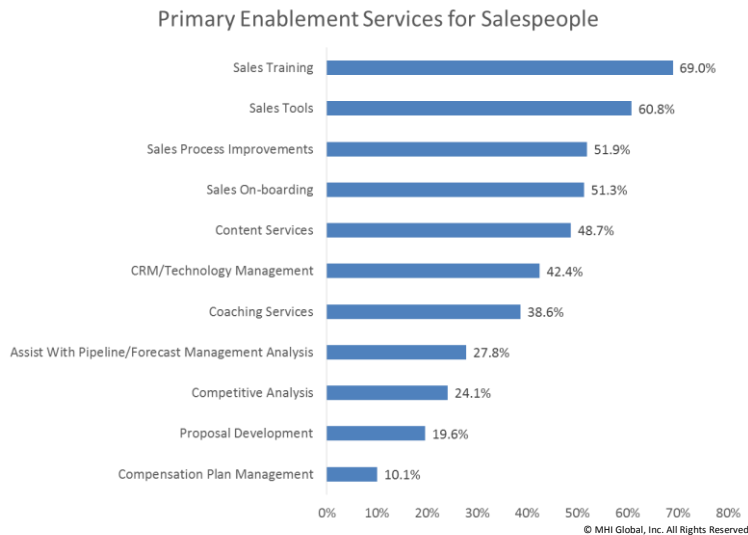CSO INSIGHTS
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CHAPTER 2: SCOPE OF SALES ENABLEMENT SERVICES

When we asked the 2016 Sales Enablement Optimization Study participants to identify the user communities they are focusing their efforts on this year, we found the following breakdown of responses:

- Salespeople/Account Managers   94.3%
- Frontline Sales Managers   63.1%
- Business Development   54.8%
- Higher Level Sales Managers   50.3%
- Presales/Sales Engineers   45.9%
- Marketing Personnel   38.2%
- Channel Personnel   34.4%
- Services Personnel   22.3%

These figures are generally in line with the results of the 2015 study. This then prompted us to seek to better understand the scope of services in which sales enablement is involved.

Meeting the Needs of Sales Professionals and Managers is Required

Primary Enablement Services for Salespeople

Service	Percentage
Sales Training	69.0%
Sales Tools	60.8%
Sales Process Improvements	51.9%
Sales On-boarding	51.3%
Content Services	48.7%
CRM/Technology Management	42.4%
Coaching Services	38.6%
Assist With Pipeline/Forecast Management Analysis	27.8%
Competitive Analysis	24.1%
Proposal Development	19.6%
Compensation Plan Management	10.1%

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The chart to the left profiles the primary sales enablement services in which sales enablement programs or functions are involved.

Sales training is again the top service offering. This includes education on products, sales process and methodologies, selling skills, value messaging, social selling, etc. We explore the effectiveness of training services in Chapter 8.

Sales tools include aids for value justification, ROI analysis, configure/price/quote, etc. These, along with content services (which we dive deeper into in Chapter 7 are two of the key assets salespeople use to engage customers. CRM/technology is also part of the scope of services for many sales enablement functions.

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Primary Enablement Services for Sales Manager

Service	Percentage
Provide Sales Management With Enablement Analytics and Metrics	61.3%
Specific Sales Coaching Skills Development	54.8%
CRM/Sales Analytics Technology Management	50.3%
Assist With Pipeline/Forecast Management Analysis	49.7%
Dedicated Sales Manager Development Program	33.5%
Compensation Plan Management	20.6%
Recruiting Support	18.1%

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This year, we expanded the survey to assess the scope of services sales enablement provides to sales management. The chart to the left summarizes the input of these new findings.

When you think about the people who are coaching your sales teams, it begs the question: Who is coaching the coach? Here we see sales enablement step in to become part of the support network sales management turns to for help in elevating their skills and competencies.

Best-In-Class Programs Take a Holistic View of Sales Enablement

Adding all of these services together shows the wide variety of support activities with which sales enablement is tasked. By benchmarking best-in-class sales enablement programs and functions, we identified two key trends that make them successful. The first is that they take a holistic view toward sales enablement.

For example, sales enablement may decide changes need to be made to the sales process based on changes in the competitive landscape. As sales enablement considers these changes, they must also take into account the other implications this change may have for the sales organization. Will changes in the sales process require changes in their CRM system to monitor the new process? What new content and knowledge will need to be developed to help salespeople execute the new process? How will coaching need to evolve to help reinforce the process changes? By taking this holistic approach, they

People | Technology
Process | Skills & Knowledge

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make sure they identify and consider all the aspects of people, process, technology, skills, and knowledge that a single change may impact.

The second practice is that best-in-class functions don't try to do everything all at once. Instead, while they may identify multiple things that need to change, they select a few and successfully implement them; then select a few more, and so on.
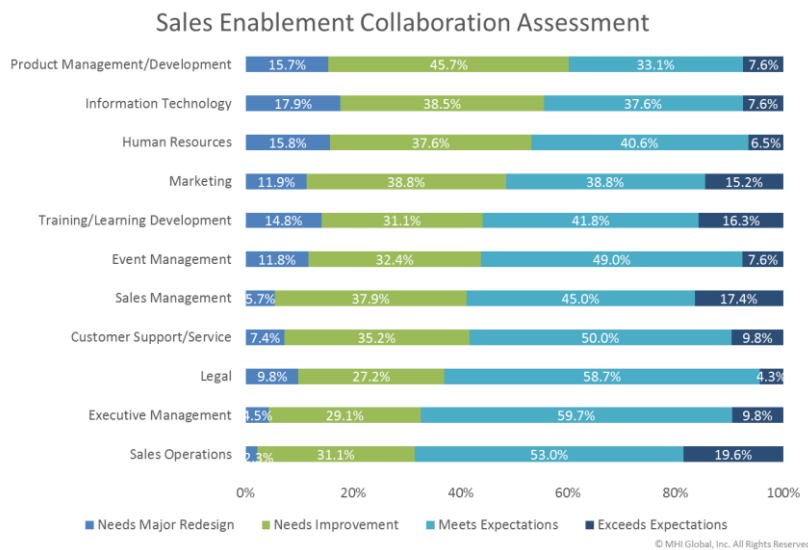
CHAPTER 3: CROSS-FUNCTIONAL COLLABORATION

In the previous two chapters, we looked at the objectives sales enablement wants to achieve and the types of services they can leverage to do so. But knowing what you want to do must be followed up with actually doing it, and that requires people. Data presented in the introduction of this report show that, of the study participants that had an enablement function in place, 69.4% reported that it was staffed by a team of three or fewer people. For half of that group, sales enablement was basically a one-person operation. Expecting a few resources to accomplish a wide range of challenging objectives is unrealistic.

As we consider the other internal resources available that could, or already are, contributing to increasing the efficiency and effectiveness of the sales organization, we see a road to success. Sales force enablement does not have to play all the instruments, but can instead, via cross-functional collaboration, conduct the orchestra. It can focus on ensuring that other key areas work in concert with each other to achieve the desired results. That prompted us to assess what types of collaboration are taking place and how effectively these groups are working with sales force enablement.

### Sales Enablement Needs the Help of Many Functions to Succeed

When asked about methods used to foster cross-functional collaboration between enablement and other parts of their company, 9.6% of participants in our study reported no cross-functional collaboration, 27.1% reported that collaboration takes place on an ad hoc basis, 42.7% have an informal collaboration in place, and 21.% have a formal process for collaboration.

Sales Enablement Collaboration Assessment

	Needs Major Redesign	Needs Improvement	Meets Expectations	Exceeds Expectations
Product Management/Development	15.7%	45.7%	33.1%	7.6%
Information Technology	17.9%	38.5%	37.6%	7.6%
Human Resources	15.8%	37.6%	40.6%	6.5%
Marketing	11.9%	38.8%	38.8%	15.2%
Training/Learning Development	14.8%	31.1%	41.8%	16.3%
Event Management	11.8%	32.4%	49.0%	7.6%
Sales Management	5.7%	37.9%	45.0%	17.4%
Customer Support/Service	7.4%	35.2%	50.0%	9.8%
Legal	9.8%	27.2%	58.7%	4.3%
Executive Management	1.5%	29.1%	59.7%	9.8%
Sales Operations	3.3%	31.1%	53.0%	19.6%

Going further, we asked the study participants to assess how effectively sales enablement collaborated with specific functions within their company. In the chart to the right, we see a mixed bag of ratings. For four areas – product management or development, information technology, human resources, and marketing – more than 50% of study participants gave themselves a grade of "needs a major redesign/needs improvement."

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Enablement Initiatives Meeting All/Majority of Expectations as Related to Cross-functional Collaboration
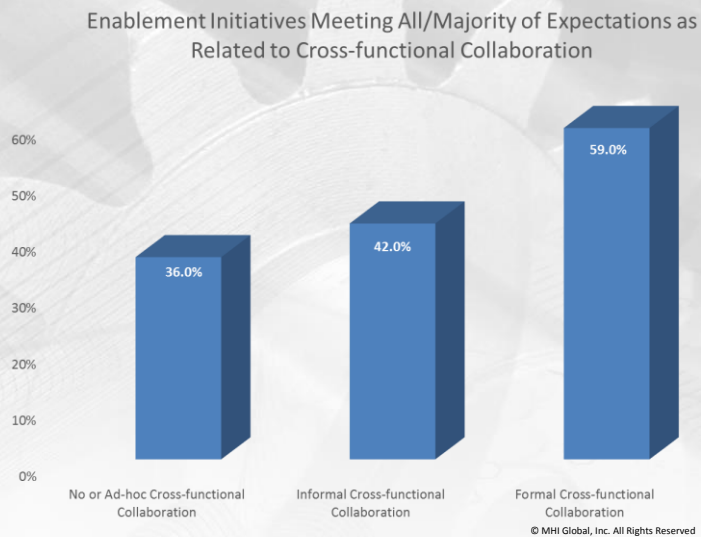
The chart to the left shows collaboration can have a significant impact on enablement success. For companies that had no or ad hoc collaboration, only 36% reported that the sales effectiveness initiatives they implemented over the past two years achieved all or the majority of their original objectives.

That percentage increased to 42% for organizations with informal collaboration and further jumped to 59% for organizations with a formal collaboration process.

Clearly Defining Responsibilities is the First Step to Collaboration Success

Kevin Joyce, a sales and marketing leader in the technology industry, shared the following on effective collaboration. "When there is not a crisp definition of what people should do, they will gravitate to what they want to do. As a metaphor, I refer to this as 'swarm ball.' If you ever have any children that play soccer under the age of 10, you know what I am talking about. The entire organization basically swarms around the ball and the ball is whatever the issue is at that moment."

"When I share this image with my organization, I make it clear that this has to change. Like players on a professional soccer team, they need to focus on consistently playing their defined role. They have to transition from swarm ball to an environment where they're a wing, a center or a goalie. They play that role and just trust that the ball is going to be passed along to them at the appropriate moment, in the appropriate manner."

To help you understand and define those roles, we encourage you to complete the Sales Process Mapping exercise outlined in detail in the CSO's Guide to Transforming Sales.
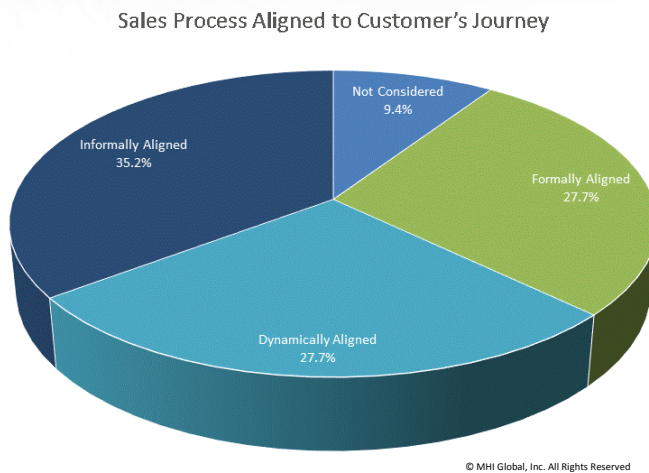
Refer to the following resources to help foster effective collaboration between sales enablement and other functional areas in your company:

- Blog Post: Collaboration in Enablement: Potential for Huge Performance Improvement
- Research Note: Enablement: Collaboration and Performance

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CHAPTER 4: THE RELEVANCE OF CUSTOMER'S JOURNEY ALIGNMENT

The most important decision for every sales organization is still the customer's buying decision. This decision is the prerequisite for sales organizations to achieve their revenue targets. The buying decision is based on the customers' approach to tackling challenges, making buying decisions, and implementing and using a vendor's products and services. It's their customer experience that determines whether or not there will be a follow-up purchase with the same vendor. Consequently, internal processes from marketing to sales to service have to be aligned to the customer's journey so that salespeople can engage and collaborate with prospects and customers on how they want to tackle challenges, make buying decisions and implement and use a vendor's products and services.

Customer's Journey Alignment Was Reported by 56% of Study Participants

Sales Process Aligned to Customer's Journey

Not Considered 9.4%
Informally Aligned 35.2%
Formally Aligned 27.7%
Dynamically Aligned 27.7%

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Analyzing the data, it's interesting to see that 9% of the study participants reported that they do not consider the customer's journey. An informal alignment was reported by 35.2%. This sums up to 44.6% who have not purposefully aligned their sales process to the customer's journey. The remaining 55.4% reported a formal (27.7%) or even a dynamic alignment (27.7%).

An informal alignment means that the issue has been discussed and considered but not formally implemented. In many of the organizations we work with, we find that great effort has been made in customer journey mapping, frequently for different buying situations. But this mapping does not necessarily mean that sales processes have been adjusted or that there is a formal alignment or even implementation. Such a formal alignment was the case for 27.7% of all study participants.

A dynamic alignment (27.7%) goes even further: either deriving the sales process from the customer's journey or dynamically aligning it to the customer's journey and implementing modifications as soon as changes in the marketplace are detected.

Customer's Journey Alignment Improved Win Rates by as Much as 15%

Customer's Journey Alignment and Impact on Wins, Losses, and No Decisions
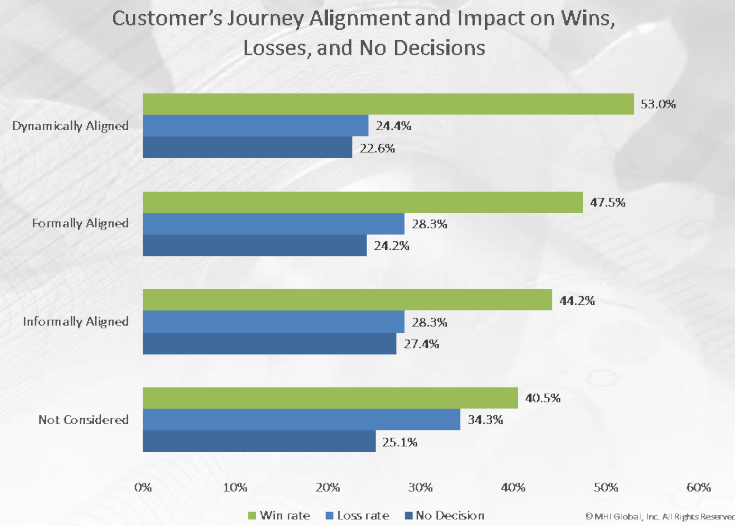
Analyzing the impact of the customer's journey alignment on win rates, loss rates, and no decisions shows why a formal, or even better, a dynamic alignment, is no longer optional. Instead, it is mandatory, because an informal alignment is not even enough to achieve average results.

Our study found an average win rate for forecast deals of 46.2%, an overall loss rate of 28.3%, and an overall no decision rate of 25.5%. With a dynamic alignment, the win rate improved significantly—up to 53%. No sales leader can ignore a 15% better win rate. Similar improvements can be achieved for the loss rate and for no decisions. The results for the loss rates are especially impressive: in a dynamically aligned environment, the losses can be reduced by 9% down to 24.4%, and the no decision rates by 8% down to 22.6%. Most impressive is the huge loss rate of 34.3% when the customer's journey is not considered in the sales process—21% worse than the average loss rate.

To achieve significant performance wins, sales force enablement has to build a solid foundation, based on a dynamic sales process alignment to the customer's journey. Only then can they equip salespeople and their managers with the skills, knowledge, strategies, and expertise to make every customer interaction relevant, different, and valuable.

Sales force enablement has to consider the different dynamics salespeople must navigate along the entire customer's journey. Only then can the discipline provide the appropriate services in terms of content, training, and coaching. The ultimate goal is to connect the dots between the content and training services for the salespeople and the coaching services for the managers.

CHAPTER 5: SOCIAL ENGAGEMENT'S INCREASING RELEVANCE

Before the internet and social networks changed our lives, salespeople had a knowledge advantage regarding their products and services. But this knowledge advantage is gone. The new selling in the age of the customer is defined by creating value for prospects and buyers at each stage of their customer's journey. This new selling requires social selling skills.
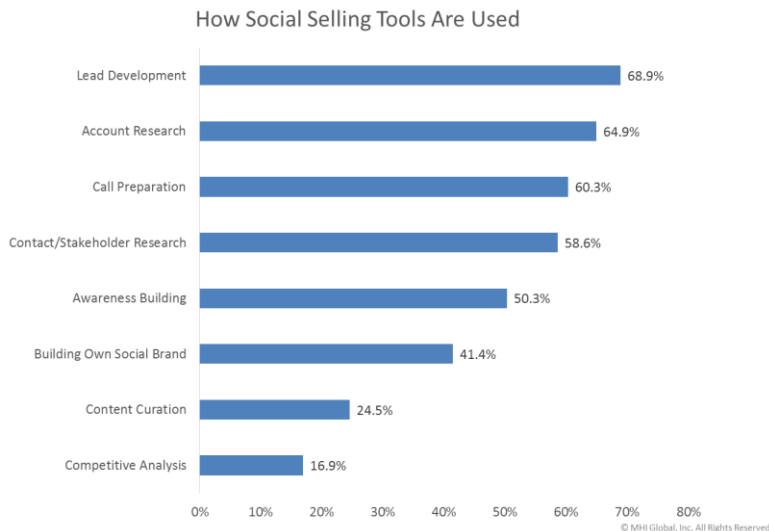
One of the biggest misconceptions is to equate social selling with tools, especially with LinkedIn. LinkedIn and other tools are vital to social selling, but social selling is about more than just technology. Leveraging social selling effectively requires enablement leaders to develop a strategic, holistic, and integrated social enablement approach that is based on social strategy alignment between marketing and sales and covers the entire customer's journey.

Social Selling is Used for Many Purposes, but Benefits Are Unclear if Social Strategies Are Not Aligned

In this year's study, we first sought to know which social tools salespeople use regularly. It comes as no surprise that LinkedIn is the most used social selling tool (84%), followed by Twitter (38%), Facebook (28%), Google+ (15%), and other smaller or regional applications.

These social selling tools have an even greater degree of penetration with participants who reported having their social marketing and social selling strategies aligned (21% of All Respondents). In this group, 100% use LinkedIn, 69% use Twitter, and 48% use Facebook. Also, the social productivity tools such as Hootsuite or TweetDeck are used by 20% of this group, compared to 9% in the All Respondents group.

This chart shows how social selling tools are used for various tasks, e.g., lead development (68.9%), account research (64.9%), and call preparation (60.3%).

How Social Selling Tools Are Used

Task	Percentage
Lead Development	68.9%
Account Research	64.9%
Call Preparation	60.3%
Contact/Stakeholder Research	58.6%
Awareness Building	50.3%
Building Own Social Brand	41.4%
Content Curation	24.5%
Competitive Analysis	16.9%

Next, we wanted to better understand the benefits expected from these tools. For 39% of All Respondents, "reduced account and contact search time" was the most expected benefit, followed by "not sure" with 37%, "increased number of leads" (33%) and "deeper relationships with clients" (31%). The subgroup with aligned social marketing and social selling strategies (21%) is much more focused. In the group with greater alignment, "increased number of leads" is the most expected benefit (57%), followed by "deeper relationships with clients" (56%). In this group, only 18% are "not sure" what to expect from using social selling tools, so the "not sure" answer at 37% from All Respondents may be interpreted as a lack of maturity.
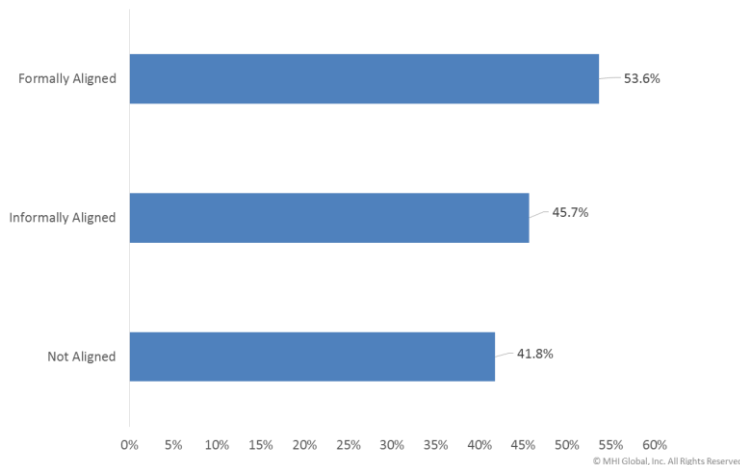
Primary benefits as a result of using social selling tools

Benefit	Percentage
Reduced account/contact research time	38.8%
Not sure	37.2%
Increased number of leads	33.2%
Deeper relationships with clients	30.6%
Improved lead conversion rate	24.0%
Shorter sell cycles	14.1%
Increased win rate of forecast deals	13.5%
Other	3.3%

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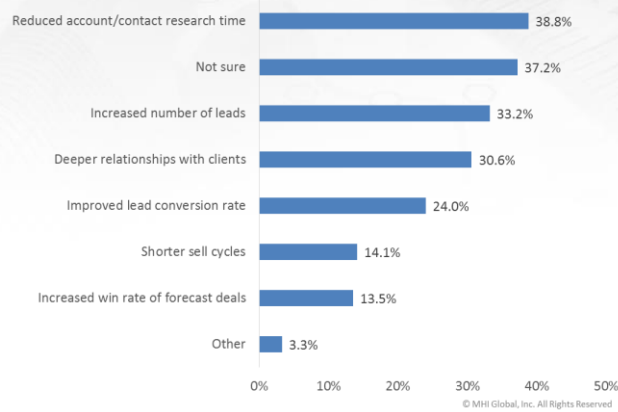
Social Selling Based on Formally Aligned Social Strategies Shows 16% Better Win Rates

Social engagement, as we call our approach, is about equipping salespeople with skills, tools, and content to successfully navigate the change, decision, and value dynamics along the entire customer's journey by leveraging social media.

Impact of Social Strategy Alignment on Win Rates

Alignment	Win Rate
Formally Aligned	53.6%
Informally Aligned	45.7%
Not Aligned	41.8%

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Our research shows that social strategy alignment has a tangible impact on quota and revenue attainment and, most significantly, on win rates for forecast deals. When sales and marketing social strategies were formally aligned, the win rate climbed by 16% up to 53.6% (compared to the study's average win rate of 46.2%).

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The data show another important finding: Only a formal alignment of the social strategies enables a sales force to perform better than average. Informally aligned or unaligned social strategies lead to win rates below average.

Sales force enablement plays a critical role when it comes to developing social capabilities across the sales force. What's not working, according to the data above, is to treat "social selling" as an isolated enablement issue, such as a LinkedIn tool training, and neglect to integrate such services into the sales process, sales methodology, or sales force enablement framework. Another common mistake is to forget the content component altogether or to believe it's only a marketing issue. It's not.

It is not by accident that world-class performers are two years ahead of average performers. Focus, speed, integration, and adoption are their critical success factors for leveraging social media effectively across the organization. Refer to the Going Forward chapter to learn more on how to effectively set up social selling.

CHAPTER 6: DECREASING NEW SALESPERSON RAMP-UP TIME

As highlighted in Chapter 1, the top productivity goal from this year's study was decreasing the ramp-up time for new salespeople. Successfully onboarding new hires (training on your company's products, sales process, value messaging, etc.) is just the start of this process. There is then the full gambit of things new hires need to learn about how to effectively sell into their new territory, what internal subject matter experts to turn to for help, how to get deals approved, etc. This is a universal challenge for sales. Even if you are not adding net-new sales professionals, you will likely be replacing salespeople who left because of turnover.

Sales Ramp-up Times Are Much Longer Than in the Past

We asked the study participants to share how long it took to bring a new hire up to full productivity, which we defined as generating the same level of revenue as experienced salespeople. The chart below shows that 60.7% of the study participants reported a ramp-up time of seven months or more.

Average Ramp-up Time for New Hires
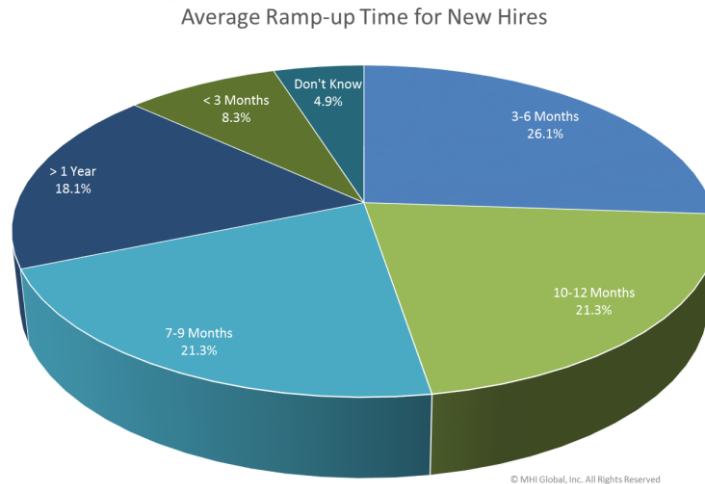
To put that in perspective, looking back to the first time we published this metric in the 2003 Sales Performance Optimization Study, that figure was 40.2%, with 45.3% of the respondents reporting a period of three to six months and the remaining 14.6% a ramp-up time of less than three months.

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To begin to understand the impact the complexity of a deal has on ramp-up time, we segmented the study data based on average deal size. The chart below summarizes the results of that analysis.

New Hire Ramp-up Time as Related to Average Deal Size

	<6 months	7-9 months	10-12 months	>12 months
Average Deal Size <$25k	40.9%	20.9%	16.7%	19.1%
Average Deal Size $25k - $100k	27.9%	33.3%	20.5%	17.5%
Average Deal Size > $100k	24.6%	23.6%	25.5%	22.5%

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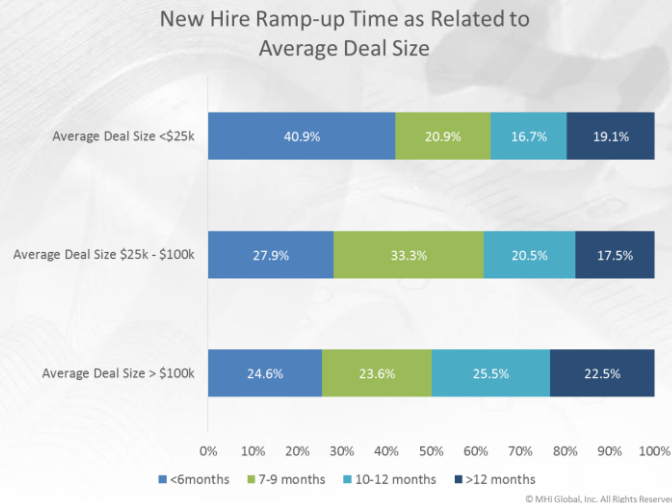
The growing length of time it takes to see full revenue productivity from new hires can have a significant impact on current year performance if you see a spike in turnover. Only a few organizations ever see an immediate increase in sales from hiring net-new people.

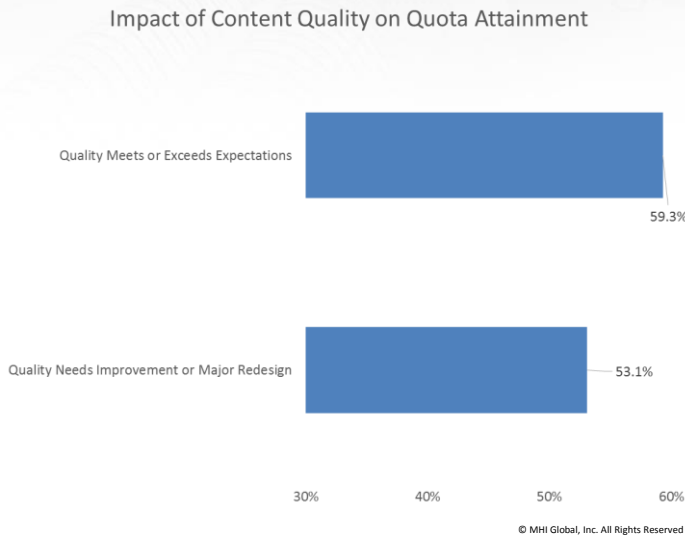## Leveraging Past Client Experiences Can Help New Hires Understand the Customer's Journey

To start to deal with this continuing challenge, sales leaders need to first determine what their ramp-up time really is. A fast/easy way to determine this metric is to list all the new salespeople hired in the past two years in column A of a spreadsheet. Then, in columns B through Y, enter their revenue contribution for each month since they came on board. In comparing new hire performance to experienced sales professionals, the analysis might show that the time to full productivity is actually 16 months. The point is that the true ramp-up time must be known so that plans can be made accordingly. Of course, if sales leaders don't like the results of their analysis, it is up to them to figure out what needs to be done to shorten the time.

One tactic we really liked the first time we heard it was having new salespeople conduct buy cycle reviews (i.e., interviewing clients of deals that were recently won, lost, or ended as no decisions). Reviews from new hires, with no vested interest in the status quo, can help the sales team better understand what factors influence success or failure. It will also give new salespeople a chance to more clearly understand the customer's journey as they will hear it firsthand from people in their marketplace. To learn how to do this, please contact your CSO Insights' analyst.

CHAPTER 7: EFFECTIVENESS AND IMPACT OF CONTENT SERVICES

Salespeople require a broad variety of content assets to engage with their prospects and clients along the entire customer's journey. Content services include enablement content assets such as playbooks, guided selling scripts, and email templates as well as customer-facing content including white papers, success stories, and references. Where does the content salespeople use originate? According to the data, marketing creates only 39% of the content, followed by salespeople (24.2%), product management (14.8%), sales enablement (11.9%), and operations/legal (6.6%). That clearly shows that sales force enablement is not just a discipline around "marketing content."

Content Quality is Mandatory to Drive Quota Attainment Above Average

Impact of Content Quality on Quota Attainment

Quality Meets or Exceeds Expectations — 59.3%

Quality Needs Improvement or Major Redesign — 53.1%

30%   40%   50%   60%

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We wanted to understand how content quality and quantity impact quota and revenue attainment. The data show that only high-quality content (ranked "meets expectations" or "exceeds expectations") can improve quota and revenue attainment so that it is above average. For example, with quality content, quota attainment could be improved by 6% up to 59.3% (average quota attainment: 55.8%). On the other hand, content with quality gaps led to a win rate 9% lower than average.

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Content Usage Along the Customer's Journey Must Be Improved

We then looked at how various content assets are used along the customer's journey. To make it simple, we focused on the three big phases: awareness phase/prospecting, actual buying phase/selling, and after the buying decision.

Content Usage Along the Customer's Journey

Asset	Awareness/Prospecting	Buying/Selling	Implementation/Maintain Relationship
Email Templates	76.5%	13.8%	9.7%
White Papers	65.3%	27.3%	7.4%
Product Collateral	42.0%	52.7%	5.3%
Needs Analysis Template	42.0%	52.9%	5.0%
Customer Case Studies	38.4%	53.4%	8.2%
References	21.4%	74.1%	4.5%
Client Focused Presentations	19.5%	67.8%	12.7%
ROI/Business Value Justification Template	14.6%	76.8%	8.7%
Proposal Templates	14.1%	83.8%	2.1
Technical Presentations	12.9%	75.2%	11.9%

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Unfortunately, we found no significant focus on what happens after the buying decision where content can be used to maintain and deepen the relationships and increase business within existing accounts. Overall, it's interesting to see that apart from email templates, white papers (65.3%) are the most used asset in the prospecting phase. However, there is still a preference to use product collateral (42%) over customer case studies (38.4%) and references (21.4%). It seems that there is still work to do to get to a buyer-focused engagement centered on the customer's challenges and desired results.

Content Along the Entire Customer's Journey is of Strategic Relevance

Sales content, internal enablement content, and client-facing content are of strategic relevance for several reasons. In the age of the customer, content quality and content quantity have a remarkable impact on quota and revenue plan attainment as discussed above. Furthermore, content quality determines the customer relationship levels that can be achieved (see Going Forward chapter). Relevant and valuable content is required at all stages of the customer's journey. It's a dangerous illusion to reduce the required sales content to only "marketing content" as this produces inevitable content gaps. As discussed above, only 39% of the content used by salespeople along the entire customer's journey is created by marketing.

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What does that mean for sales enablement leaders? Here are three actions to take, especially before implementing enablement technology.

1. **Conduct a holistic content assessment along the entire customer's journey:** Content types (e.g., whitepapers, case studies, and presentations) have to be defined (i.e., purpose, target audience, internal/external, and content creator) and mapped against the customer's journey. Involve salespeople and their managers to garner different perspectives. If you cannot decide which customer journey phase the content maps to, assign it to all phases.

2. **Analyze the results:** Typically, there will be one or more of these types of gaps in content: organizational, perspective, and customer's journey. By identifying the areas where there is insufficient content coverage, the results of the analysis become actionable.

3. **Define the next required actions:** These can include creating a holistic content management framework and a production and collaboration process to orchestrate various content creating functions along the entire customer's journey. In parallel, content gaps have to be closed and redundancies removed. Additionally, a multi-dimensional sales taxonomy (e.g., selling scenarios, buyer roles, industries, languages, regions, business challenges, products, etc.) has to be defined to make relevant content suggestions for salespeople.
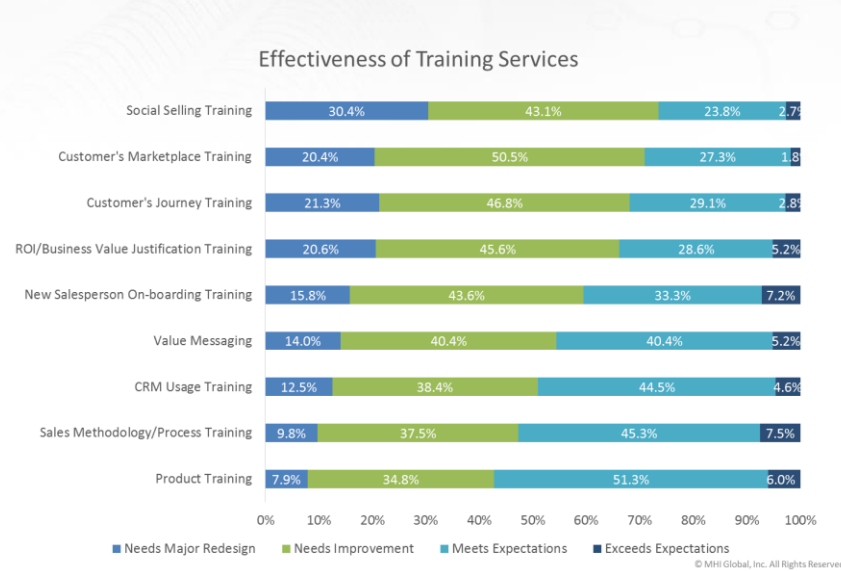
CHAPTER 8: EFFECTIVENESS AND IMPACT OF TRAINING SERVICES

"Think training is hard? Try losing."
—Davee Jones

Sales training includes a broad range of services covering product, skills and competencies, methodology and process, tools and CRM, as well as the training part of onboarding programs (see Chapter 6). Across all of these areas, investments in sales training are still more focused on salespeople than on sales managers. For both roles, the majority of investments range between $500 and $2,500. Interestingly, 6% of the study participants don't offer training services for salespeople, while 18.4% don't offer training for sales managers.

Training Services That Are Product or Process Centered Are Ranked Most Effective

Effectiveness of Training Services

Service	Needs Major Redesign	Needs Improvement	Meets Expectations	Exceeds Expectations
Social Selling Training	30.4%	43.1%	23.8%	2.7%
Customer's Marketplace Training	20.4%	50.5%	27.3%	1.8%
Customer's Journey Training	21.3%	46.8%	29.1%	2.8%
ROI/Business Value Justification Training	20.6%	45.6%	28.6%	5.2%
New Salesperson On-boarding Training	15.8%	43.6%	33.3%	7.2%
Value Messaging	14.0%	40.4%	40.4%	5.2%
CRM Usage Training	12.5%	38.4%	44.5%	4.6%
Sales Methodology/Process Training	9.8%	37.5%	45.3%	7.5%
Product Training	7.9%	34.8%	51.3%	6.0%

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The central theme we identified last year continues: training services that are well-established and centered around products and processes are ranked as more effective compared to those services that have to be designed with customers at the core.

Like last year, social selling training services show the highest need for major redesign (30.4% this year, 33.1% last year). Although the order has slightly changed since last year, overall, respondents also ranked customer's marketplace training, customer's journey training, and ROI/business value justification training services as needing major redesign and improvement.
Now, let's take a look at the impact of sales training on sales performance, especially for quota attainment and win rates.
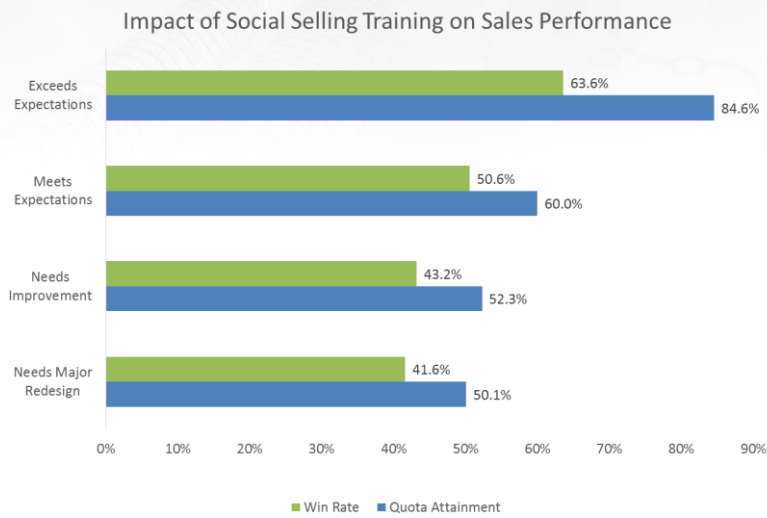
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The Better Organizations Understand Their Customers' Journeys, the More Effective Are the Related Training Services

Effective customer's journey training is essential to achieve better than average (55.8%) quota attainment. In cases where this training is ranked "exceeds expectations," quota attainment climbs to 74.1%—an increase of 32%. Clearly, customer's journey alignment matters!

Social Selling That Exceeds Expectations Improves Quota by 51% and Win Rates by 38%

In general, training services that are ranked as "exceed expectations" lead to tangible improvements in both attainment and win rates.

Impact of Social Selling Training on Sales Performance

	Win Rate	Quota Attainment
Exceeds Expectations	63.6%	84.6%
Meets Expectations	50.6%	60.0%
Needs Improvement	43.2%	52.3%
Needs Major Redesign	41.6%	50.1%

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In the chart on the left, we show the sales performance impact of social selling training services. If these training services are ranked as needing improvement or redesign, quota attainment and win rates fall below average by a significant margin. If social selling training meets or exceeds expectations, win rates can be improved by 38% (compared to the average win rate of 46.2%) and quota attainment by 51% (compared to the average quota attainment of 55.8%)!

These results cannot be ignored by any sales leader: not the performance gap resulting from poor social selling training and not the positive impact of effective social training services. So, what makes social selling training services effective?

In social selling training (or any other training area) the concepts have to be integrated into an organization's sales system to be effective. Social selling training must not be reduced to tool training for LinkedIn or Twitter. That's precisely the trap many organizations still run into when it comes to social selling. It seems that lessons learned from implementing CRM were not applied here. Salespeople are again asked to take tool training when at the same time the tool and the required skills have not yet been integrated into the current sales system, methodologies, and processes. The results are distressingly similar. This leads salespeople to consider the new tool, social selling, a time-consuming add-on task rather than an effective enabler to create more and better business.

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CHAPTER 9: FRONTLINE SALES MANAGER ENABLEMENT

Frontline sales managers are the most critical role in any sales organization. This role decides, based on an overall sales strategy, what salespeople sell, where they sell, to whom they sell, and even how they sell. Their span of control gives frontline sales managers the highest leverage effect in any sales organization. This role is where the rubber meets the road. Execution happens at the frontline, or not at all. But the frontline sales manager's role is often poorly defined and enabled, even though an investment in a single sales manager can positively impact the performance of many salespeople. For more details, see the CSO Insights Research Note: Building a Case for Frontline Sales Manager Development (membership required).

Still Not Enough Investment in Sales Managers Despite Significant Performance Impact

How Much Do You Spend on Sales Manager Training Per Person/Per Year?
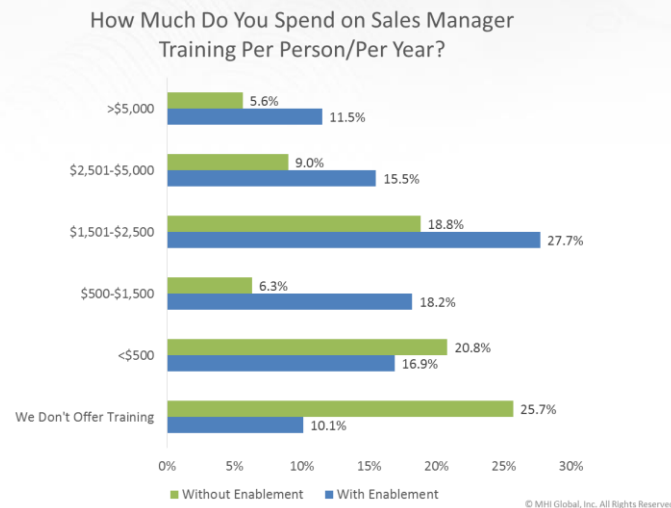
The relevance of sales managers as a target audience of sales force enablement is increasing. Like last year, frontline sales managers came in as the second most important user community (63.1%) for sales force enablement teams, right after salespeople and account managers (94.3%).

Organizations with an enablement function spend significantly more on their sales managers than those without an enablement function. From all study participants, 54.7% with an enablement function spend more than $1,500 per sales manager to develop their sales managers, compared to 33.4% without an enablement function. It's also interesting that 25.7% of the study participants without an enablement function spend nothing at all to develop their sales managers, compared to 10.1% with an enablement function.

Investing in Sales Managers Improves Quota and Revenue Attainment as Well as Win Rates

Based on our data, organizations realize a tangible business value when they invest in their sales managers. We looked at the differences between annual investments smaller or larger than $2,500 per person per year. We found that win rates could be increased by 9% up to 50.5% as compared to the average win rate of 46.2%. Revenue plan attainment could be increased by 18.4% up to 106.7% as compared to the average revenue attainment of 90.1%. Investing in frontline sales managers pays off, and developing this role has to become a strategic issue on every sales leader's agenda.

Investments in Sales Manager Development and
Impact on Sales Performance

	Annual Investment $500-$2,500	Annual Investment >$2,500
Quota Attainment	55.7%	57.8%
Revenue Attainment	88.3%	106.7%
Win Rate	43.7%	50.5%

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Take a Step-by-Step Approach to Develop Your Frontline Sales Managers

Organizations seeking to improve frontline sales manager development should follow three steps:

1. **Raise awareness of the complexity and the focus of the role:**
   Sales managers always operate in three dimensions that are often competing against each other: customers, business, and people. Additionally, their focus is too often on end results (such as revenue) which cannot be managed directly. Instead, their focus should be early along the customer's journey, focused on managing the right activities and coaching the related behaviors. Our Frontline Sales Manager Triangle and Frontline Sales Manager Mantra are frameworks that help sales enablement leaders understand the complexity and the focus of the role and demonstrate the need to invest in frontline sales managers.

2. **Assess your sales managers' current maturity level and build a business case:**
   When creating a solid business case for frontline sales manager development (membership required) and a tailored development program, it's important to understand the current maturity levels across the organization. Our Frontline Sales Manager Maturity Model (there are several follow-up blog posts on each maturity level available, as well as deeper research notes and webinars for research members) in combination with the Frontline Sales Manager Capability Framework are valuable resources for getting started.

3. **Create a tailored frontline sales manager development program:**
   To be successful, a frontline sales manager development program must address all three areas of the triangle: customers, business, and people. Of course, creating a coaching framework and developing these coaching capabilities in different areas as fast as possible are essential, but if coaching remains the only training aspect, frontline leader development will fall short of the mark. Furthermore, the frontline sales manager's role as collaborator, communicator, change agent, and escalation manager must not be underestimated and should be addressed in a comprehensive development program.

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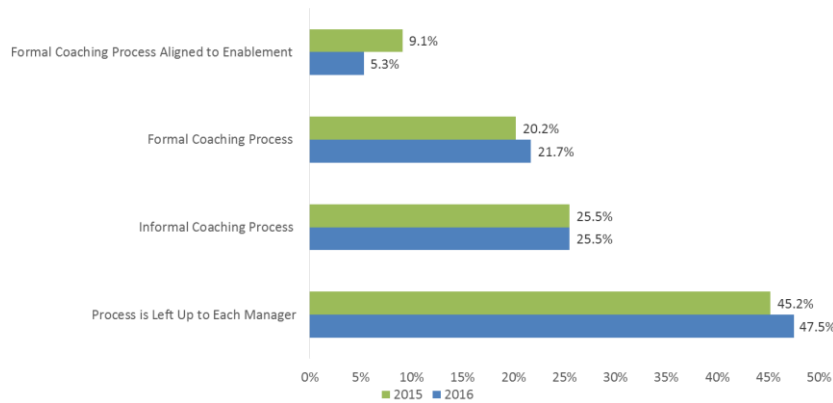A DIVISION OF MHI GLOBAL

CHAPTER 10: SALES COACHING

Sales coaching is a leadership skill that aims to develop each salesperson's full potential. Frontline sales managers must use their domain expertise along with social and communication skills to facilitate conversations with salespeople to discover areas for improvement and opportunities to break through to new levels of success. So, coaching is NOT asking questions such as, "What's your forecast this month?"

Sales coaching is often equated to lead and opportunity coaching, but the actual scope of coaching has to cover much more to create a sustainable impact on sales performance. Lead and opportunity coaching is complemented by coaching on skills and behaviors and funnel coaching. Depending on an organization's sales model, account and territory coaching may also be necessary.
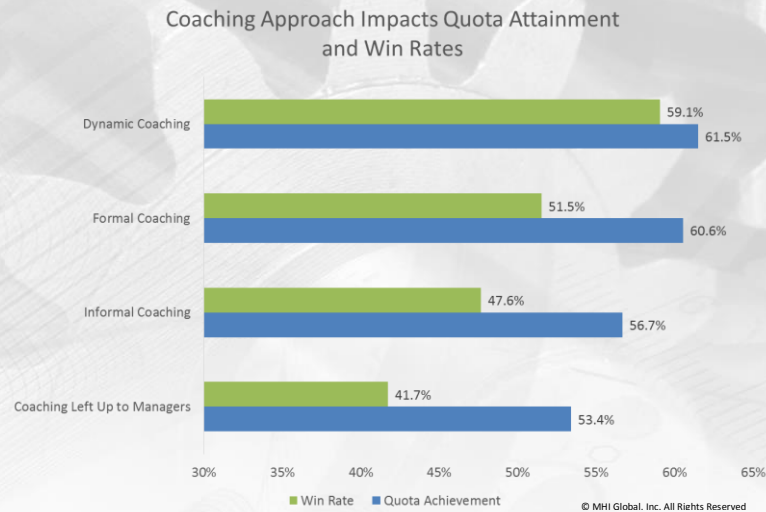
Dynamic Coaching Process Improves Win Rates by 28% and Quota Attainment by 10%

The way organizations approach coaching their salespeople has not changed a lot since last year. Almost half of the study participants (47.5% in 2016 and 45% in 2015) reported that coaching is left up to the managers. Only 27% follow a formal or dynamic approach, and as we will see, only this group is in the position to leverage the tremendous performance impact of a well-designed coaching approach.

Approach Regarding Coaching Salespeople

Category	2015	2016
Formal Coaching Process Aligned to Enablement	9.1%	5.3%
Formal Coaching Process	20.2%	21.7%
Informal Coaching Process	25.5%	25.5%
Process is Left Up to Each Manager	45.2%	47.5%

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Coaching Approach Impacts Quota Attainment and Win Rates

Coaching Approach	Win Rate	Quota Achievement
Dynamic Coaching	59.1%	61.5%
Formal Coaching	51.5%	60.6%
Informal Coaching	47.6%	56.7%
Coaching Left Up to Managers	41.7%	53.4%

■ Win Rate ■ Quota Achievement

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Coaching does matter. The impact on quota attainment is remarkable, and the impact on win rates is significant. When coaching is left up to managers, quota attainment is only 53.4%, as compared to the study's average quota attainment of 55.8%. An informal coaching approach improves quota attainment to 56.4%, slightly better than average. These findings show that investing in anything less than a formal coaching approach is a waste of money. It requires a formal coaching approach to get significantly better than average performance, and only a dynamic approach (coaching that is aligned to the enablement framework) can improve quota attainment by 10.2% up to 61.5%.

Coaching's impact on win rates for forecasted deals is even more impressive. The average win rate in the study was 46.2%. A formal coaching process led to an 11% improvement, and a dynamic coaching process improved the win rate by 27.9%. What sales leader can ignore a 27.9% better win rate and a 10.2% better quota attainment? None. Investing in sales force enablement to build coaching frameworks and develop sales managers, especially their coaching capabilities, is the key to seeing the kinds of performance improvements sought by sales leaders everywhere.

Four steps to make your sales coaching implementation a success:

1. **Build a case for a coaching framework:**
   When making the case for a coaching framework, sales force enablement leaders must accept two vital truths: the importance of the frontline sales manager's role regarding sales execution and driving performance and that coaching is a leadership skill that needs to be developed from scratch as most people are not born as natural coaches. Creating a case for a coaching framework is explained in detail in our Research Note: The Case for a Coaching Framework (membership required).

2. **Design a sales coaching framework:**
   The CSO Insights Coaching Framework (membership required) consists of five different coaching layers: lead and opportunity, skills and behaviors, funnel, account, and territory. The coaching framework sits directly between the customer's journey and the salesperson's journey and connects these different coaching areas.

3. **Create a solid foundation with coaching services:**
Based on a defined coaching framework, <u>enablement services to develop coaching capabilities</u> can be created. When designing training services to teach coaching skills, we always recommend laying a solid foundation by teaching people how to coach in general before adding training geared toward coaching in a sales context. Coaching guidelines equip sales managers to apply what they have learned in the field.
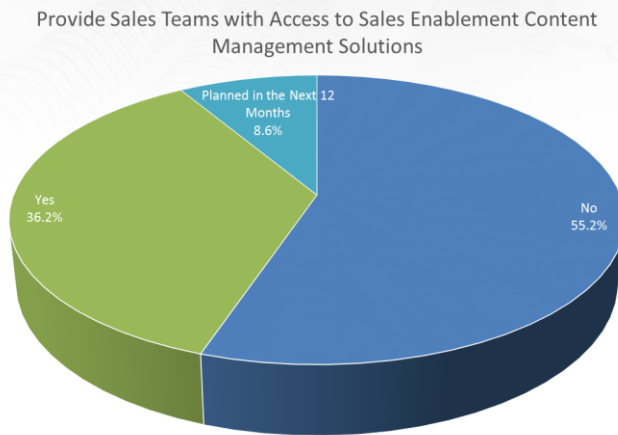
4. **Pay attention to clear communication, implementation, and adoption:**
Executive sponsorship is mandatory. Sales leadership must be vocal—across the organization and at multiple levels—about why this initiative is so important and the results that it can bring. In addition, sales force enablement must hold regular check-ins with both managers and salespeople to provide important perspectives on how to optimize the step-by-step approach.

CHAPTER 11: ENABLEMENT TECHNOLOGY REVIEW

To end this year's data analysis, let's refer back to the last line of our sales force enablement definition presented in the Introduction: *powered by technology*. We believe that this is not a "nice to have" part of the definition, but rather a "must have." If you are creating the right tools, training, messaging, content, etc. and sales teams cannot easily access them, then you are effectively fighting with one hand tied behind your back. Furthermore, if you cannot track what is being used and how effective it is in helping sales teams, the value of what you provide will diminish over time.

More Sales Organizations Are Leveraging Sales Enablement Content Management Solutions

Provide Sales Teams with Access to Sales Enablement Content Management Solutions

Planned in the Next 12 Months 8.6%

Yes 36.2%

No 55.2%

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In the chart to the left, we see that only 36.2% of the study participants surveyed had implemented a sales enablement content management (SECM) solution to optimize sales' ability to access the things they need to sell effectively. This is essentially unchanged from last year. However, 8.6% are planning to implement a solution in the next year.

Digging a bit deeper into the data, we found that in 2015, 33.3% of the organizations with an SECM system had developed the application internally. This year that number dropped to 19.8% as more firms opted to leverage commercially available platforms.

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Top Measurable Improvements in Sales Performance From Sales Enablement Content Management Solutions

Improvement	Percentage
Improving Access to Sales Content/Tools	57.4%
Reducing Search Time for Content and Collateral	33.1%
Sharing Best Practices Across Sales Force	27.7%
Improving Sales and Marketing Alignment	27.7%
Increasing Win Rates	27.7%
Reducing New Salesperson Ramp-up Time	24.8%
Improving Cross-selling & Up-selling	21.8%
Improving Ability to Track Content Usage	19.8%
Shortening Sell Cycles	18.8%
Reducing Cost of Supporting Sales	11.9%
Reducing No Decisions	10.9%
Reducing Discounting by Selling Value	8.9%
Reducing Competitive Losses	7.9%

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In looking at other options for sharing content, the most commonly mentioned were emailing content to salespeople for them to manage on their computers, sharing and managing content in multiple repositories, and sharing and managing content via the CRM system.

So what, if any, improvements are being achieved by utilizing a sales enablement content management solution versus these other options? The chart above summarizes the input we received from users. Here we see a combination of sales efficiency and sales effectiveness performance improvements that can easily cost justify the investment.

Understanding Your Sales Disablement Issues is a Starting Point for Improvement

Throughout this report, we have focused on sales force enablement. When making recommendations regarding technology for enablement, we first suggest sales and enablement leaders understand the concept of *sales disablement*, defined as *to weaken or destroy the capabilities of sales teams*. If it is difficult for sales teams to access the content and tools they need to effectively sell and/or the effectiveness of the content and tools is not tracked to determine what needs to be enhanced or changed over time, sales performance is negatively impacted. Sales leaders should quantify and monetize this impact for their organizations.

Second, realize the SECM CRM space is going through a period of rapid innovation. Having reviewed many of the commercially available solutions available, the need to build a solution in-house to get what you want is essentially a thing of the past. Sales and enablement leaders should educate themselves on what "better" looks like by engaging some of these solution providers.

Lastly, make full use of all the capabilities of an SECM platform as they provide the framework to manage all things sales content efficiently and effectively. These systems not only allow you to optimize access to the content and tools sales teams need, they can also fundamentally change how salespeople use those materials to more effectively engage clients.

Refer to the following reports for additional resources for updates on sales technologies:
- 2016 Sales Performance Optimization Study Find More Analysis (membership required)
- 2016 Sales Performance Optimization Study Win More Analysis (membership required)

GOING FORWARD

"If I had an hour to solve a problem I'd spend 55 minutes thinking about the problem and 5 minutes thinking about solutions."
—Albert Einstein

Understanding the Underlying Problems to Define the Right Enablement Set-up

There is so much truth in the quote above, especially for the growing discipline of sales force enablement. There are so many solutions, approaches, and ideas that many sales leaders are tempted to just buy this one or that one, assuming it will solve their problem. Most of the time, this is not the case as these solutions treat the symptoms, but not the underlying problem. Often, the root cause of the problem is not even fully analyzed.

Sales force enablement requires a unique approach in every organization. There are no right or wrong answers per se. Different approaches and solutions deliver different value in different situations, depending on an organization's context, the specific problems to be solved, and the desired outcomes. Therefore, it makes sense to take the time to understand the problem fully and not just treat the symptoms.

We recommend the following three steps to analyzing the challenge before making any decision on further sales force enablement investments regarding content, training, coaching, or technology:
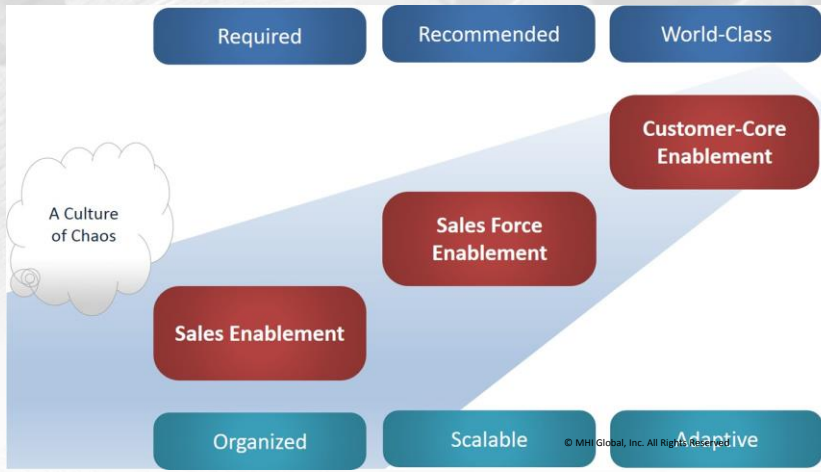
1. **Map the business strategy to the sales strategy and the current state of sales execution:**
    This step is often omitted but is essential to deeply understanding the ever-changing business strategy. As an example, when the CEO talks about solution selling, what does he or she really mean? Very likely, the phrase doesn't hold the same meaning as it does for someone with a perspective grounded in sales methodology. For the CEO, it might just be the aspiration of selling products and services with a higher margin, greater value, etc.

    To ensure sales leaders and business leaders are "speaking the same language," it is essential to conduct this step and, whenever possible, have conversations with all relevant stakeholders to get the whole picture. Only then can the right conclusions for sales be derived. When this step is taken, the analysis of the current state of sales execution and the consequences for sales force enablement (e.g., challenges, strengths, weaknesses, gaps, redundancies, etc.) is more insightful and produces more actionable information.

2. **Assess the current maturity level of enablement and understand the underlying problems to be solved:**

Our CSO Insights Enablement Maturity Model provides guidance to assessing the point of departure. Also here, there is no right or wrong approach, but it is essential to have clarity on the current state before embarking on any enablement transformation initiative.

Understanding the underlying problem to be solved is an add-on step that requires mapping the business strategy to the sales strategy and the current sales execution. Strength, gaps, and weaknesses can be analyzed, and the real problems can be identified and tackled accordingly. A guiding question for this step is: "If you don't know where you are, how can you plan the right trip to get to your destination?"

See also CSO Insights' blog: Frontline Sales Managers: Capabilities for the Required Maturity Level

3. **Create an enablement charter to connect the dots between vision, strategy, and implementation:**

Our process to create a comprehensive sales force enablement charter is based on a solid analysis of vision, mission, and purpose. This step can only be executed successfully if the first step, the assessment, has been

conducted. There are four steps that lead to a solid enablement charter including defining the target audience, defining the objectives to get to the future vision of success, deriving the required enablement services that are mapped to a timeline, and defining how to measure success in the different stages. With such a formal enablement vision, it's much easier to prioritize requests and programs. The charter becomes the enablement leader's internal selling tool, helping them gain buy-in for their initiatives and allowing them to focus on the most important initiatives first.

See also CSO Insights' Research Note: [Creating a Sales Force Enablement Charter.](#) (membership required).

Getting Cross-functional Collaboration Right

"Our greatest strength lies in collaboration, not competition."
—Joseph Rain

Competition is what salespeople have to deal with when they connect and engage with prospects and customers. Internally, they need collaboration to be prepared for the competition they will face in the outside world. Specifically, sales force enablement must collaborate with other company functions to be able to equip salespeople effectively.

Sales force enablement is a growing discipline with a measurable impact on sales performance. The data as analyzed in this trend cannot be ignored by any ambitious sales leader. Sales force enablement's scope and impact are growing, its target audience is growing, the variety of enablement services (i.e., training, content, and coaching) is growing, and sales force enablement's complexity is growing. Many different functions, not just marketing, contribute to the enablement services that have to be provided to the sales force (see Chapter 3). In addition, other functions, such as IT, have to be consulted in the process.

Cross-functional collaboration becomes the essential foundation, the "enabler" for sales force enablement, not only to drive efficiency when it comes to enablement production but also to drive sales effectiveness when adoption and reinforcement initiatives have to be implemented. But as we saw in Chapter 3, the quality of cross-functional collaboration is not in an ideal state. Instead, there is room for improvement as 69.2% of all study participants indicated they only collaborate on an ad-hoc or informal basis. This approach is not only inefficient, but also not scalable.

With increasing enablement maturity, enablement leaders have to define what collaboration means in their enablement context (for example, achieving faster and better results). This step is often overlooked, but it is essential. If we can achieve our goals on our own, we won't collaborate. We collaborate because we need others to help us achieve our goals. How others can help has to be specifically defined for each enablement area.

Based on this clarification, enablement leaders should define and implement an enablement production process, including a collaboration model. The production process should cover all steps from defining all enablement services (e.g., content, training, or coaching), to creating the content and training or coaching services, including localization. Finally, the results have to be measured and analyzed so enablement services can be improved with every iteration. A collaboration model should then be added to the defined process. For each enablement service, the accountable and responsible roles should be defined, as well as those roles that have to be consulted and those that should simply be informed. As an example, a customer success story is probably within marketing's accountability and responsibility, with the account manager to be consulted and enablement to be informed. A playbook might be in enablement's accountability and responsibility, with marketing to be consulted and sales managers to be informed. As always, your context matters.

Then, collaboration has to be lived and become routine; regular meetings, roundtables, or councils (you name it) are instrumental to getting things going and to learning together how to optimize decision-making processes and workflows. Do not underestimate the time it will take to get these groups working effectively. Keep going with your enablement charter in mind; the time is well invested, and there is no alternative to making sales force enablement efficient AND effective. Whenever you are stuck in a collaboration issue, change your perspective and look at the problem from the customer's journey. Do the same with your roundtables.

Social Engagement – Align | Integrate | Enable | Coach | Change

Social engagement, as we call our approach, is about equipping salespeople with the skills, tools, and content necessary to successfully navigate the change, decision, and value dynamics along the entire customer's journey by leveraging social media. To drive adoption and reinforcement, the sales managers' approach to coaching skills and behaviors has to reflect the social enablement efforts.

Social engagement continues to grow. It's no longer considered a mindset that varies according to salespeople's "social attitude." Social engagement methods and the required skills have to be integrated into an organization's sales methodologies and processes, powered by sales technology. Sales force enablement must also equip salespeople with all things social engagement: social skills, social technology (social networks AND their integration and representation in the internal technology), and the necessary relevant, valuable, and shareable content.

As outlined in Chapter 5 on social engagement, the data show us what's working and what's not. Whenever social selling is treated as merely a training tool, salespeople will perceive it as a task added to their already full plates. Adoption will be low and results even lower. It is intriguing that many study participants use various social tools for different areas, but 38% said that they were unsure about the expected benefits.

Here are five steps to consider when reviewing or designing an enablement program for social engagement:

1. **Align social strategies:**
   To realize the enormity of the potential impact of social engagement on sales performance, the social strategy of marketing and sales have to be formally aligned. It's not enough to have discussed this once at a strategy meeting. Perspective also matters. Looking at the challenge from a customer's journey perspective makes it obvious that these social strategies have to be aligned, if not integrated. Analyzing what the future vision should look like as compared to the current state and the desired results leads to the required actions to be taken.

2. **Integrate social enablement services:**
   As discussed in the previous chapters, social selling requires more than teaching people how to use the features and functions of LinkedIn. It's more important to inspire salespeople to develop a "social selling" mindset in the very beginning and then teach them the required social skills needed to connect and engage with potential buyers by leveraging social networks.

   This step requires social selling as a methodology to have already been integrated into an organization's sales system, sales process, and sales technology. In a perfect world, salespeople are "socially" guided along their workflows by their work environment, which is ideally a social CRM with integrated enablement technology. In practical terms, it means that salespeople receive suggestions on what to do, how to engage socially, how to respond to posts and discussions, how to share content, and how to drive meaningful interactions to get connected to the relevant stakeholders.

3. **Enable your sales force:**
   With the first two steps taken, it's easier to develop a learning program for salespeople on social selling skills that also covers the integration. The first step of any social training should be to explain why it is important and what results are expected to be achieved. Research data may help to define the business case for your organization. Once buy-in has been achieved, the required skills can be trained.

   Most importantly, the content dimension must not be overlooked. Salespeople need shareable, relevant, and meaningful content. This is another reason aligned sales and marketing social strategies are essential and effective collaboration is a social enabler. If this alignment is not working and "social" is not integrated into your sales system, methodology, process, and technology, your entire social selling program will disable your sales force.

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Without shareable "social" content at hand, training social skills is like training someone how to sail a ship while remaining on shore. It won't work.

4. **Coach frontline sales managers and let them coach on social skills and behaviors:**
An additional element of a social enablement program is to integrate social engagement as a component of the frontline sales managers' coaching framework or process. As discussed in Chapter 10, there are various coaching areas to be considered. Whenever there is a need to change behaviors, proper coaching is essential. So, frontline sales managers not only need to learn all the social skills first, but they also have to learn how to coach their salespeople accordingly to drive adoption and reinforcement.

5. **Change social engagement behaviors and drive results:**
With the first four steps executed, we now have the foundation to drive change successfully. However, communication is vital during times of change. Reinforcing the "why" story and communicating first results, ideally on the sales enablement and collaboration platform within the CRM system, help to drive adoption. In parallel, the senior executives should chime in with encouragement and positive reinforcement.

Stay tuned! We will soon publish a social engagement maturity model to provide further assistance along the way.

Frontline Sales Manager Enablement – Assess Maturity | Build a Business Case | Integrate | Enable | Coach | Change

"The Principle of Priority states (a) you must know the difference between what is urgent and what is important, and (b) you must do what's important first."
—Steven Pressfield

Frontline sales managers have a greater impact on sales execution, sales productivity, and sales transformation than any other role. Frontline sales managers have to balance multiple top priorities. They also need to strike a continuous balance between three often-competing areas— customer, business, and people, and do so in constantly changing and complex selling and buying environments. Plus, frontline sales managers are sandwiched between the competing goals and motivations of their team and corporate executives as well as between those of customers and the internal organization.

Having been the best sales professional in the organization does not automatically qualify an individual to be a top-performing frontline sales manager. Sales leaders with ambitious growth and performance goals cannot afford mediocre sales results. Yet, that is exactly what they get when they leave frontline sales managers to figure out their role on their own. Poorly developed frontline sales managers drive top performers out of the organization and promote mediocre

performance from those who remain. Their approach comes from a lack of training and development, and not malicious intent, but the results are the same.

World-class sales performers understand that frontline sales manager development is not about adding costs to the bottom line, but adding growth and effectiveness to the top line. They understand that the cost of doing nothing is much bigger.

We recommend these six steps to approach frontline sales manager enablement successfully:

1. **Assess frontline sales manager maturity:**
   Assess frontline sales manager maturity: As always, defining the point of departure is the key to building a business case and a tailored development program. Our CSO Insights frontline sales manager maturity (membership required) and frontline sales manager capability models (membership required) provide guidance on how to define maturity levels and capability clusters. Assessing Frontline Sales Manager Maturity (membership required) explains how to approach the assessment. The purpose of this step is to identify which frontline sales managers are at the required maturity level and which are at the recommended maturity level, as well as to understand how they see their role as communicators, change agents, and collaborators.

2. **Build a compelling business case:**
   By combining our research on the business impact of well-developed frontline sales managers (see Chapter 9), an analysis of current sales challenges, and the results of the maturity assessment, sales leaders can create a compelling business case for frontline sales manager development (membership required).

3. **Integrate: Build a coaching framework:**
   The business impact of coaching was shown in Chapter 10. However, coaching is about more than just coaching on opportunities. Instead, coaching covers several areas such as lead and opportunities, skills and behaviors, funnel coaching, and account and territory coaching.

   Our CSO Insights coaching framework (membership required) sits directly between the customer's journey and the sales professional's journey and maps the different coaching areas to the customer's journey. Furthermore, it should be ensured that the coaching framework supports the enablement framework. Ideally, it is a mirror of the enablement framework, addressing the enablement areas from a coaching perspective.

4. **Enable**: **Develop enablement services and get started:**
   With the coaching framework in place, enablement is ready to develop training and content services (membership required) that cover all areas of the frontline sales manager triangle: customers, business, and people. To provide a proper foundation,

these coaching services should teach frontline sales managers how to coach in general, before teaching them how to coach successfully in a sales context. Also, make sure that sales managers are equipped with at least a coaching guideline to empower their daily work.

5. **Coach: Determine who coaches the coach:**
    Frontline sales managers should be supported during this transformation in several ways. Mentoring in a peer-to-peer exchange allows new coaches to share experiences and best practices. A frontline sales manager community can be valuable as well, and senior executives should at least be available as a sounding board for their managers even if they are not that familiar with coaching them.

6. **Change: Communicate, iterate, and measure success:**
    Communication is important during this transformational phase, when frontline sales managers are being developed for the first time in a way that's specific to their role. The change story as part of the business case cannot be repeated often enough, together with first results and lessons learned. Surveys to learn how the changes are perceived by both managers and salespeople help to identify what needs to be improved. Measuring success in this phase requires defining how to measure success early, ideally already in the business case. A sounding board of sales managers, salespeople, enablement team, sales operations, and sales leaders could be an additional element to underline the senior executives' sponsorship and the importance of the program to ensure sustainable sales performance and growth.

As you think about your organization, which areas come to mind for focusing your efforts in 2016? If you have a clear direction, we wish you the very best of luck. However, if you would like help determining what to target, how to proceed, and how to be successful, Advisory Services clients should set up a study briefing call to discuss the findings of the study as they relate to your firms, to prioritize the next steps to take, and to explore best practices and case studies of peers who are achieving the goals you have set for your organization.

If you have any questions or comments on the information presented in this report, feel free to contact us.

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ABOUT CSO INSIGHTS

CSO Insights is the independent research arm within MHI Global, dedicated to improving the performance and productivity of complex B2B sales. The CSO Insights team of respected analysts provide sales leaders with the research, data, expertise, and best practices required to build sustainable strategies for sales performance improvement. CSO Insights' annual sales effectiveness studies, along with its benchmarking capabilities, are industry standards for sales leaders seeking operational and behavioral insights into how to improve their sales performance and to gain holistic assessments of their selling and sales management efficacy. Annual research studies include: *Sales Best Practices Study*, *Sales Performance Optimization Study*, and *Sales Enablement Optimization Study.* Bi-annual studies include: *Sales Compensation and Performance Management Study* and *Channel Sales Optimization Study*.

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