



Sales Enablement  
Charter Template





# Why You Need A Sales Enablement Charter

The Sales Enablement role varies slightly from one company to the next, but it's often referred to as a "fixer of all things." More than any other role, this makes sales enablement prone to disjointed requests and distraction.

As a sales enablement leader, you must stay focused and true to your primary purpose. Not only does this require you to define it with management, but also lead and reinforce the goals with your extended team, including milestones and celebration for achievement along the way.

## How to Get Started

- 1 Distill your primary goals from your executive team: the CEO, VP of Sales and VP of Marketing.
- 2 Draft your sales enablement charter in 1-3 slides. A simplified version follows on the next page.
- 3 Review and iterate with your stakeholder team. Make sure you include sales management and marketing.
- 4 Submit the final sales enablement charter to your boss and leadership team for approval.
- 5 Champion and share the final version with your sales and marketing organization.
- 6 Launch your sales enablement charter.
- 7 Review the charter quarterly with stakeholder teams, or more frequently depending on your company culture.
- 8 Celebrate success!

# <Company> Sales Enablement Charter

<b>Goals</b>	1. <Describe desired outcome of team for your company> 2. ...	
<b>Scope &amp; Supporting Tactics</b>	< Describe team's key responsibilities >	
<b>Stakeholders</b>	Receivers	< Receivers of your service, such as the Sales team >
	Supporters	< Providers of your service such as Marketing, content managers, CRM managers >
<b>Key Deliverables</b>	Next 6 Months	< Short-term projects >
	6 - 18 Months	< Longer-term projects >
<b>Metric:</b>	Leading	< Activity based metrics such as # of calls, # of meetings, # of opportunities added to pipeline >
	Lagging	< Outcome based metrics such as time to full productivity, quota / target achievement >

# ABC Sales Enablement Charter Example

<b>Goals</b>	<ol style="list-style-type: none"> <li>1. Increase revenue by reducing the onboarding time from 5.4 months to 4 months.</li> <li>2. Increase average deal size of opportunities entering the funnel by 10% or more through targeted sales training.</li> <li>3. Increase core selling time by 20% by streamlining our sales enablement tools and reducing manual tasks.</li> </ol>	
<b>Scope &amp; Supporting Tactics</b>	<p>Build foundational knowledge for our sales team. Improve sales onboarding so new reps can ramp up to full productivity quickly. Introduce XYZ sales training methodology. Build a skill-based certification and increase sales productivity through the adoption of effective messaging, processes and tools.</p>	
<b>Stakeholders</b>	Receivers	Sales Management, Field Sales, Channel Sales, Inside Sales, Sales Development
	Supporters	Marketing, Product Marketing
<b>Key Deliverables</b>	Next 6 Months	<ul style="list-style-type: none"> <li>• Deploy a three week onboarding program for new hires.</li> <li>• Certify sales team on new sales training methodology</li> <li>• Train team on a series of upsell scenarios including role plays and self-study.</li> </ul>
	6 - 18 Months	<ul style="list-style-type: none"> <li>• Deploy new sales enablement platform for training and content</li> <li>• Create and deploy partner self-service portal</li> </ul>
<b>Metric:</b>	Leading	Sales readiness completion, new hire competency on final quiz, new hire pipeline build by month 4, Opportunity entry \$ average
	Lagging	Full productivity by month 8, Average deal size of \$50K, 20 deals won

## Conclusion

Sales enablement can be your competitive advantage, but you need to do it right. CSO Insights found the number of companies investing in sales enablement has tripled in the last few years. Yet during that same time, the number of companies that **achieved** their sales enablement goals barely budged.

A sales enablement charter can be the catalyst you need to turn your investment into real results. Make it your compass, and let it guide you to your goals. No sales enablement plan can predict the future. But your sales enablement charter can help you adapt to a fast-changing market and achieve success.

## About Veelo

Veelo is a single, easy-to-use sales enablement platform that improves sales onboarding, optimizes sales performance, and increases revenue. Veelo provides sales enablement templates and frameworks that make it easy to launch and expand a sales enablement program.

Built on brain science principles and powered by machine learning, Veelo ensures sellers are equipped with the content, coaching and productivity tools they need to win. Companies like Qorvo, Tripwire, and United Language Group use Veelo to improve sales productivity and effectiveness.

Want to learn more? Email [sales@veeloinc.com](mailto:sales@veeloinc.com), call 855.414.8760, or visit us at <https://veeloinc.com>.

## Additional Resources

[A One Person Sales Enablement Department Survival Guide](#)

If you are a one person sales enablement department, the work might seem overwhelming. Read this guide to get tips and tactics to thrive in your new role.

