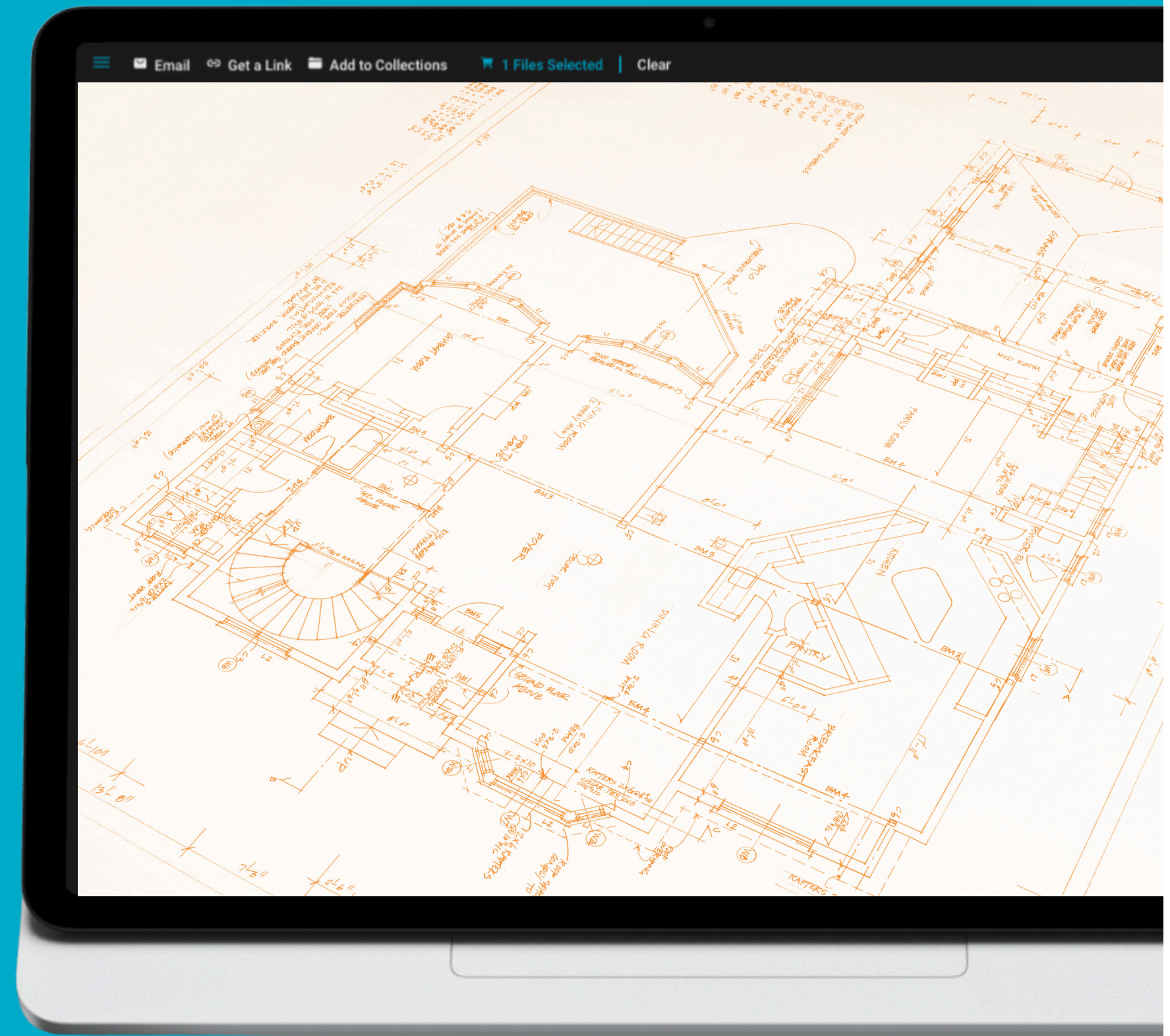# SALES ENABLEMENT

BLUEPRINT

klyck.io

BLUEPRINT OVERVIEW

Your sales enablement blueprint functions as your business plan and is your guide for turning random sales enablement efforts into a formal, scalable, measurable and strategic enablement discipline that has a definable, positive impact on your business. When it is unclear who is accountable for sales enablement efforts, the results are often misaligned and ineffective.

This sales enablement blueprint can be used to clarify responsibilities and align cross-functional team members to maximize the impact of enablement efforts.

CHOOSING A PROJECT MANAGER

It is imperative that your organization chooses a dedicated individual for overseeing and coordinating the success of the project by allocating a **minimum of 6 hours per week** to focus on **content needs, strategy** and **general support**.

Your manager will be responsible for communicating with users, internal teams and your vendor to facilitate the success of the project.

Project Manager Traits & Experience

- 5+ years of experience in sales, marketing, onboarding programs or project management

- Passionate about increasing collaboration between sales, marketing and operations with a proven ability to lead multi-stakeholder projects

- Organized, detailed oriented and strong ability to communicate with multiple groups

- Thorough understanding of organization and how various internal groups function

STEPS FOR SUCCESS

1 Identify dedicated project manager (6 Hrs/week minimum)

2 Set clear goals & key deliverables with team (Use blueprint template – Slide 4)

3 Create communication plan (Stakeholder updates and regular executive reviews)

4 Create training plan (Live monthly training, onboarding, videos, best tips..etc)

5 Identify integrations to increase utilization (CRM, SSO, DAM/CMS...etc)

GETTING STARTED

1 Fill out the blueprint template with your executive team (CEO, VP of Sales, VP of Marketing) to identify project goals.

2 Identify user base for project (Divisions, teams and employees who will be involved either supporting or receiving).

3 Create and implement a communication plan (Updates to users and consistent executive project reviews).

4 Create and implement a training plan (Live monthly training, onboarding, videos, best tips).

IF KLYCK **5** Identify integrations to increase utilization (CRM, SSO, DAM/CMS)

SUCCESS AS A PROJECT MANAGER

PROJECT MANAGER OVERVIEW

Stepping into the role of a project manager can seem like an overwhelming job, but there are many simple steps that can be taken to ensure your success. As a project manager you must clearly define and enforce goals with your extended team, while also communicating and celebrating successes along the way.

Whether your managing a team of 5 or preparing to launch an enterprise wide sales enablement project, we want to ensure you have the knowledge and resources to succeed at every step of the way. Below are some getting started steps to help you get started with your project.

klyck.io

BLUEPRINT TEMPLATE

GOALS	Establish 2-3 clear and achievable goals.	
SUPPORTING TACTICS	Describe team's key responsibilities and activities that will help achieve goals.	
STAKEHOLDERS	Receivers	Receivers of the service such as sales teams or roles within a team (Inside sales, outside sales...etc)
	Supporters	Supporters of the service such as marketing or operations (Create content for sales to use)
KEY DELIVERABLES	Short-Term (6 Months)	Identify short term deliverables that can be completed within 6 months.
	Long-Term (6 – 18 Months)	Identify long term deliverables that can be completed after 6 months.
METRICS	Leading Metrics	Identify metrics that help measure the success of your project and activities (# of calls, # of meetings, # of opportunities, # of user logins if it's software...)

GOALS

1

**Clearly Define
Goal Here**

2

**Clearly Define
Goal Here**

3

**Clearly Define
Goal Here**

klyck.io

KEY DELIVERABLES TEMPLATE

SHORT-TERM (Less Than 6 Months)	LONG-TERM (Longer Than 6 Months)
Short-Term Deliverable #1 Description & Objective	Long-Term Deliverable #1 Description & Objective
Short-Term Deliverable #2 Description & Objective	Long-Term Deliverable #2 Description & Objective
Short-Term Deliverable #3 Description & Objective	Long-Term Deliverable #3 Description & Objective
Short-Term Deliverable #4 Description & Objective	Long-Term Deliverable #4 Description & Objective
Short-Term Deliverable #5 Description & Objective	Long-Term Deliverable #5 Description & Objective
Short-Term Deliverable #6 Description & Objective	Long-Term Deliverable #6 Description & Objective

klyck.io

SHORT-TERM DELIVERABLES EXAMPLE

SHORT-TERM (Less Than 6 Months)	TASKS REQUIRED
Setup Klyck Environment Clean up the environment structure by renaming, removing and hiding categories from the content library. Keep environment simple with only a few categories.	1. Identify user base for project (Division, team and list of users – ideally 10-50 users with a diverse enough scope in different positions to properly test) 2. Identify content required for teams using platform 3. Determine categories needed for content and conversations library
Organize & Tag Content Organize the content library by removing, adding and renaming content in the library while also placing in correct categories. Use master excel sheet to make edits and changes to content/conversations data.	1. Create and use master content and conversations excel sheet (Klyck – provide excel sheet with all content and metadata fields) 2. Using mater sheet, dit content metadata 3. Place content into correct categories 4. Tag content with keywords (Use bulk tagging template)
Route Content, Conversations & Users Route content and conversations to users based off their profile criteria, need to define filters and user profile criteria. Adjust user profiles once criteria is confirmed.	1. Choose routing/filters 2. Adjust content, conversations and user routing
Create Communication Plan Create and implement communication plan to notify users on relevant enhancements or features while also establishing regular meetings with stakeholders to review project progress.	1. Identify communication plan options (frequency and reason) 2. Create and confirm communication plan
Setup Weekly & Monthly Reports Set-up exportable monthly and weekly reports through curator to update key stakeholders on utilization and activity	1. Discuss most effective way to deliver analytics reports 2. Show Mayer/Establish process for receiving or accessing reports

YOUR DIGITAL GATEWAY TO SUCCESS

FOR MORE SALES ENABLEMENT INSIGHTS VISIT OUR WEBSITE