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# TOP 8 SALES ENABLEMENT STRATEGY CHECKLIST

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*“Most organizations have SDRs, whether that is account executives doing their own prospecting, a part time resources hitting the phones or full time sales development reps. What we’ve learned over the last 10 years is that there is a large difference in having SDRs and having an SDR program. When organizations fail, they often cut what they believe is the bottom line, and unfortunately, sales development is at the top of that list. Our belief is that SDR programs are the lifeline for every organization looking to scale, grow or maintain sales revenue. That said, without proper program guides, tools, training, methodology, and a plan on how to measure metrics and ROI, they often fail”.*

*-Matt Wheeler, Founder & CEO*

***Now that you’ve invested in ZoomInfo as your managed data provider, it’s time to get your sales enablement program built. Here are QM’s top 8 program requirements you should focus on to get your internal SDR program started.***

## Go-To-Market Strategy

All roads start here. Think of your Go-To-Market strategy as the roadmap for your sales program. Who are you reaching out to? How are you communicating with them? There’s a variety of ways to launch your educational outbound program. You will first need to decide on whether you will be running a

- Fully digital marketing program
- Hybrid role: Are your sellers also having to prospect?
- Fractional SDRs: Having college students/part time employees lightly hitting the phones
- Fully dedicated, full time SDRs

Based on which particular model you are doing, you will need to build an individual plan on how you are going to deploy your lead data.

## Ideal Customer Profile Planning (ICP)

Building your Ideal Customer Profile Plan is the most critical thing to know in optimizing your data investment. Developing an ICP is truly understanding how to align your product or service to the needs of specific personas and markets.

- Persona – who is your decision maker, influencers, champion/user
- Number of Employees – are you selling anything that relates to endpoints/users – sizing for different departments
- Vertical (Healthcare, Oil & Gas, Finance, etc.)
- Location – Be honest about where you are able to support companies. We work with a lot of companies who aren’t thoughtful enough
- Annual Revenue – what company size is large enough where it makes sense for them to spend money on your solution



## Sales Tools

Composing the ideal tool stack to achieve your sales goals is key to being able to set goals, monitor activity and measure results. For example, if you understand the capabilities of your team's dialing software, you can then understand how many activities they will be able to produce on a daily basis. From there, you can analyze your call ratios to develop a standard daily outcome to measure your team's results against.

Types of Tools to Consider:

- Cadence Dialer
- Parallel Dialer
- Email Marketing Software
- Video Messaging Platform
- CRM/Data Analytics
- Coaching/Training Software
- Managed Lead Database
- Website Visitor Tracking
- Website Chat Software

## Playbooks

The outline of your playbook should be used to develop the training program for your team. Playbooks should be used in conjunction with live training to help get your team started but also to reference throughout their day to day. Playbooks are a scalable component to not only onboard new team members, but to drive self-sufficiency in knowledge transfer.

Key Playbook Components to Consider:

- Company Overview
- Team Mission & Goals
- Sales Tool Training & Best Practices
- Professionalism
- Marketing Collateral
- Case Studies (organized by vertical and persona)
- Call Frameworks
- Persona Documentation
- Templates
- Product/Service Training
- Qualification Criteria



## Training

Once you have developed the outline for your playbook, you can then begin to build your training program. Creating a scalable training program is important to keep up with company growth. Adding new SDRs can result in bogging down a manager and a bad experience for the rep if there is no plan or documentation.

Things to Think About:

- About Us (history of the company, executive team, mission statement, value proposition, etc.)
- Product
- Features & Functionality
- Problem Solving – how you solve a particular business problem
- Objection handling
- Gatekeeper training
- Cadence instructions – why do we do what we do
- What you should and shouldn't say
- Qualification Criteria
- Having resources from sales, marketing and engineering who are able to develop recorded content for each of their departments as it relates to the program

## Data & Analytics

To create a predictable, scalable sales program, you must manage by the metrics. Understanding what data to collect is important, but then using that data to calibrate your team to improve results is key. *Monitor. Measure. Recalibrate. Repeat.*

Ideas of Metrics to Collect:

- Total number of each type of activity (calls, voicemails, emails, social touches, video messages, direct mail)
- Call, Conversation, Social, Meeting and Close Ratios
- Days and Times of Calls, Conversations & Meetings
- Titles, Verticals and Regions of Success



## Return On Investment 'ROI'

What is the ROI that you need to have for your program to be sustainable? Are they looking for 2x, 5x, 10x? Do they just want to break even on the first year to evaluate? You can begin to understand how much pipeline each of your SDRs needs to create that will result in the required amount of closed-won deals to achieve the desired ROI.

Example ROI Chart for Fully Ramped Program	
Number of Sales Development Representatives	3
ASP	\$150,000
Length of Sales Cycle	6 months
% Meetings to Pipeline	50%
% Closed-Won Opportunities	25%
Average # Opportunities Created per Month (fully ramped)	20
Average # Opportunities Won Year 1	13
A fully ramped program in 12 months would yields 104 opportunities, 13 closed-won opportunities \$1,950,000M = 9.5X return on a \$204,000 investment	

## Quotas and Expectations

Through understanding the desired ROI your organization expects from your program and the average metrics that can be achieved over the first 90-120 days of your team going outbound, monthly quotas and expectations can be set. These can be adjusted each month based on where data is able to help you make improvements in the program. To account for the investment in employees such as insurance, taxes, etc. and possible turnover or change in direction, managers should assign an additional 20-30% to their reps on top of the goal ROI.