SALES ENABLEMENT WORKBOOK

A Beginner's Guide to Applying Sales Enablement to **Your Business**

First Edition

HubSpot Academy

Table of Contents

Glossary

Buyer Persona — A semi-fictional representation of your target customer based on data.

Goal — A metric outcome you can check off a list.

Hand Raiser — Someone who explicitly asks to talk to sales.

Hero Statement — A single sentence that combines a buyer persona with a job to be done.

Ideal Customer Profile — A checklist of the most basic attributes someone needs to have in order to be successful as your customer.

Jobs to Be Done — The progress your customers "hire" your product to help them make.

Judicial Branch — A small group of leaders who review every lead sales rejects.

Marketing Qualified Lead (MQL) — Leads that are both a good fit for your offering and ready to have a sales conversation.

Marketing Velocity — A measure of your marketing team's productivity.

SLA — See "Service-Level Agreement."

Sales Enablement — The processes, content, and technology that empowers sales teams to sell more efficiently at a higher velocity.

Sales Velocity — A measure of a salesperson's productivity.

Service-Level Agreement — An agreement between a service provider and its customer that guarantees a certain output. In the context of aligning marketing and sales, the agreement typically requires marketing to deliver a certain number of leads each month and requires sales to contact those leads within a specific timeframe.

Smarketing Meeting — A time when sales and marketing come together to discuss problems and collaborate on solutions.

Vision — A state of affairs you want to bring into being.

1 Section 1
Introduction to Sales Enablement

Sales enablement is the processes, content, and technology that empowers sales teams to sell more efficiently at a higher velocity. To implement a sales enablement strategy at your company, your marketing and sales organizations are going to have to work closely together. The exercises in this section will help you evaluate the current state of your organization so you can know where you should focus your efforts first.

Want to know more?
Watch Introduction to Sales Enablement (17:40)

✎ Activity 1

Sales Enablement Self Assessment
Answer the questions below to evaluate how well your sales and marketing teams currently work together.

Aligning Goals
Describe your current process for setting company goals and translating them into departmental goals. *How clearly defined is this process? How well do employees at all levels of the organization understand it?*

Describe the relationship between marketing goals and sales goals in your company.
Do marketing and sales have shared goals or separate goals? How closely are their goals aligned?

Target Buyers

Describe your company's target buyer. *What characteristics make a person or organization a good fit for your offering? How do you know? Are there any factors that make someone a bad fit for your offering?*

Ask a colleague to describe your company's target buyer. *How is their description similar to yours? How is it different?*

Processes

Describe when and how leads get passed between marketing and sales. *How well is this process understood by the members of both teams?*

Describe any processes you have in place to align marketing and sales, such as regular meetings, reports, service-level agreements, etc. How effective are these processes?

Content

Describe the content creation process at your company (if any). *Who is in charge of it? Who else is involved? How effective is it? If you don't have a defined process, describe any efforts your company has made to produce content.*

Describe the way content is (or isn't) currently used in your sales process. *Do salespeople use the content marketing creates? Are they able to find it when they need it?*

Technology

Describe the marketing technology your company is currently using. *Where do you store and organize your contacts? What tools do you use to create and distribute content? How is your website managed? What tools do you use to communicate with marketing leads? Do you have a marketing automation platform?*

Describe the sales technology your company is currently using. *How do you store and organize your contacts? How do you track the progress of individual sales? How do you report the performance of individual salespeople? Do you have any tools to automate or simplify your sales process? Do you have a CRM?*

Additional Resources

- Inbound Marketing Certification — If you're in marketing, this course is for you. It will teach you fundamental inbound principles and the marketing practices that use them.
- Inbound Sales Certification — Similar to the Inbound Marketing Certification, this course covers the fundamentals of inbound, but it does it with a sales audience in mind. It also covers sales techniques that will help your sales team thrive in the modern world.
- "Aligned to Achieve" by Tracy Eiler and Andrea Austin — If your company is struggling with misalignment, this book is an explanation of why you need to change and how to do it.

2 Section 2

Aligning Your Teams Around a Unified Revenue Goal

With any large initiative, you need both a guiding vision and actionable goals.

"Without a sensible vision, a transformation effort can easily dissolve into a list of confusing and incompatible projects that can take the organization in the wrong direction or nowhere at all."

— John Kotter

The activities in this section will help you develop a vision that will motivate your teams and help you turn that vision into a revenue goal that can be translated into goals for your individual teams.

Want to know more?
Watch Aligning Your Teams Around a Unified Revenue Goal (9:10)

✏️ Activity 1

Designing Your Vision

Describe your organization's vision in the space below. *Remember, you aren't done with this step until you can describe your vision in five minutes in a way that gets people excited about it.*

```
┌──────────────────────────────────────────────────────────┐
│                                                          │
│                                                          │
│                                                          │
│                                                          │
│                                                          │
│                                                          │
└──────────────────────────────────────────────────────────┘
```

Once you have the vision laid out, you need figure out how much that vision will cost to achieve. Here are some resources that might help:

- Glassdoor — A website that will help you estimate salaries for anyone you need to hire.
- LoopNet — A website that will help you estimate the cost of office space in your desired location.
- Employee Benefits Study — A helpful infographic if you want to offer more benefits.

If there are other costs you need to calculate, search the internet and see what you find.

Once you have the cost of your vision figured out, answer the following questions:

- How much will it cost?
- How does that compare to the resources you have on hand?
- How much more revenue do you need to realize this vision?

Use this box to brainstorm ideas:

Additional Resources

"Leading Change: Why Transformation Efforts Fail" by John Kotter — Insights into making large organizational changes succeed, based on a ten-year study of more than 100 companies that had attempted major transformations. The above quote, as well as all of the Kotter quotes in the Sales Enablement Certification course, come from this article. (Harvard Business Review subscription required. The article is also included in this book.)

3 Section 3
Developing a Lead Qualification Framework

Now that you've defined your vision and you understand how much it costs, you need to convert it into goals for your marketing and sales teams. The first step in doing that is developing a robust lead qualification framework. After all, the more qualified a lead is, the more likely they'll help you achieve your revenue goals.

The activities in this section will walk you through the process of developing a lead qualification framework that will ensure your sales team is focusing on the best prospects.

Want to know more?
Watch Developing a Lead Qualification Framework (20:57)

Activity 1

The Ideal Customer Profile

To define a qualified lead, you have to understand what makes someone a good fit for your offering. Creating an ideal customer profile is an excellent way to do this.

An ideal customer profile is a checklist of the most basic attributes someone needs to have to be successful as your customer. The best way to create your ideal customer profile is to get representatives from both marketing and sales together to discuss what attributes your best customers have in common.

If you're in a B2B organization, your ideal customer profile will be at the company level. If you're in a B2C organization, it will be based on a particular market segment. Regardless of what space you're in, here are some questions that should help jump-start the conversation between marketing and sales:

1. Are there economic factors that make a customer ideal or not ideal?
    a. **B2B**: Number of employees, revenue, customers, etc.
    b. **B2C**: Income, education, household size, phase of life, etc.
2. Are there market segments that are ideal or not ideal?
    a. **B2B**: Industry, vertical, etc.
    b. **B2C**: Occupation, interest, lifestyle, etc.
3. Are there geographic locations that are ideal or not ideal?
4. Are there legal standards that are required to purchase your product or services?
5. Are there any other attributes that make a buyer ideal or not ideal?

As you discuss these questions, rely as much as possible on any data you have. This is especially important if marketing and sales don't work well together. "Aligned to Achieve" makes a strong argument for this:

When we rely on data, we can turn it into a fact-based conversation. We can both see exactly what's happening. Data takes the emotion out of it. It keeps you from getting defensive, especially if you approach it [by saying], "Let's both sit down and look at the data." It also helps you figure out what the true issues are and points you in the right direction to fix them. (pg. 5)

Use the box below to brainstorm ideas about your ideal customer profile — but remember, nothing is final until marketing, sales, and your customer data have all been consulted.

Activity 2
Measuring Sales Readiness

In addition to identifying what makes someone a good fit for your product, you also need to know how your prospects demonstrate that they're ready to talk to sales. A person can be a good fit for your product, but if they aren't interested in talking to you, you need to leave them alone.

To measure sales readiness, you need to identify the actions people take that are correlated with purchasing your product. Identifying these actions will be a joint effort between marketing and sales and should be based on data, if possible.

Here are some actions that you may want to consider:
1. **Interactions on your website**
   a. Content conversions
   b. Number of page views
   c. Specific pages viewed
   d. Forms submitted
   e. Live chat interactions
   f. Other activities
2. **Email engagement**
   a. Email opens
   b. Email clicks

  c. Email replies

  d. Negative metrics (SPAM, unsubscribes, etc.)

3. **Social media engagement**

  a. Following your company on various channels

  b. Engaging with social content (shares, comments, etc.)

  c. Connecting with sales

4. **Online and in-person event attendance**

  a. Register

  b. Attend

  c. Engage (comments, business cards, etc.)

Use the table below to list the actions you identified, organized by what level of interest they indicate. If possible, look at past data to see which actions most often lead to a sale — but remember, nothing is final until marketing, sales, and your customer data have all been consulted.

Activity	Level of Interest
(EXAMPLE: Submitted the "Contact Sales" form on our website.)	Hand-raiser (wants to talk to sales)
(EXAMPLE: Attended a product webinar.)	Actively investigating your product
(EXAMPLE: Follows us on Twitter.)	Passively interested in your product

(EXAMPLE: Unsubscribed from our newsletter.)	Not interested / Do not contact

✏️ **Activity 3**

The Lead Qualification Matrix

In this activity, you'll combine your ideal customer profile from **Section 3 Activity 1** with your sales readiness metrics from **Section 3 Activity 2** to create a single lead qualification matrix.

In **Section 3 Activity 1**, you brainstormed ideas for your ideal customer profile. If you haven't already, take time to discuss your ideas with other people in your company. Hold a meeting between marketing and sales to create a definition everyone agrees on. When you're done, you should be able to list out the attributes of an ideal customer as a series of checkboxes or bullet points.

If you're a B2B company, your ideal customer profile might look like this:
- Industry: Manufacturing
- Size: <1,000 employees
- Location: UK or France
- Other: NOT publicly traded

If you're a B2C company, it might look more like this:
- Age: 65+
- Income: <$75,000
- Location: Miami, Florida, USA
- Family situation: Married, no kids at home

Write your ideal customer profile here:

In most cases, your ideal customer profile will be five or six checkboxes, but it can be more or less, depending on what your teams decided. For the purposes of your lead qualification matrix, you need to determine the cut-off between good-fit and poor-fit leads.

Define the cut-off between good-fit and poor-fit leads. *How many checkboxes in your ideal customer profile does a lead have to check off to be a good-fit lead? Are there any boxes that EVERY lead MUST check off, regardless of how many other boxes they check off? Are any of the activities in the "actively investigating your product" section of* **Section 3 Activity 2** *REQUIRED before someone can talk to sales?*

You're now ready to create a lead qualification matrix. Use the template below to get started. In each box of the matrix, write either "Sales" or "Marketing" to indicate which team is in charge of the leads in that box.

	Hand Raisers	Sales Ready	Unready
Good Fit			
Bad Fit			

If you can, look at your past data to see how many leads (on average) you get in each bucket each month and what percentage of the leads in each bucket close into customers within a normal sales cycle. Put these numbers in the matrix.

Here are some questions to discuss once you know these numbers:
- Is the conversion rate between good-fit and poor-fit leads different? If it isn't, revisit your ideal customer profile and make sure it only includes attributes that are actually predictive.
- If you're getting a lot of poor-fit leads, which sources are they coming from? What can you do to improve your messaging in those channels?
- What is the difference in the conversion rate of hand raisers compared to other sales-ready leads? Is it significant enough that you might want to count hand raisers differently in your SLA? What can marketing do to generate more hand raisers?

You also need to develop a strategy for how you handle these leads and help them make progress. Here are some questions to discuss with marketing and sales:

Nurturing: *How does marketing nurture unready leads to get them sales ready?*

Qualification: How do you know when a lead has moved from being unready to being sales ready?

Notifications: How does marketing notify sales when a lead becomes sales ready? How frequently is sales notified (immediately, once a day, etc.)?

Unqualified Leads: How does sales send leads back to marketing?

Lead Details: What information needs to be included when marketing sends a lead to sales?

Data: What data do both teams need to input for the appropriate reports to be run?

Additional Resources

Email Marketing Certification — This course covers the details of lead nurturing to help your marketing team learn how to keep your prospects moving forward.

4 Section 4
Holding Your Team Accountable with a SLA

Now that you know what a qualified lead is, you're ready to go out and achieve your revenue goal. If the revenue goal you've defined is more than the revenue your sales team typically produces, don't worry — that's what sales enablement is for. In this section, you'll learn how to optimize your marketing and sales efforts so you can hit that goal.

The core of this part of your sales enablement strategy will be your sales and marketing service-level agreement (SLA), which will require marketing to provide sales with a certain number of qualified leads and require sales to contact those leads within a certain timeframe.

Want to know more?
Watch Holding Your Teams Accountable With a Service-Level Agreement (33:08)

✏️ Activity 1
The Sales and Marketing SLA

An SLA is an agreement between a service provider and its customer that guarantees a certain output. When it comes to sales and marketing, this is actually a two-way agreement, with marketing promising a certain number of leads to sales, and sales promising to contact those leads within a certain timeframe.

In this activity, you'll need your sales data for a full year, divided into quarters. You'll need to know:
- How many qualified leads did you generate?
- How many of them became sales opportunities?
- How many of those opportunities closed into customers?
- What was the value of each sale?

These numbers can be used to calculate the following key metrics:
- Lead-to-opportunity conversion rate (number of opportunities divided by total number of qualified leads).
- Opportunity-to-close conversion rate (number of new customers divided by total number of opportunities).
- Average deal size (sum of all deals divided by number of deals).

Compare different quarters of the year to see if these rates change or are steady. It's normal to have some seasonality in your sales, so be sure to take that into account as you calculate your SLA.

Fill in the numbers below:

What is your lead-to-opportunity conversion rate?	
What is your opportunity-to-close conversion rate?	
What is your average deal size?	

Now let's calculate your SLA:

What is your revenue goal? (NOTE: If your revenue goal is in annual revenue, divide it by 12 to make it a monthly goal.)	
How many deals do you need to close to achieve that goal? (Revenue goal divided by average deal size.)	
How many opportunities do you need to close that many deals? (Number of deals multiplied by opportunity-to-close conversion rate.)	
How many qualified leads do you need to generate that many opportunities? (Number of opportunities multiplied by lead-to-opportunity conversion rate.)	

That last number tells you the number of qualified leads marketing needs to send to sales each month. **That's the first half of your SLA.**

The other half is how quickly sales contacts those leads. Remember, you want your sales team to contact marketing's leads as quickly as possible. But you'll have to do some experimenting to discover what's reasonable to require of your sales team.

If you already have a set timeframe that sales is required to contact leads within, enter that into the SLA template below. Otherwise, **use 24 hours as a starting point**. Either way, always be on the lookout for ways to reduce this number. Reducing the amount of time it takes sales to follow up with qualified leads should be an ongoing discussion topic in your smarketing meetings, particularly in the early days of your SLA (see Section 4 of this guide).

Fill in the SLA template:

Every month, marketing will deliver _____ qualified leads to sales, and sales will contact each of those leads within _____ hours of receiving it.

As Mark Roberge said in the class, having an SLA like that puts you in the top 5% of companies. But you can be even better than that. Here's how:

Look at your lead qualification matrix again. Dig into your past data and see what percentage of leads in each category end up buying from you. Specifically, you want to see if your hand raisers close at a different rate than your other sales-ready leads. Chances are, hand raisers close at a much higher rate. If it's twice as much, you should allow your marketing team to count them as being twice as valuable. If it's three times as much, they should count as being three times as valuable. Whatever the case, if the conversion rates are different, you want to find a way to incentivize marketing to focus on generating the types of leads that close at a higher rate.

Mark Roberge recommends bringing in average sale value to do this. If you multiply the conversion rate of each bucket of leads by the average value of a sale made to one of those leads, you'll get the value of one lead in that category. Once you have this lead value calculated, you enter a world where you can put marketing on a quota, just like sales. That is the ideal state to get your SLA into.

It looks like this:

Every month, marketing will deliver $100,000 of lead value to sales, and sales will contact each marketing-qualified lead within 24 hours.

If you have the data to do this, run the calculations and then update your SLA here:

Every month, marketing will deliver _____ of lead value to sales, and sales will contact each marketing-qualified lead within _____ hours.

✏️ Activity 2
The Judicial Branch

To enforce the SLA, you need to organize your judicial branch. Your judicial branch will be a small group of leaders who review every lead that doesn't get contacted within the timeframe dictated by your SLA. The judicial branch will determine whether the lead was actually qualified and follow up with the appropriate team. If the judicial branch finds a lot of unqualified leads are getting passed to sales, use your smarketing meetings to reassess the lead qualification matrix until the problem is resolved.

For the judicial branch to be effective, it's paramount that its members are unbiased and focused on what's best for the company as a whole. That means that having the CMO or the SVP of Sales leading the charge is probably a bad idea, though both might be involved as members of the branch. The ultimate decision maker should be a COO or even CEO — someone whose primary interest is the success of the company and who can be trusted not to side with one team over the other.

Use the box below to brainstorm a list of people who should be involved in your judicial branch:

```



```

✏ **Activity 3**

Marketing Velocity

If your SLA requires your marketing team to produce more qualified leads than they've typically been producing, the best thing to do is to audit the way you're using your marketing production process and look for ways to reallocate resources.

In the table below, list all of the assets your marketing team currently produces (blogs, infographics, meet-ups, tradeshows, etc.). For each, indicate how many of those items you produce in a typical year, how many leads one item typically produces, and how many hours one item takes to produce.

For example: if you wanted to calculate this for blog posts, you would write "blog posts" in the "Item" column, the number of posts you publish each year in the "Volume" column, the number of leads typically produced by a single blog post in the "Leads" column, and how many hours it takes to produce a single blog post in the "Hours" column.

In the "Leads per Hour" column, divide the "Leads" by "Hours" to see how effective each item is as a function of the time it takes to produce.

In the "Total Hours" column, multiply "Volume" by "Hours" to see how many hours a year your marketing team is spending on each item.

Item	Volume	Leads	Hours	Leads per Hour	Total Hours

If you see an item that has a low "Leads per Hour," ask yourself what would happen if you took the "Total Hours" spent on that item and added them to an item with a higher "Leads per Hour." What would be required to make that change happen?

✏️ **Activity 4**

Sales Velocity

Just as you were able to calculate your marketing velocity, you can also calculate your sales velocity. The formula to do this comes from "Aligned to Achieve." There are four metrics you need to identify and measure:

- **Number of opportunities.** *How many sales opportunities can a rep handle in a given time period?* For more complicated sales where the rep has to be deeply involved throughout the process, this number might be fairly low, but for more transactional sales, it can be fairly high. This number might also vary from rep to rep, based on how much experience they have.
- **Average deal value.** *How much does a typical sale close for?* This is a key metric to know when you're initially calculating the SLA.
- **Win rates.** *What percentage of sales opportunities actually close into new business?* This is another metric you need to know to calculate the SLA, and it's an important one for both sales and marketing to keep an eye on. If this rate is low, it could be that marketing is attracting the wrong kinds of people. Revisit your ideal customer profile and make sure it's accurately reflecting the sorts of people who are most likely to close. Dig into your sales team's lost deals and see if you can find common traits that don't exist among your customers.
- **Sales cycle length.** *How long does it take your sales team to turn opportunities into customers?* Remember, the goal of sales enablement is to make your sales team more efficient, so hopefully you'll be driving this number downward soon.

Once you know these numbers, you can calculate your sales velocity using this formula:

$$sales\ velocity = \frac{(number\ of\ opportunities) \times (average\ deal\ value) \times (win\ rate)}{sales\ cycle\ length}$$

Use this space to calculate your sales velocity:

# of Opportunites		Average Deal Value		Win Rate
	X		X	

Sales Cycle Length

SALES VELOCITY = _____

Additional Resources

"Aligned to Achieve" by Tracy Eiler and Andrea Austin — This is the source of the sales velocity equation.

5 Section 5
Maintaining Alignment with Smarketing Meetings

Smarketing meetings are an important part of sales enablement. Having a regularly scheduled time for marketing and sales to come together and solve problems is crucial to ensuring the success of the strategies you're designing in this guide.

The following activities will help you plan and execute a smarketing meeting that focuses on solving problems, occurs at an optimal cadence, involves the right people, and fosters psychological safety.

Want to know more?
Watch [Maintaining Alignment With Smarketing Meetings](#) (20:24)

✏️ Activity 1

Creating a Smarketing Meeting Agenda

In smarketing meetings, identifying and addressing problems should be the top priority. The first few times you have marketing and sales meet, it will be to do the activities laid out earlier in this guide. But once you have the groundwork laid, your ongoing meetings need to focus on identifying and solving problems.

One way to do that is by using the POP model. **POP stands for purpose, outcome, process.** Purpose is the reason an item needs to be addressed in the meeting. Outcome is what needs to be accomplished before the meeting ends. Process is the way that outcome is going to be produced.

You can have a rule that requires every item on your smarketing agenda to have a POP. Here's an example:

> **Marketing's leads aren't closing at the expected rate**
> **Purpose:** Figure out why the close rate for marketing's leads is low and fix it.
> **Outcome:** Specific action items for fixing the close rate.
> **Process:** Identify the source of the problem, develop a possible solution, and create a plan to implement that solution.

Notice that the name of the agenda item is the problem at hand, and then the POP is clearly defined. If this is the standard format for all of your agenda items, your smarketing meetings will stay focused and be productive.

Use the box below to practice writing agenda items using the POP model:

```



```

Additional Resources
"The Fabulous Pop Model" by the Social Transformation Project — A PDF document explaining the POP model in depth.

✏️ Activity 2

Defining Your Smarketing Schedule and Attendee List

As you think about who should attend your smarketing meetings, the main rule you'll want to keep in mind is this: *Don't let the attendee list exceed 10 people.*

If you're a small company and your entire marketing and sales organization is less than 10 people, start by inviting everyone. If there are more than 10 people in your marketing and sales organization, you'll have to define a system for deciding who gets invited to each meeting. You might consider setting up a rotation so each team member gets a turn.

If you have an especially large marketing and sales organization, a rotation can take so long that individual team members might not get an opportunity to attend smarketing meetings regularly. In this case, you can create multiple smarketing meetings, based on sales territories or other organizational divisions in your departments. This will enable your teams to focus on problems unique to working with the people in their jurisdictions, which will help them create more relevant, personalized solutions for those groups.

Use the box below to describe how your smarketing meetings should be organized.
Is everyone in marketing and sales going to attend every meeting, or will you need to have rotations and divisions to keep the group small? How frequently will these meetings occur? (Remember, the default is to start meeting every two weeks and then adjust as needed.)

```



```

✏️ **Activity 3**

Running a Smarketing Meeting

In order for your smarketing meetings to be productive and collaborative, you need to ensure they foster psychological safety. If smarketing meetings have a high level of psychological safety, team members will be comfortable taking risks around each other. They won't be afraid of getting in trouble for admitting mistakes or asking questions or suggesting new ideas. If your meetings lack psychological safety, attendees will be hesitant to contribute or make suggestions.

Google's re:Work team has some great resources on this topic. Here is a long list of suggestions to help the leader of your smarketing meetings foster psychological safety. Suggestions include:
- Respond to ideas verbally to show engagement ("That makes sense. Tell us more.").
- Recap what's been said to confirm mutual understanding and alignment ("What I heard you say is…").
- Avoid placing blame ("Why did you do this?") and focus on solutions ("How can we work toward making sure this goes more smoothly next time?").

Use the box below to brainstorm ways you want to foster psychological safety:

Additional Resources
- "Smarter Faster Better" by Charles Duhigg — The whole book is worth reading, but there's a chapter on teams that gives excellent examples of how to run a high-performing team.
- "Understanding Team Effectiveness" by Google re:Work — A guide from Google's re:Work team that will help you make your teams more productive. It includes the PDF worksheet linked above.

6 Being a Hero to Your Customers

Defining your target buyer is a vital part of sales enablement. If you implement the processes, content, and technology necessary to accelerate your sales, but you don't know how to target the best prospects, there's a good chance you'll accelerate yourself right into a dead end. Having a clear definition of your target buyer will prevent that from happening.

✏️ Activity 1

Developing Buyer Personas

If you want to sell efficiently at a higher velocity, you need a deep understanding of the people who tend to buy from you. A great way to get that understanding is to create a buyer persona. A buyer persona is a semi-fictional representation of your target customer based on data.

Want to know more?
Watch Using Buyer Personas in Sales Enablement (20:51)
Read How to Create Detailed Buyer Personas for Your Business (blog post)

In order to truly understand your persona, you'll need to interview customers and prospects to look for patterns. As you do this, fill in the boxes below based on the patterns you discover.

1. What's your primary buyer persona's background? *(Job? Career path? Family?)*

2. What are your primary buyer persona's demographic traits? *(Male or female? Age? Income? Location?)*

3. What are your primary buyer persona's identifiers? *(Demeanor? Communication preferences?)*

```
```

4. What are your primary buyer persona's goals? *(Primary goal? Secondary goal?)*

```
```

5. What are your primary buyer persona's challenges? *(Primary challenge? Secondary challenge?)*

```
```

Additional Resources
- [Inbound Fundamentals](#) — A brief, online lesson that covers the basics of an inbound strategy, including how to create and use personas.
- [MakeMyPersona](#) — This online tool will help you organize the information you gather in your research.

✏️ **Activity 2**

Identifying Jobs to Be Done

Now that you have your persona figured out, you need to uncover the job they're hiring your product to do. To do this, you're going to need to interview some more customers. Interviewing customers to figure out their job to be done is a delicate process. When you interviewed customers to identify your personas, you were looking for answers to specific questions. When it comes to identifying a job to be done, you're trying to storyboard the sequence of events that led a person to buy your product and uncover the underlying job they were trying to get done.

There are a lot of good resources available to help with figuring out jobs to be done. One thing to keep in mind, though, is that most of them are intended to help product designers. For the purposes of marketing and sales, you should focus more on how you can help people understand the job your product does, rather than trying to think of ways to improve your product to do the job better.

Want to know more?
Watch Using Jobs to Be Done in Sales Enablement (27:31)
Read A Script to Kickstart Your Jobs to Be Done Interviews (article)
Read Jobs to Be Done Interview Script (Medium post)
Read A Template for JTBD Interviews (article)

Once you've completed the interviews and laid out the stories, you're going to look for a job that explains all of the stories equally well.

As you try to define your customers' job to be done, fit it into this standard "job story" template:

When _____, I want to _____ so that I can _____.

Every job is tied to a specific circumstance. In the example of the McDonald's milkshake, the situation was the morning commute. The first blank in the template above captures the circumstance where the job arises. So the job story for the McDonald's milkshake might look something like this:

When I'm commuting to work, I want to eat something so that I have something to keep me occupied during my commute and keep me feeling full until 10:00 a.m.

Use the box below to write your customers' job story:

```



```

Once you have your job story, you can start to think about other products that might get hired to do this job. Use this box to list as many products as you can think of that you might be competing with:

Now look at the list of competitors you just created. Are there any you might be able to form alliances with to provide better coverage for the job your product helps people get done? Brainstorm possible alliances here:

```



```

Additional Resources
"Competing Against Luck" by Clay Christensen — Professor Christensen's book about Jobs to be Done.

✏️ Activity 3

Who Do You Want to Be a Hero to?

Now that you know who your persona is and what job they're trying to get done, you're ready to create your hero statement.

Here is the format of the hero statement:

> *[Your company] is a hero to [buyer persona] who [job to be done].*

If you haven't fully defined your primary buyer persona yet, you can use your ideal customer profile as a first version of your hero statement. Remember, Janet Comenos founded Spotted Media using

an ideal customer profile and then defined personas later based on further research and customer conversations. Remember, too, that Spotted is focused on how to help those people get promoted — helping someone get promoted is a great way to be a hero.

Want to know more?
Watch [Creating a Hero Statement](#) (19:25)
Use the space below to write your company's hero statement. If you use your ideal customer profile, that's okay as a temporary solution, but be sure to revisit this activity once you know who your primary buyer persona is, and update your hero statement to include it.

✏️ Activity 4

Who Aren't You a Hero to?

Now that you know who you're a hero to, you need to put some thought into who you aren't going to be a hero to. Here's an instructive story from "Competing Against Luck" by Clay Christensen:

I recently read an account of a local restaurateur who rued the great reviews he initially got on Yelp because they drove higher-end foodies to his restaurant in search of discovering a hidden gem. His restaurant was, he pointed out, a decent local place. But somehow foodies, who he never attended to attract in the first place, ended up disappointed and wrote bad reviews. (pg. 148)

Judging by the fact that this restaurant received so many positive online reviews, it's a safe bet that they were a hero to a lot of people looking for a decent meal. But they can't do that and simultaneously be a hero to people looking for gourmet dining.

What would you recommend the restaurant owner do? What are some creative ways he could communicate to local foodies that his isn't the best restaurant for them to patronize?

Now think about your own solution. Are there people who are attracted to it even though they aren't a great fit for your company? What can you do to help them understand that you won't be able to be a hero to them? Use the box below to brainstorm some ideas:

7 Section 7
Content's Role in Sales Enablement

Content is a vital part of sales enablement. After all, sales enablement is the processes, content, and technology that help sales teams sell efficiently at a higher velocity. The activities in this section will help you develop a content strategy that will live at the heart of your sales enablement efforts.

Want to know more?
Watch The Power of Content in Sales Enablement (24:42)

✎ Activity 1
Using Content to Enable Sales

Think about your persona and the job they have to be done.
What questions are they trying to get answered? If you don't know, talk to your sales team and see what questions they're required to answer on a regular basis.

Use this box to collect as many questions as you can:

For every question in the box above, you'll want to create a piece of content that answers the question and publish it on your website. If there are questions that can be answered thoroughly in just a few sentences, collect them into a "frequently asked questions" page. More complicated questions should each get their own page, with a title that includes the question.

Use this box to brainstorm the best places to publish content answering each question you identified:

```


```

Once you have that content created, start thinking of ways you can package the most important content in a way that can be given to sales prospects. Use this box to brainstorm the most important pieces of content for sales prospects to consume:

```


```

Finally, draft an email template that your sales team can use to share this content with their prospects. Include links to each relevant piece of content — or, if you've packaged all of the pages together into a longer piece of content, such as an ebook, include that instead. Make it clear to the prospect that this content should answer most of their questions so that the time on the sales call can be spent discussing their unique needs.

Use this space to draft your email template (or click here to go to the template tool in HubSpot):

```


```

How confident are you in your ability to get your sales team to use this email template with every sales prospect? Who would you need to work with to make that happen?

Use this space to brainstorm ideas:

```




```

Additional Resources
- "They Ask, You Answer" by Marcus Sheridan — An easy read chock full of explanations of how to make content work for your company. The final section includes an outline for running a workshop to transform your company into a content-creation machine.
- Content Marketing Certification — Everything you need to know about content marketing. It also includes a free workbook.

✏️ Activity 2

Designing a Content Manager

In order for your content strategy to really take off, you need to have a content manager leading the charge. As Marcus Sheridan said in the Sales Enablement Certification course, "Unless somebody owns it who's not wearing 15 other hats, you never do great work. It's impossible."

Want to know more?
Watch "Designating a Content Manager" (2:29)

In his book, "They Ask, You Answer," Marcus dedicates an entire chapter to explaining how to hire a content manager and what their duties should look like. In short, he recommends flipping the interview process by having the candidate ask you questions about a particular topic and then take that information and produce a piece of content. Have each candidate do this for the same topic, and then hire the person who produced the best piece of content.

This process will work regardless of whether you're evaluating internal or external candidates or a mix of both.

Who in your company would be in charge of hiring or designating a content manager? What would the process be for hiring a content manager?

```




```

Do you think there is someone within your company who would do well as a content manager, or will an external search be required? If there are people you think would be good at the job, list their names here:

Look at the questions you wrote in **Section 7 Activity 1**. Which of these would be the best one to have a potential content manager answer through content? Brainstorm ideas here:

Additional Resources
- [Content Marketing Certification](#) — Everything you need to know about content marketing. It also includes [a free workbook](#).
- ["They Ask, You Answer"](#) by Marcus Sheridan — A short, actionable book explaining how to get your content strategy off the ground. Includes instructions for hiring a content manager.

Activity 3
Involving Sales in Content Creation

In "Social Selling Mastery," Jamie Shanks gives us this disheartening statistic:

> [A]ccording to SiriusDecisions, "Up to 65% of your marketing team's digital content never makes its way into the customer's hands." [...] Let's put that into context within your organization. Your digital marketing team will spend about five hours of their eight-hour day in activities that do nothing more than spin its wheels! (pg. 162)

The only surefire way to avoid this problem is to involve sales in the content creation process. If your sales team feels ownership over the content, and if they get to help decide what topics are addressed, they'll be far more likely to use marketing content.

The Sales Enablement Certification course gives several suggestions for fixing this problem:

- Marcus Sheridan recommends having the sales team BCC the marketing team anytime they answer a question over email.
- Jen Spencer listens to sales calls to make sure she understands the questions prospects are asking. She also has her marketing team produce blog posts on behalf of the sales reps, and then the rep reviews the post and makes revisions as necessary before publishing it under their own name.
- Bertrand Hazard recommends asking individual sales reps, "What's stopping you from selling?" From the list of problems the rep gives you, find one you can work on and then go and solve it. Once you show yourself to be a problem solver, the sales rep will start to trust you and be more willing to collaborate with you on content creation.

Want to know more?
Watch "Getting Sales Involved in Content Creation" (9:46)

Use this space to brainstorm ideas for getting your sales team involved in the content creation process:

Activity 4

Assembling Your Insights Committee

When it comes to involving people from other departments in creating content, one of the best things you can do is make them part of a committee. In "The Sales Acceleration Formula," Mark Roberge encourages companies to develop a "journalistic capability [...] to drive the modern demand generation process."

He gives three steps for doing this:
1. Get a content manager. He recommends a professional journalist, or at least a student from the journalism program at a local college, to ensure that they have the skills necessary to interview people and turn those interviews into content.
2. Form a committee made up of anyone at your company who understands "your industry, your product value proposition, [or] your customer's needs." This might be executives, salespeople, customer support people, engineers, etc.
3. Once or twice a week, have the content manager interview one member of the committee for one hour and then take the information from the interviews and turn it into blog posts, ebooks, social posts, and other content.

Want to know more?
Watch "[Making Content a Company-Wide Initiative](#)" (6:37)

Use this box to brainstorm a list of people whose perspectives would be valuable in an insights committee. Once you know who you want to be on the committee, start asking people to join.

✏️ Activity 5

Your Customer Enablement Strategy

Your sales enablement efforts should extend beyond the actual sale. Your customers need your help, and if you enable their success, they'll reward you with return business and long-term loyalty.

Want to know more?
Watch [Continuing Enablement After the Sale](#) (21:28)

Review **Section 6 Activity 2**, where you examined your customers' job to be done. When someone hires your product to do that job, what other solutions might they have to fire? Even if they weren't using a product previously, they'll need to hire whatever workarounds were helping them make do. In
"Competing Against Luck," Clay Christensen writes:

> *Before a customer hires any new product, you have to understand what he'll need to
> fire in order to hire yours. Companies don't think about this enough. Something
> always needs to get fired. (pg. 120)*

Use this box to brainstorm the solutions your customers might need help firing. What can you do to help them?

You also want to look for helpful ways to encourage your customers to buy again. Look at the job story you created in **Section 6 Activity 2**. What is the circumstance when your customers' job arises? Is it predictable? How can you make yourself present when that circumstance comes up? How can you offer to help them?

Use this box to brainstorm ideas:

It's also important to keep in mind that, even if you're hyperfocused on only serving the people you can be a hero to, people might hire your solution to do a job other than the one it was designed to do. What are all the jobs someone might hire your product to do? How can you target your customer enablement efforts to the people who need to do the job you can help with?

Use this box to brainstorm ideas:

8 | Section 8
Technology's Role in Sales Enablement

Now that you have your processes and content all figured out, it's time to think about technology. Technology can do a lot to accelerate and simplify your processes and help you create and organize content. Use the questions in this section to determine the current state of technology at your company and whether any changes are needed.

Want to know more?
Watch [Evaluating Sales Enablement Technology](#) (17:19)

✏️ Activity 1
Technology Audit

The Sales Enablement Certification course makes a distinction between your technological core and edges. The core is your foundational systems, such as a CRM, marketing automation platform, and content management system. These are the tools that are most vital to your marketing and sales teams' overall ability to function.

Use this box to list the core systems for your marketing and sales teams (they might be different from each other):

In order for your sales enablement efforts to succeed, there needs to be a "single source of truth" between marketing and sales — meaning one system that contains all of the data that marketing and sales decisions will be based on.

Do you currently have a single source of truth? If so, what is it? _____

Next, think about your edge technologies. These are point solutions that accomplish specific marketing and sales actions.
For example, you might have a live chat tool you use, and an email automation system, and whatever platform your website is built on, and these might all be separate tools.

List all of the edge systems your marketing and sales teams use:

```
┌──────────────────────────────────────────────────────────────────────────┐
│                                                                            │
│                                                                            │
│                                                                            │
│                                                                            │
│                                                                            │
│                                                                            │
│                                                                            │
└──────────────────────────────────────────────────────────────────────────┘
```

Looking at the list of edge technologies you listed above, what sort of integration do they have with your core system? Some might be seamlessly integrated with your core; others might be completely separate from it. Most will probably fall somewhere in between.

Are there any integrations that are unreliable? Do you ever wind up with duplicate or lost information?

In this box, write a few sentences describing the quality of the integration between your core and edges:

```
┌──────────────────────────────────────────────────────────────────────────┐
│                                                                            │
│                                                                            │
│                                                                            │
│                                                                            │
│                                                                            │
│                                                                            │
└──────────────────────────────────────────────────────────────────────────┘
```

The last thing to consider is gaps. Are there any places you need a solution but don't have one? Are there pieces of your tech stack that you hired to do a certain job but they aren't doing it well?

Use this box to describe your current technological needs:

```
┌──────────────────────────────────────────────────────────────────────────┐
│                                                                            │
│                                                                            │
│                                                                            │
│                                                                            │
│                                                                            │
└──────────────────────────────────────────────────────────────────────────┘
```

Have other people from your company answer the questions in the activity as well. Does their assessment of your current technology match yours? Are there problems you both agree need to be solved? What's the best place to start?

Additional Resources
"Aligned to Achieve" by Tracy Eiler and Andrea Austin — The book includes several insightful aspects of technology to consider.