



State of
SALES
ENABLEMENT PRO
Report 2019





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Executive Summary

Over the past four years, the State of Sales Enablement report has been tracking the growth, maturity, and business impact of sales enablement. This year, we surveyed 513 executives, sales enablement professionals, and sales and marketing leaders across the globe to check the pulse on how sales enablement is perceived, utilized, and creating value for companies of all sizes.

Sales enablement unlocks tangible business gains in the form of increased win rates, quota attainment, retention, and collaboration. To bring these results to fruition, sales enablement requires commitment, formalization, and alignment with key stakeholders. Companies should leverage this report's evidence and best practices to define a sales enablement strategy that empowers their sales teams and leads to material business gains.

As demonstrated by this report, success from sales enablement does not come overnight. Earlier adopters are beginning to reap its benefits and see a significant impact, paving the way for those just starting their sales enablement journey. With the lessons learned from pioneers in sales enablement, those now tasked with implementation can avoid many of the pitfalls that their peers faced before them.

Key Findings

- ❖ **Formal sales enablement charters** have a tangible business impact. Those with a formal charter, vision, and strategy for sales enablement achieve 12% higher win rates, and reported the number of reps achieving quota attainment was 35% better compared to those without.
- ❖ **Organizational structure** impacts the results of sales enablement initiatives. Sales enablement teams that report into a revenue leader had win rates 18 percentage points higher compared to those who report to a human resources leader.
- ❖ **Alignment** between departments significantly improved with sales enablement. Organizations with sales enablement were twice as likely to engage in formal cross-department collaboration.
- ❖ **Investment** in sales enablement by way of tools and time practicing is beneficial. Those that have had such investment for more than two years reported 13% higher win rates, 11% higher quota attainment, and 25% reduction in sales rep turnover.

Sales Enablement Adoption

Does your company have any type of sales enablement process and/or practices?

61%

Yes

18%

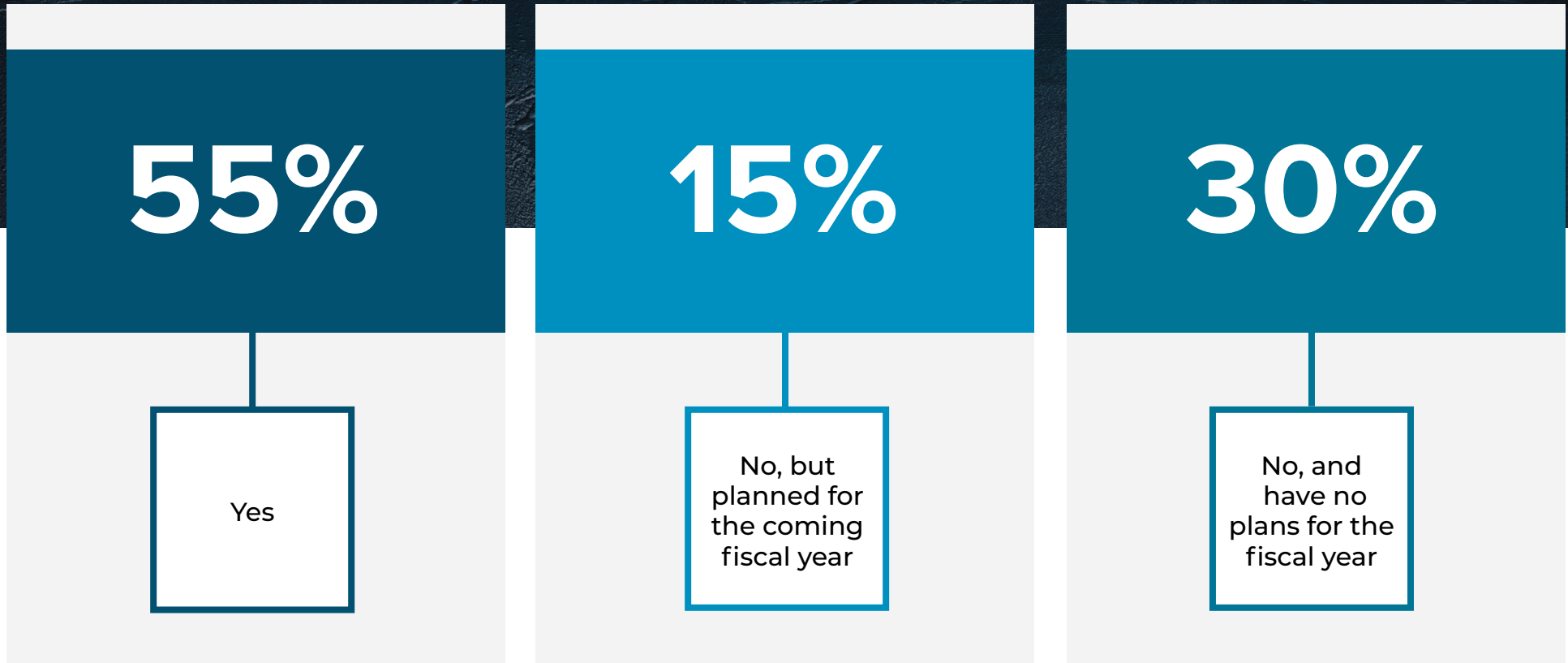
No, but
planned for
the coming
fiscal year

21%

No, and
have no
plans for the
fiscal year

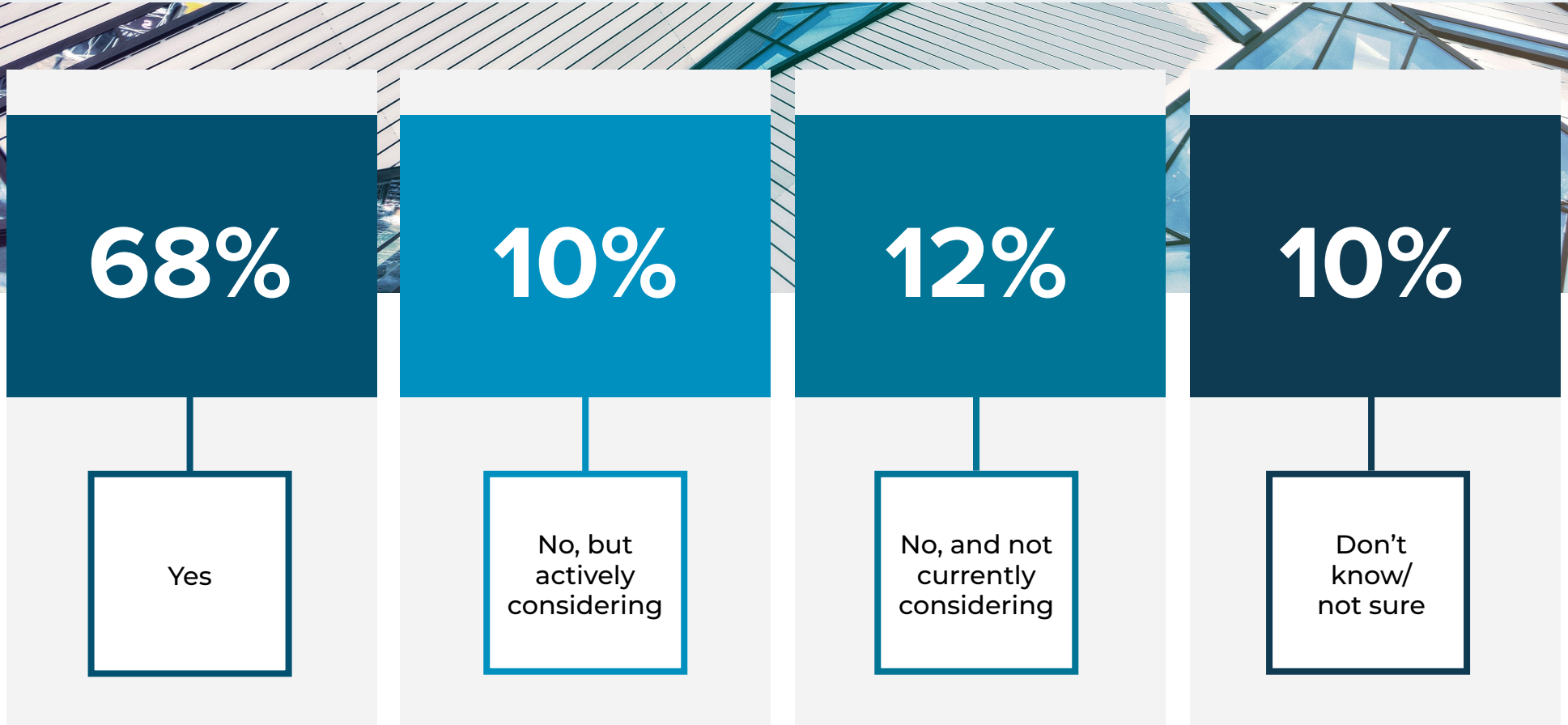
PROCESS - Sales enablement is gaining widespread adoption as more organizations are realizing its impact on sales effectiveness. In fact, more than 79% of this year's survey respondents have a sales enablement process or practice in place or plan on implementing one this year. This represents a 20% year-over-year growth from last year's survey. As more organizations adopt sales enablement, there is an increased appetite by companies and sales enablement practitioners to understand best practices.

Does your company have a dedicated sales enablement person, program, or function?



PEOPLE - Aligned with the broad adoption trends we are seeing in this year's survey, 70% of respondents said they already have a dedicated function that is responsible for sales enablement or that they plan to have one in place this year.

Is your company or team currently utilizing purchased sales enablement tools?



TOOLS - There is also a clear correlation between the increased focus on sales enablement as a function and the adoption of technologies that support those sales enablement efforts. 68% of organizations now report having a dedicated sales enablement tool.

Process + People + Tools

As sales enablement grows in popularity, organizations are beginning to take a more structured approach to sales enablement implementation by putting tools, people, and process frameworks in place to ensure its success.

However, among the 68% of respondents that reported having a dedicated sales enablement tool, there still appears to be tool confusion in the market. When asked to identify the sales enablement tools in use, more than 150 different tools were identified by respondents.

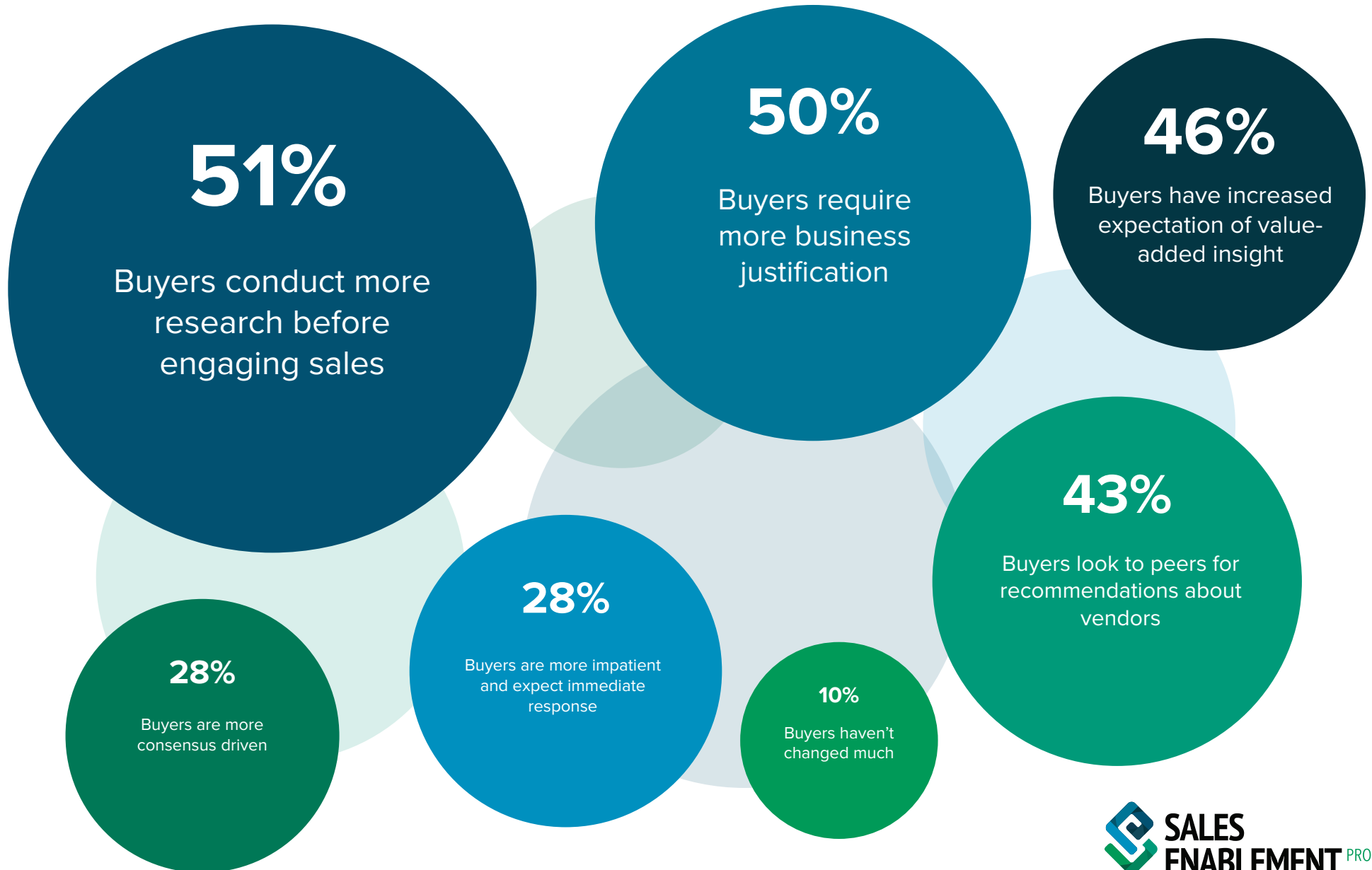
Which sales enablement tools are you aware of?



Sales Enablement Drivers

How do you think your buyers have changed in the last 12-18 months?

In today's modern business market, the dynamic between buyer and seller is quickly changing. The participants surveyed revealed three major changes they have noticed in buyers over the past 12 to 18 months. First, over half of respondents (51%) said buyers conduct more research prior to engaging sales. Second, 50% think that buyers require more business justification when making decisions. Finally, 46% believe buyers have an increased expectation of value-added insight.



What are your top three sales challenges?

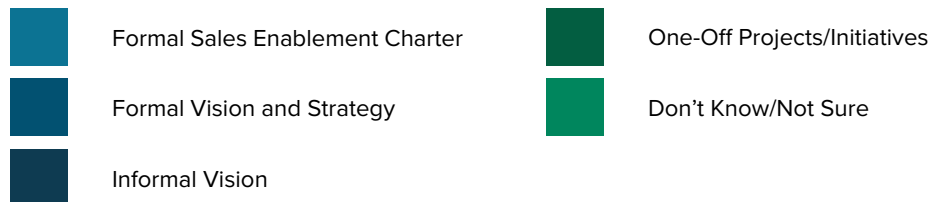
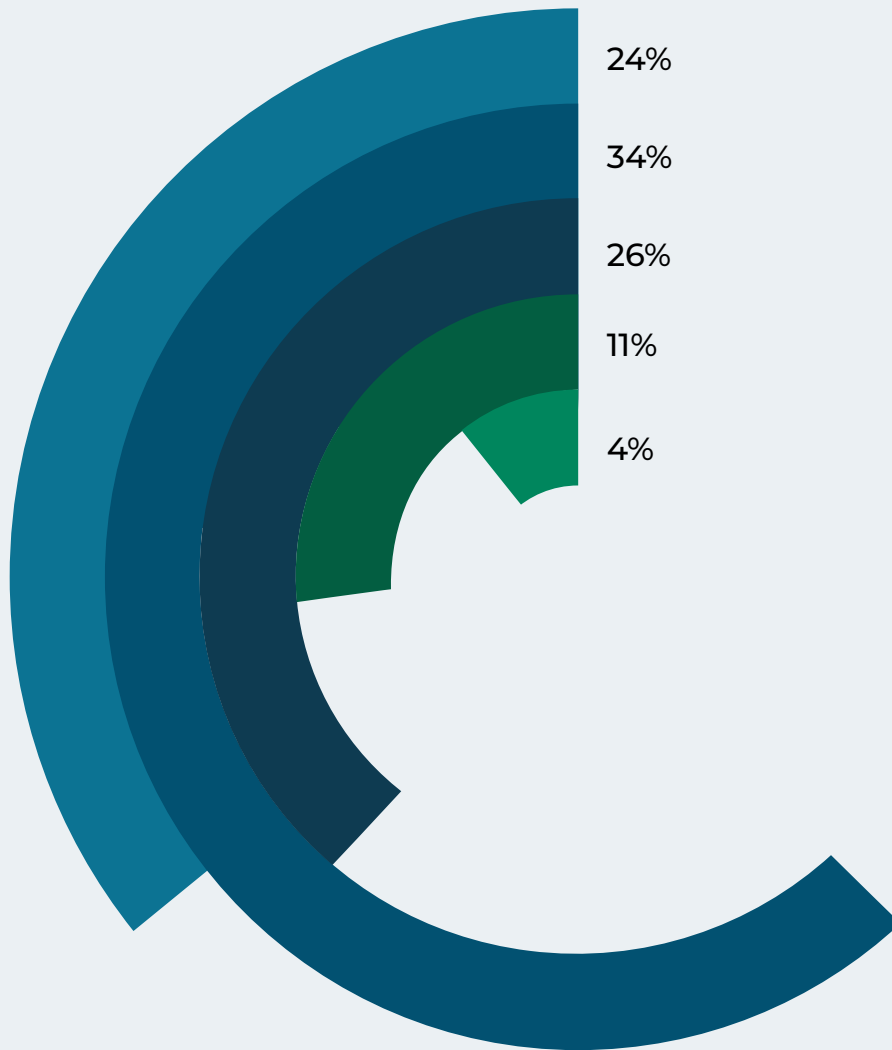


The changing behaviors of buyers have created new points of friction for sales organizations as they struggle to adapt to the evolving needs of the market. The top challenges sales organizations experience include: competitive pressure, which nearly 61% of respondents see; hiring great talent, as indicated by 47%; and customer experience and retention for 45%.

With the rapid pace of market changes showing no signs of slowing and rising challenges evident as a result, it's imperative for sales organizations to respond quickly and effectively.

Sales Enablement Maturity

Which of the following best describes your company's approach to sales enablement?



This year's report showed a growing trend of organizations formalizing their approach to sales enablement.

More than half of the survey respondents reported that they have more formal approaches to sales enablement at their organization. 24% of companies have a formal sales enablement charter, encompassing vision and strategy, responsibilities, roadmap, and success metrics. Additionally, 34% have a formal vision and strategy for sales enablement's responsibilities, though no defined charter.

We found that those with more formal approaches to sales enablement performed better overall than other companies. They experienced improved win rates, quota attainment, retention, and collaboration and reported increased business success as a result of sales enablement.

Formal Approaches to Sales Enablement Perform Better

12%

Organizations with a formal sales enablement charter report a 49% win rate, which is 12% higher compared to those without.

35%

Those with a formal sales enablement charter reported the number of reps achieving quota attainment was 35% better compared to those without.

15%

Organizations with a formal sales enablement charter experienced 15% less turnover than those without.

Formal Sales Enablement Improves Collaboration

The existence of a formal charter increases other valuable activities including collaboration and alignment across departments within an organization. Among the respondents, those who said they had a formal charter were **twice as likely** to engage in formal collaboration than those who said they had an informal vision. Respondents also reported that formal collaboration is highly unlikely to occur in organizations with one-off sales enablement projects/initiatives.

Improvement in Collaboration

Formal sales enablement charter



Formal vision and strategy



Informal vision



One-off projects/initiatives

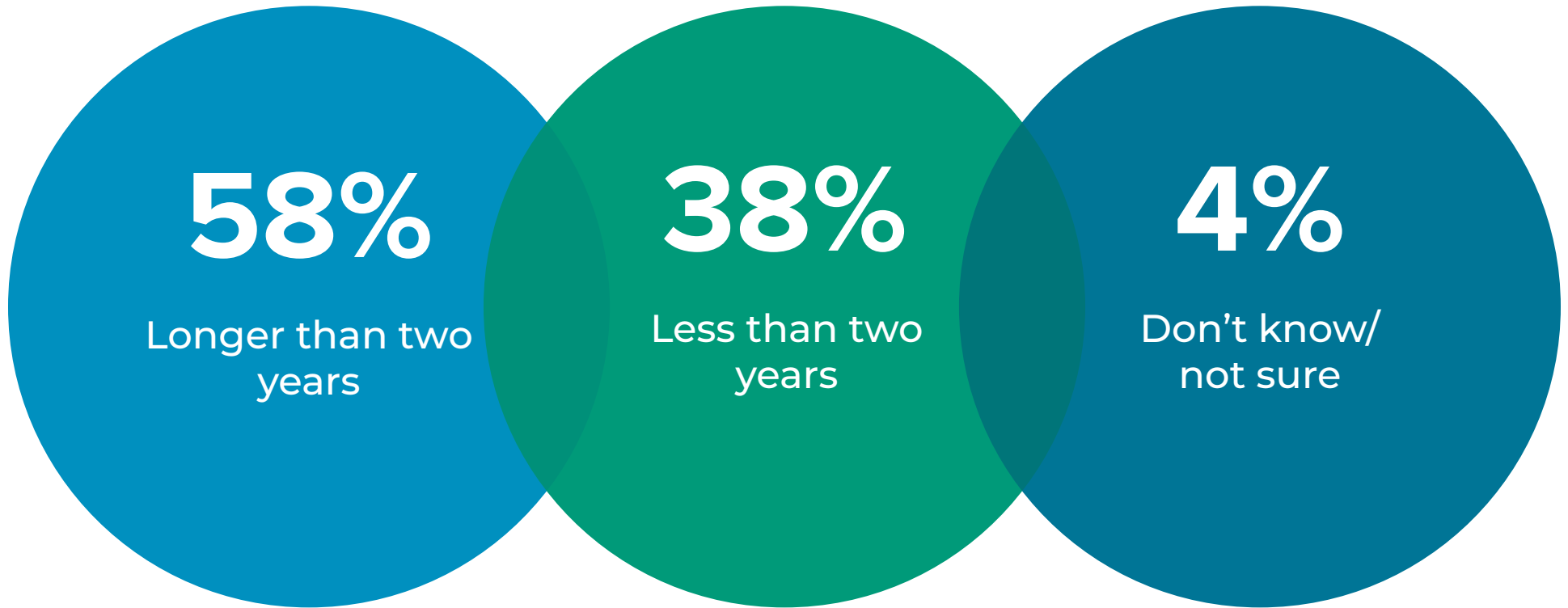


0 Percent of Respondents 100

- Formal collaboration w/ defined roles/responsibilities
- Collaboration w/ an understanding of roles/responsibilities
- Collaboration on a random/ad-hoc basis
- Don't know/not sure



How long has your company had any type of sales enablement process and/or practices?



Sales enablement is becoming well-established within early-adopter organizations that began their sales enablement journey more than two years ago. Over half (58%) of respondents have had sales enablement processes or practices in place at their organization for longer than two years.

Sales Enablement Maturity Drives Win Rate

Those organizations that were early to adopt sales enablement processes or practices are showing significant improvement in win rates. Those that have had a sales enablement process or practice in place longer than two years demonstrated a win rate that was 6 percentage points higher.

Win Rate

43%

Less than two
years

49%

Longer than two
years

Sales Enablement Maturity Drives Quota Attainment

Companies see greater quota attainment the longer they have had a sales enablement process or practice in place. For companies using a process or practice for longer than two years, they experience 56% quota attainment compared to those with less established practices at 51% quota attainment.

These results indicate that when a company has a formal sales enablement charter in place, they see higher quota attainment. And the longer companies have had sales enablement, the better the results.

Quota Attainment

51%

Less than two
years

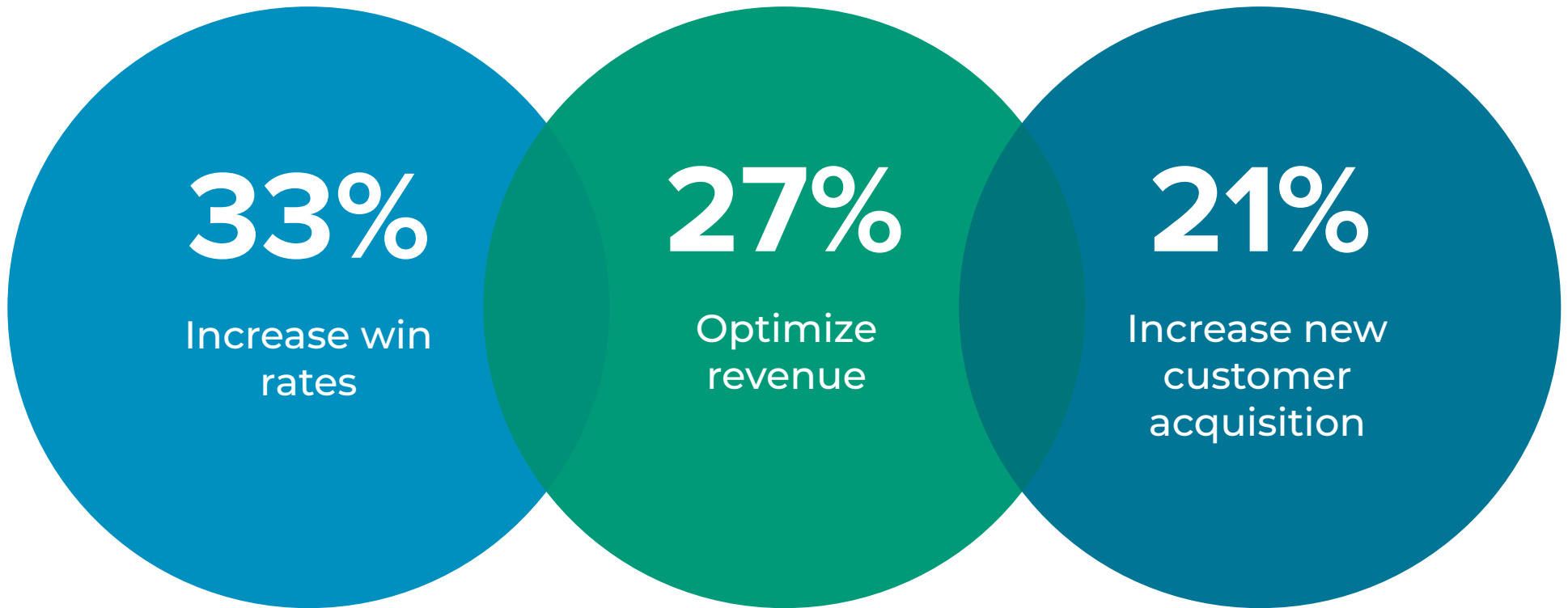
56%

Longer than two
years

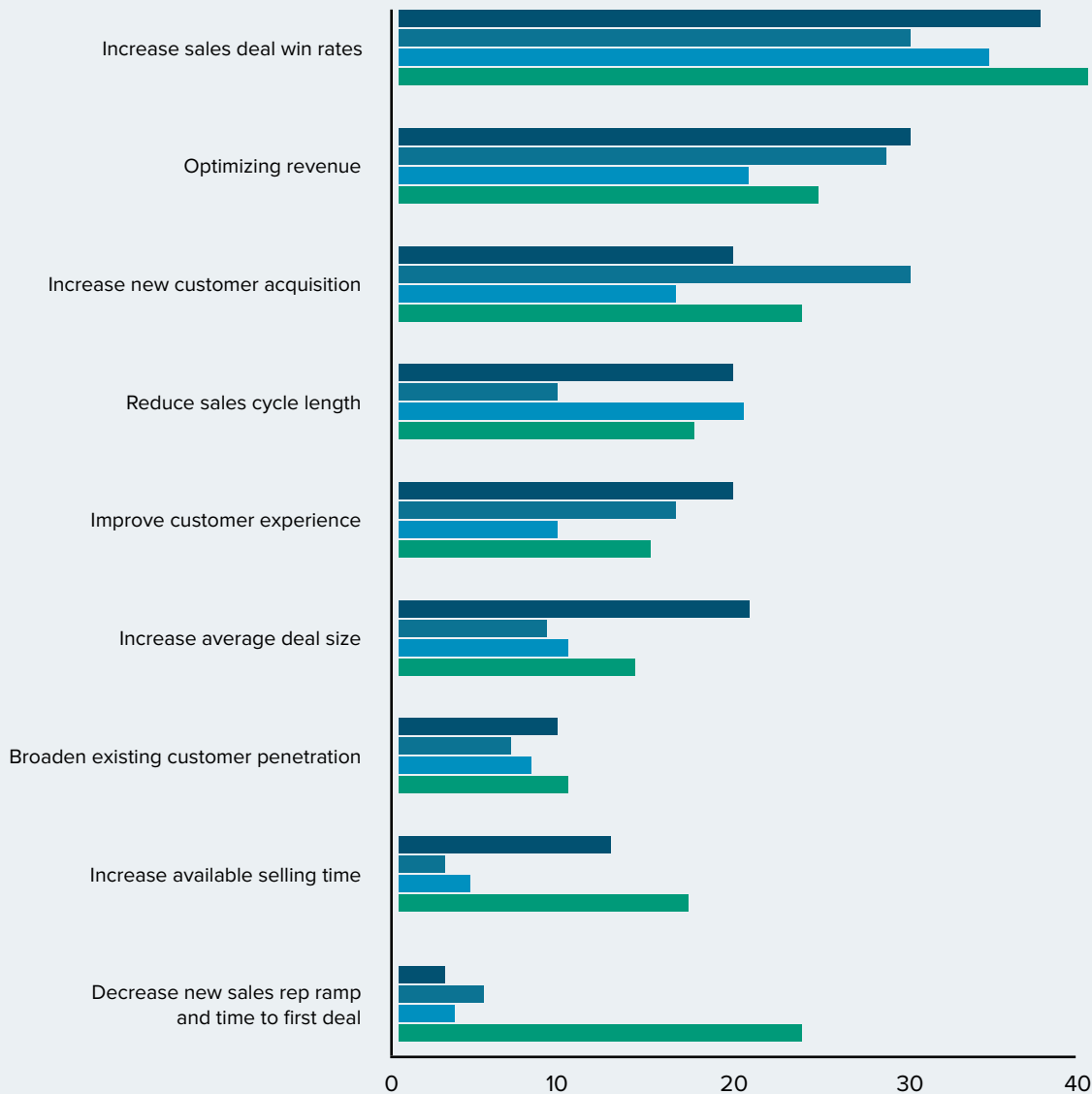
Sales Enablement Goals and Scope

What are the top three goals for sales enablement at your organization?

When considering how to put sales enablement to work for their own organizations, respondents prioritize the following goals for enablement: increase win rates, according to 33% of respondents; optimize revenue for 27%; and increase new customer acquisition for 21%.



Sales enablement goals by roles (stakeholders)



When broken down by persona, however, the importance hierarchy of these success factors varies. Across the board, increasing win rates is the most important success factor for each persona. For marketing leaders, the second most important success factor is increasing new customer acquisition, which was rated as a top priority by 30% of the marketing leaders surveyed. Sales leaders, on the other hand, find optimizing revenue and reducing sales cycle length equally important, as both were rated as a top priority by 21% of the sales leaders surveyed.

While some success factors differ based on the responsibilities of each persona and their perception of importance, there is a general consensus around what the top two goals should be for sales enablement: increasing sales deal win rates and optimizing revenue.

In terms of services for which sales enablement is the most involved or oversees, the most common areas are: training services at 43%; sales process improvements at 36%; onboarding and coaching, each at 30%; and content management at 27%.

The respondents also identified sales tools technology management at 27% and CRM technology at 26%.

While they are not the leading priorities, it does beg the question of whether we will begin to see a delineation in ownership over certain technology between operations and enablement.

Services where sales enablement is heavily involved or the primary owner

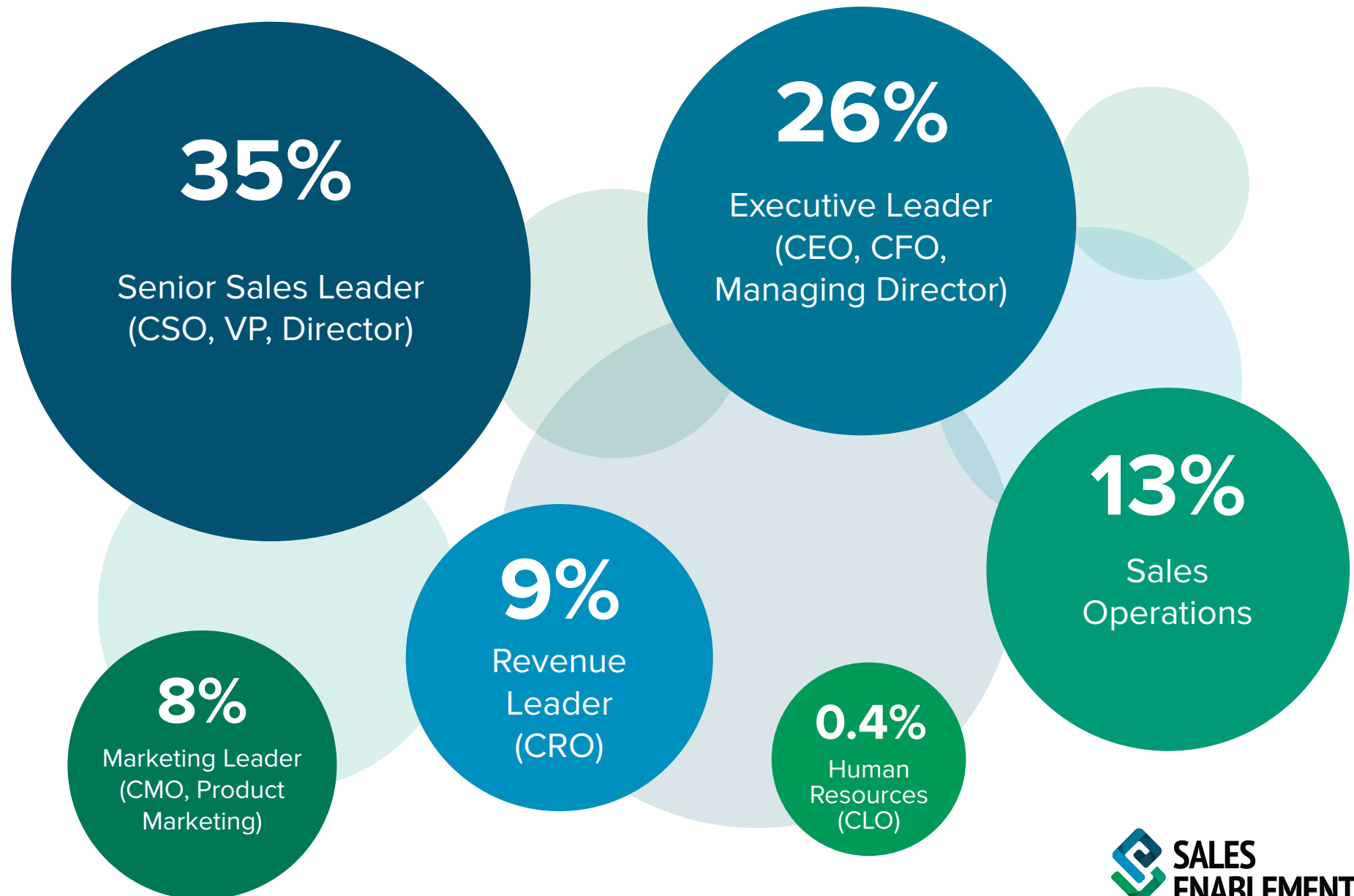


Sales Enablement Org Structure

Where does sales enablement directly report into?

In terms of organizational structure, sales enablement has historically reported into a variety of departments across the company. However in this year's report, we are starting to see a growing majority reporting directly into a sales leader (35%). There is also an increasing trend where 26% report directly into an executive leader.

Meanwhile, there also appears to be a shift away from reporting to a marketing leader, as that accounts for just 8%.



While there is no clear standard for where sales enablement reports, organizational structure does have an impact on business success, so companies should assess how their organizational structure can impact enablement's effectiveness.

Organizations where sales enablement reports to the revenue leader achieve the highest win rates, at 58%, while those reporting into an executive leader or sales leader were at 49% and 47% respectively.

The further sales enablement reports into revenue stakeholders, such as revenue leaders, sales leaders, and executive leaders, the larger business impact it can create. This is seen in our survey as those who report into a revenue leader had win rates 18 percentage points higher compared to those who report to a human resources leader.

Improvements in Win Rate

47%

Senior Sales Leader
(CSO, VP, Director)

49%

Executive Leader
(CEO, CFO)

41%

Sales
Operations

58%

Revenue Leader
(CRO)

46%

Marketing Leader
(CMO, Product Marketing)

40%

Human Resources
(CLO)



The Business Impact of Sales Enablement

The more committed an organization is to sales enablement, the more value it brings. We found that by and large, businesses with the processes, people, and tools in place dedicated to sales enablement saw higher win rates and quota attainment, and lower turnover. As detailed in this section, the business impact as a result of sales enablement is maximized when it is well resourced.

13%

Organizations utilizing sales enablement tools for more than two years have 13% higher win rates compared to those without.

11%

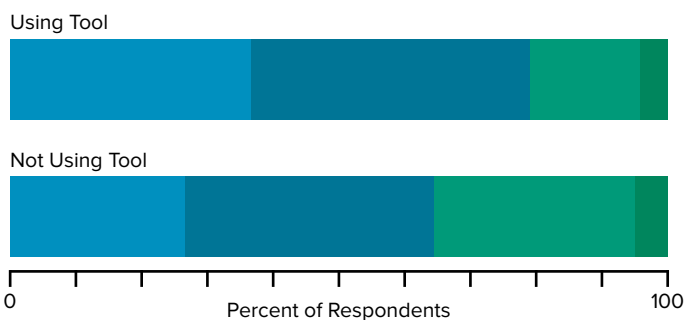
Organizations utilizing sales enablement tools for more than two years have 11% higher quota attainment compared to those without.

25%

Similarly, organizations that utilize sales enablement tools also experience 25% less rep turnover than those without.

Organizations that utilize a purchased sales enablement tool have better, more formal collaboration with defined roles and responsibilities and routine processes. On average, organizations with tools in place are 20% more likely to engage in formal collaboration than those without.

Improvement in Collaboration with Tool



- Formal collaboration w/ defined roles/responsibilities
- Collaboration w/ an understanding of roles/responsibilities
- Collaboration on a random/ad-hoc basis
- Don't know/not sure





Conclusion

As sales enablement grows in adoption and becomes more utilized across industries and regions, it is ascending to become table stakes for effective, modern sales. However, it requires thoughtful planning and coordinated implementation to be successful. This report's findings underscore the importance of commitment, formalization, and maturity to sales enablement's potential for business impact.

❖ **Maturity:** Early adopters of sales enablement are seeing increased win rates and quota attainment. Many of these organizations that implemented sales enablement two or more years ago did so with fewer resources and examples than are available today and figured out their approaches through trial and error. For those in the early stages of implementation or just beginning to explore sales enablement, this means that there are more best practices and lessons learned available to help elevate the effectiveness of your sales enablement efforts. This also means that there is no time to waste in debating whether or not to implement; the earlier you adopt sales enablement, the sooner you will see positive business impact.

❖ **Formalization:** The maturity of a sales enablement function is directly related to formalization, as those with a defined charter for sales enablement achieve better win rates, quota attainment, retention, collaboration, and overall business success. Therefore, when implementing sales enablement, it is essential to put the time and energy into creating a roadmap to success with clear goals and priorities. As you grow and mature, this will help you stay anchored to a vision and strategy.

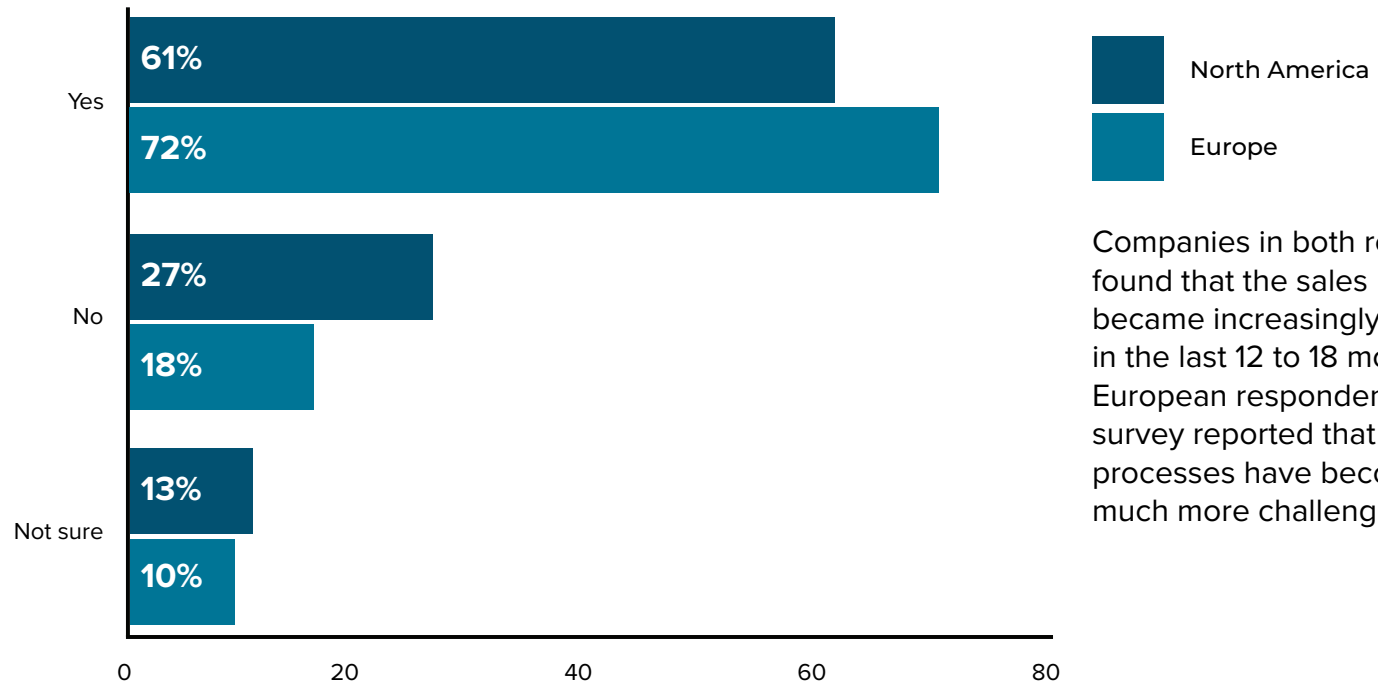
❖ **Commitment:** The more support and resources dedicated to the sales enablement function, the better. Organizations that have dedicated tools and teams focused on sales enablement have better collaboration and retention. When those tools are in place for longer than two years, win rates and quota attainment are also boosted. Commitment from an organization through resources, in the form of people, process, and technology, is necessary for sales enablement to reach its full potential, and is especially important to have as the function matures.

Regional Analysis - Europe



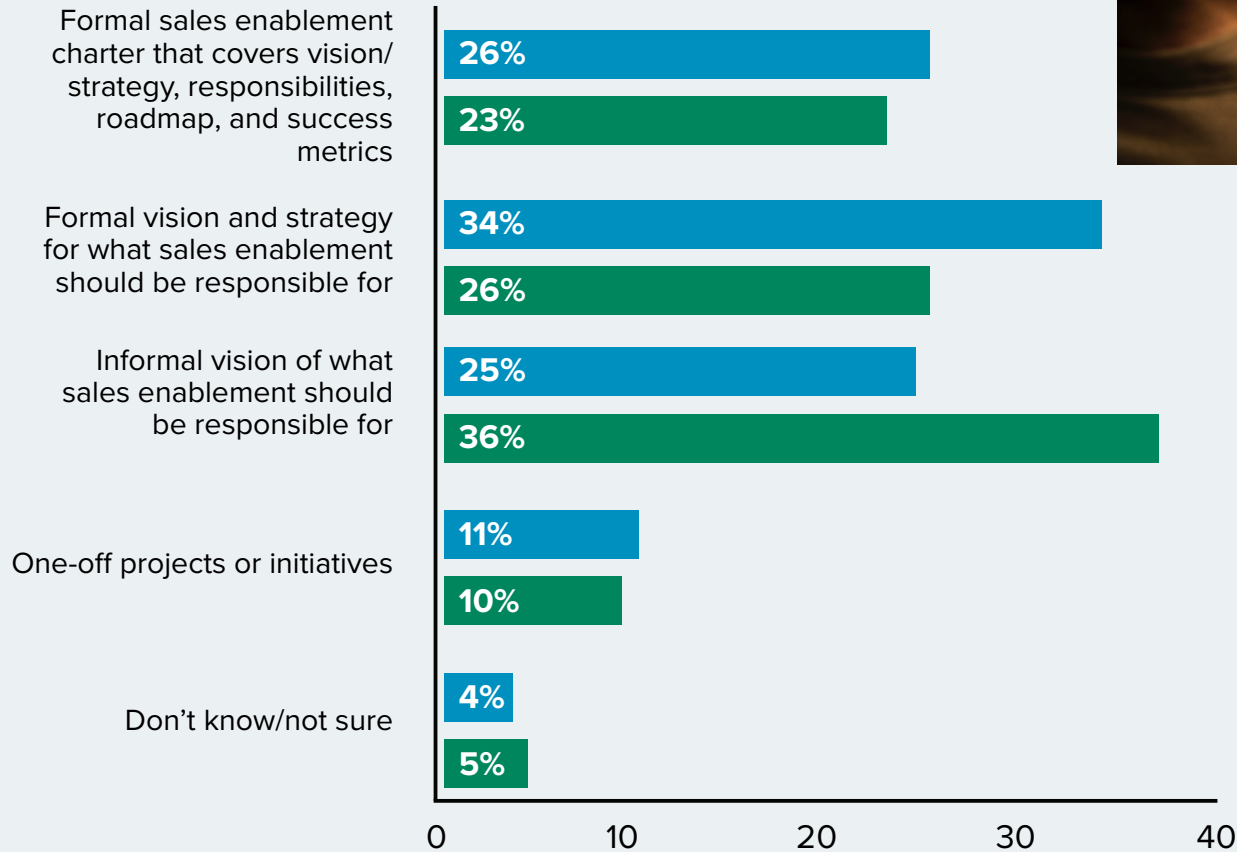
While sales enablement is growing in popularity across the globe, variances exist between regions in their approach and ultimate success when implementing it. We analyzed data from Europe and compared it with the results seen in North America. Outlined in the following section are the key differences observed between the two regions.

Has your company's or team's sales process become more challenging over the last 12-18 months?



Companies in both regions found that the sales process became increasingly difficult in the last 12 to 18 months. European respondents to the survey reported that sales processes have become much more challenging.

Which of the following best describes your company's approach to sales enablement?



Today, European companies are less formal than those in North America in their approach to sales enablement. It is more common for European organizations to have an informal vision of what sales enablement should be responsible for, as is the case for 36% of respondents, than it is to have a formal vision or sales enablement charter in place.

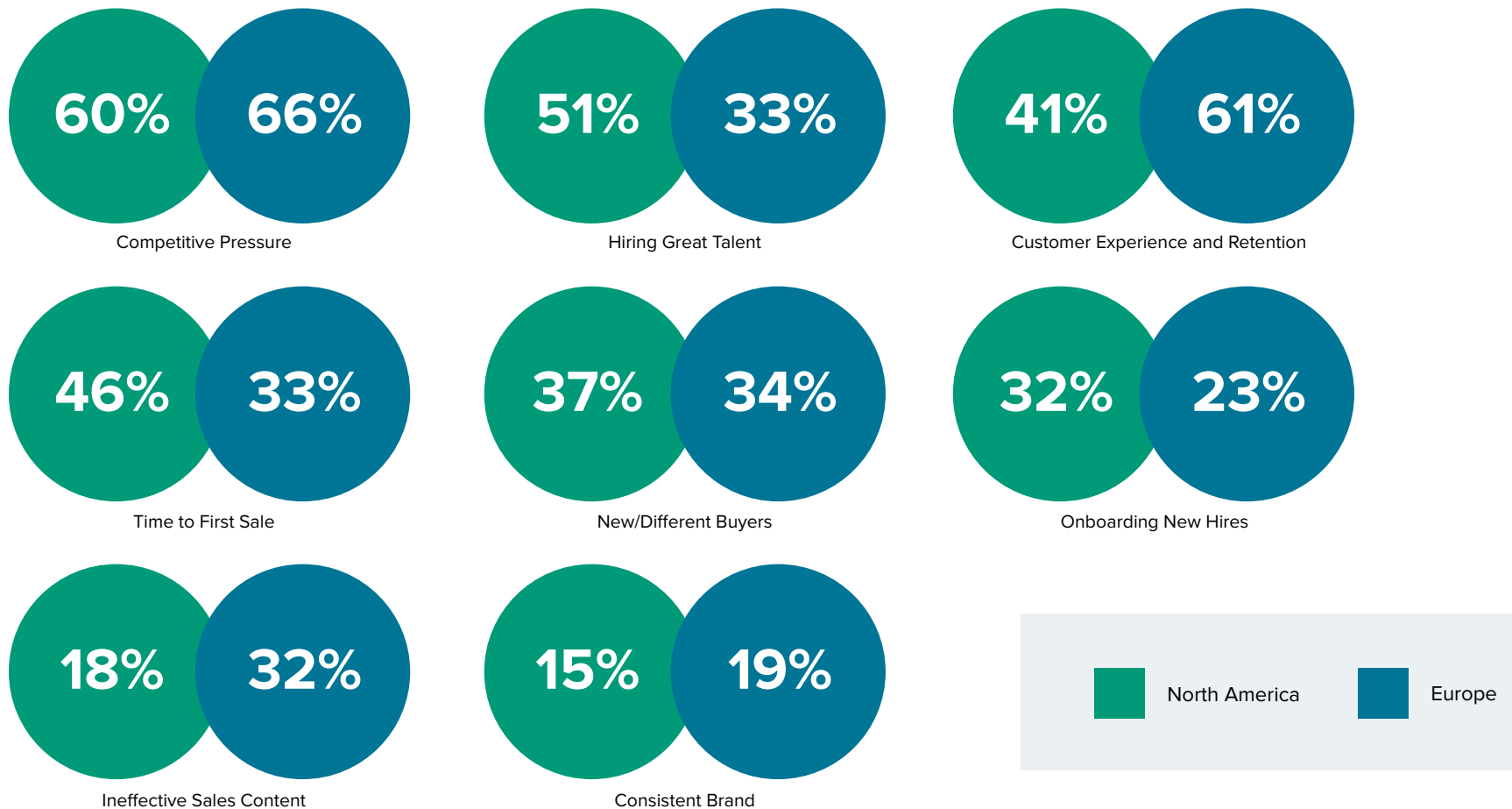
■ North America
 ■ Europe

What are your top three sales challenges?

Digging deeper into sales challenges, while European companies also identify competitive pressure as their number one challenge, customer experience and retention is a top concern for 61% of those surveyed in Europe, an increase of about 20 percentage points from those in North America.

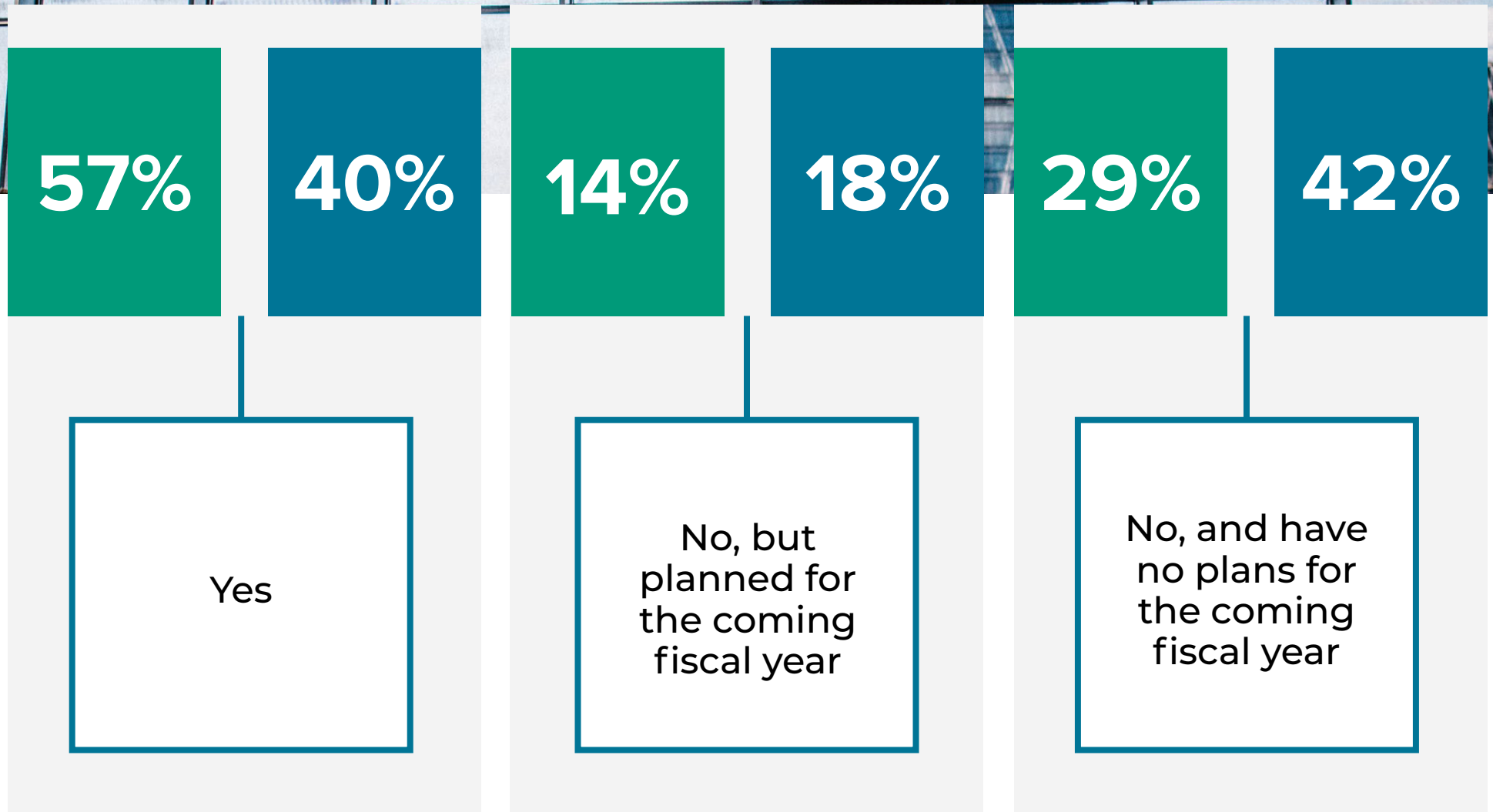
European companies also struggle much more with ineffective sales content. It lands second from the bottom of the list of top concerns for North America at 18%, but is a challenge for 32% of those in Europe.

This data highlights that Europe is much more customer-centric and content-based in its approach to sales.



While over half of companies in North America have a sales enablement person, program, or function, only 40% of companies in Europe do. Meanwhile, 18% of companies in Europe are actively considering adopting enablement, which means we can expect to see sales enablement grow and expand in the region this year.

Does your company have a dedicated sales enablement person, program, or function?



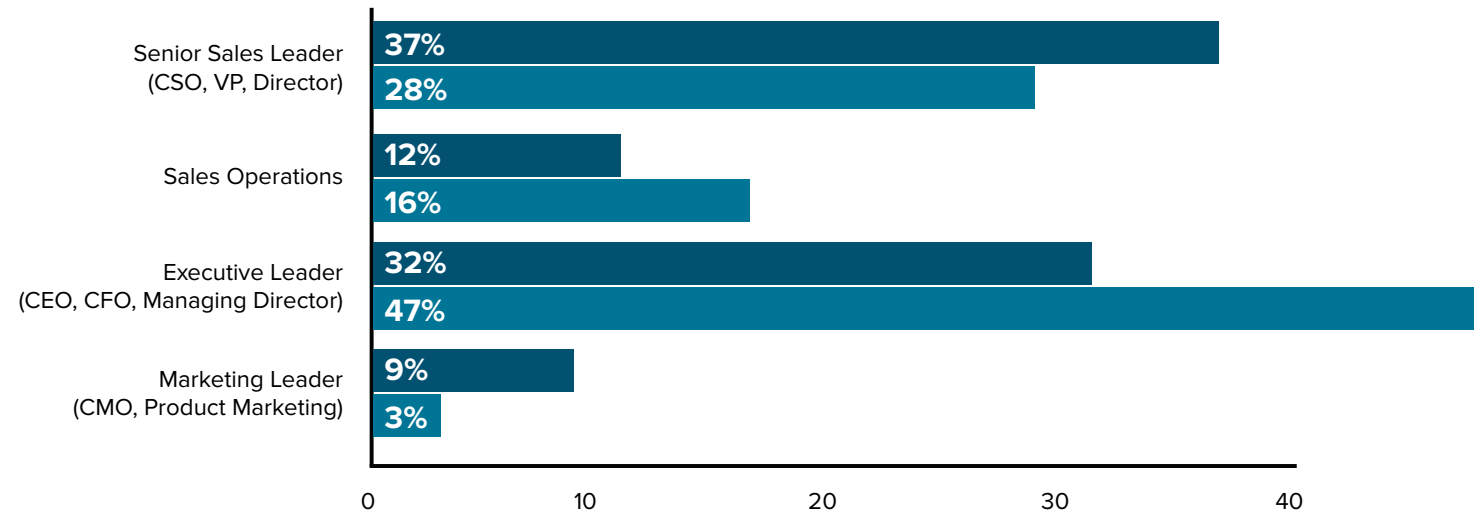
 North America

 Europe



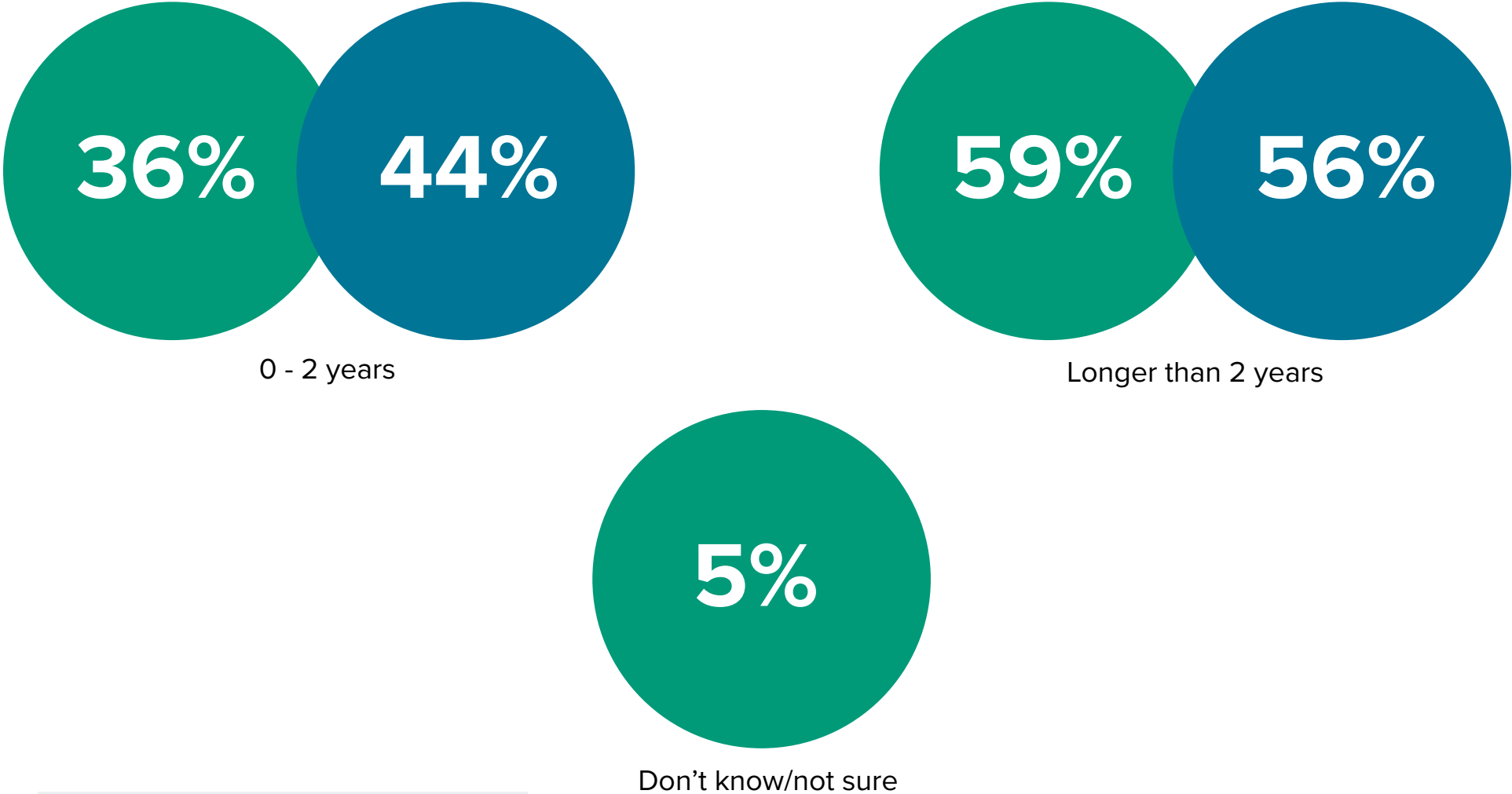
In terms of organizational structure, sales enablement in Europe is much more likely to report directly to an executive leader than any other role or department.

Where does sales enablement directly report to?



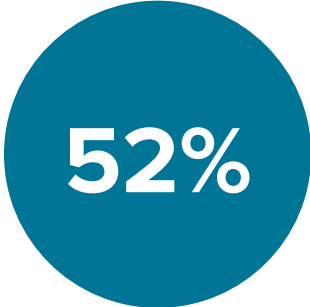
How long has your company had any type of sales enablement process and/or practices?

Europe has seen a surge in the last two years in companies that have adopted sales enablement. This further supports the idea that we will see continued growth of sales enablement in Europe in the near future.

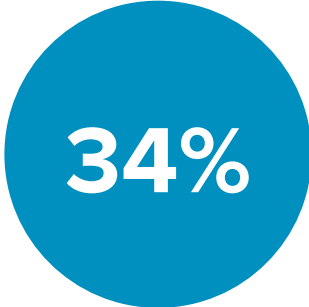


In Europe, companies with a formal sales enablement charter achieve 15% higher win rates than those with an informal approach to sales enablement.

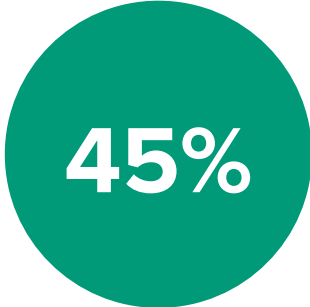
Formal Approaches to Sales Enablement Perform Better



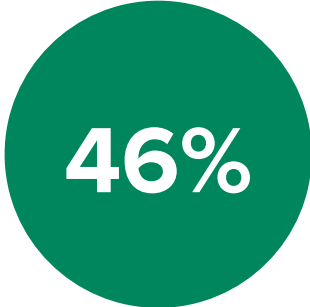
Formal sales enablement charter that covers vision/strategy, responsibilities, roadmap, and success metrics



Formal vision and strategy for what sales enablement should be responsible for



Informal vision of what sales enablement should be responsible for



One-off projects or initiatives



Sales Enablement Maturity Drives Win Rate

Those European organizations that were early to adopt sales enablement processes or practices are showing significant improvement in win rates. Those that have had a sales enablement process or practice in place longer than two years demonstrated win rates that were 10 percentage points higher than those that more recently started their sales enablement efforts.

Win Rate

43%

Less than two
years

53%

Longer than two
years

Sales Enablement Maturity Drives Quota Attainment

Those companies are also more likely to see greater quota attainment the longer they have had a sales enablement process or practice in place. For European companies using a process or practice for longer than two years, they experience 70% quota attainment compared to those with less established practices at 51% quota attainment. However, it is also important to understand that tools must be coupled with a formal charter and dedicated teams to be most impactful, as seen in the greater, global report.

Quota Attainment

51%

Less than two
years

70%

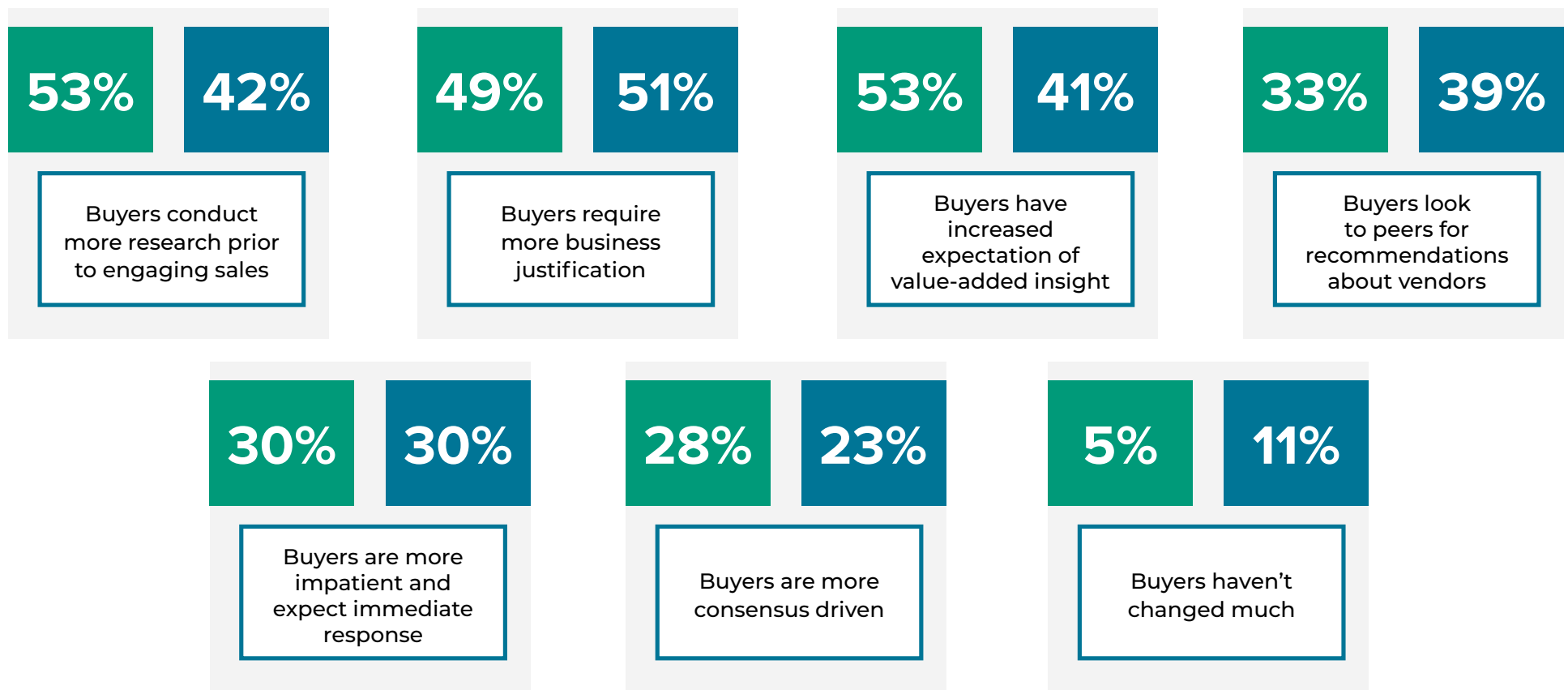
Longer than two
years

Role Analysis: Executive Perspectives

Executive leaders and sales enablement professionals share opinions on the top three ways they think buyers have changed in the last 12 to 18 months. Both roles think buyers conduct more research prior to engaging sales, require more business justification, and have an increased expectation of value-added insight. However, they differ slightly in their ranking of importance among the three.

Conducting more research and expectation of value-added insight tie for the top observations of executive leaders at 53%. Sales enablement, on the other hand, ranks research second at 42% and value-added insight third at 41%. Instead, requiring more business justification is the most common observation among sales enablement professionals at 51%.

How do you think your buyers have changed over the last 12-18 months?

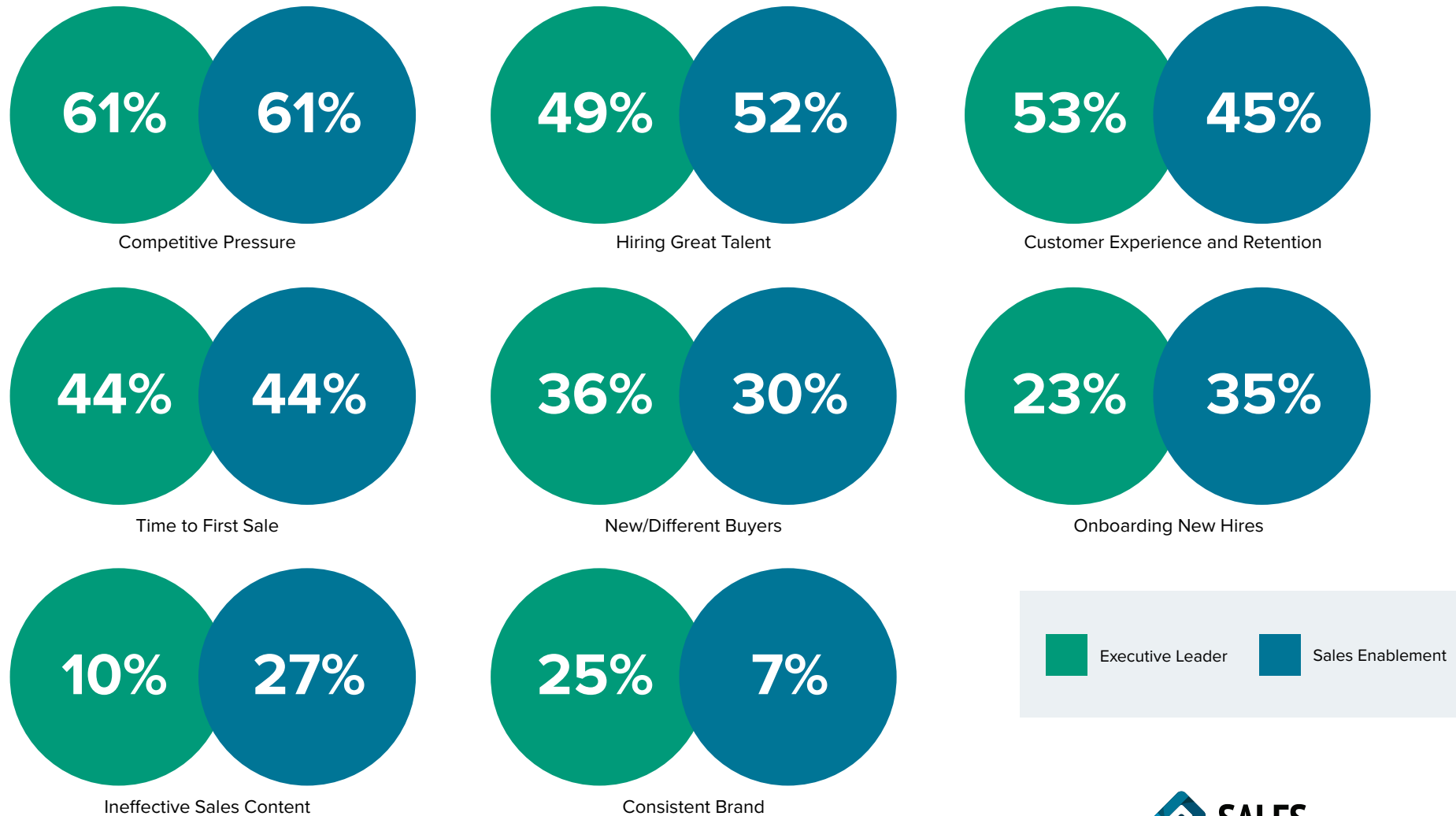


■ Executive Leader
 ■ Sales Enablement

What are your top three sales challenges?

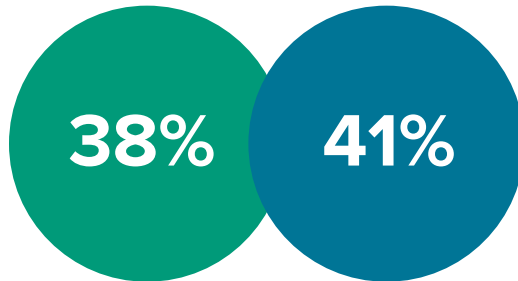
Sales enablement professionals and executive leaders are also aligned on what they perceive to be the top sales challenges, as both had 61% of respondents in that role identify competitive pressure as the biggest issue. But at the same time, sales enablement professionals are much more concerned with content effectiveness and onboarding and less concerned with branding than executives.

Sales enablement professionals were 52% more likely to say their top sales challenges include onboarding new hires; 170% more likely to say ineffective sales content; and 72% less likely to say consistent branding.

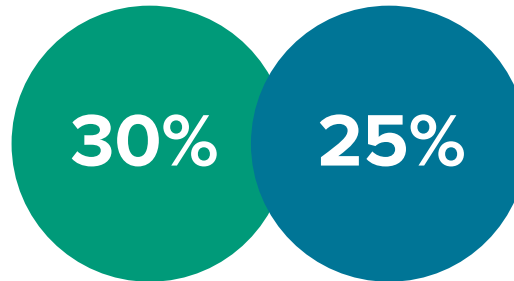


What are the top goals for sales enablement at your organization?

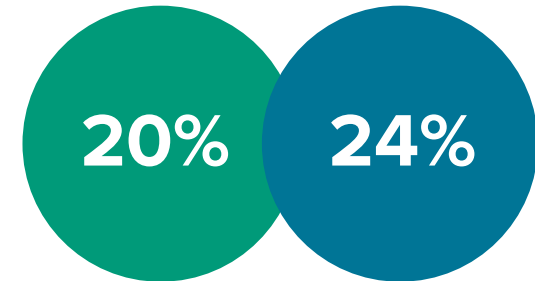
While executive leaders and sales enablement professionals both think increasing sales deal win rates is the top goal for sales enablement, sales enablement professionals are significantly more concerned with decreasing new sales rep ramp and time to first deal than executive leaders. In fact, it is the least common goal for executive leaders to have for enablement, accounting for just 3% of respondents. Meanwhile, nearly a quarter (24%) of sales enablement professionals surveyed rated it as a top responsibility for enablement.



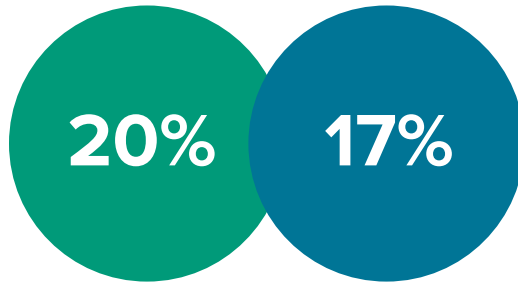
Increase sales deal win rates



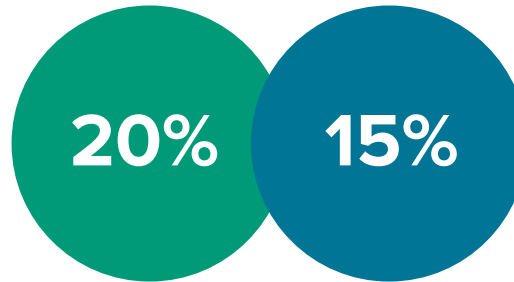
Optimizing revenue



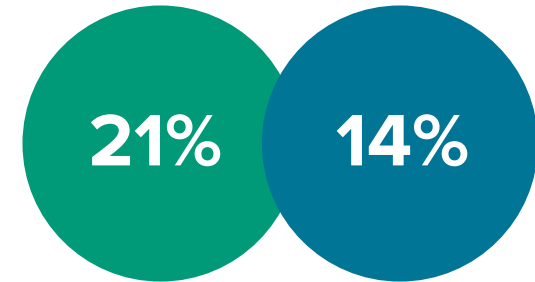
Increase new customer acquisition



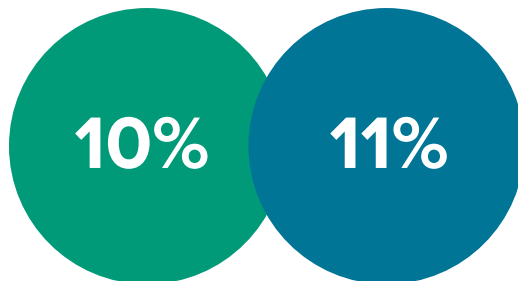
Reduce sales cycle length



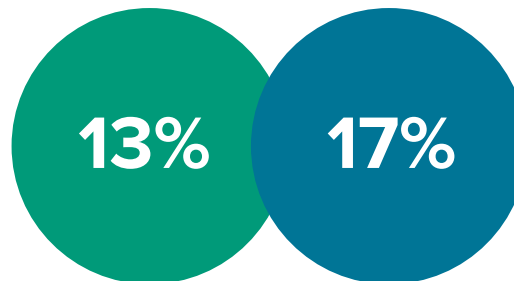
Improve customer experience



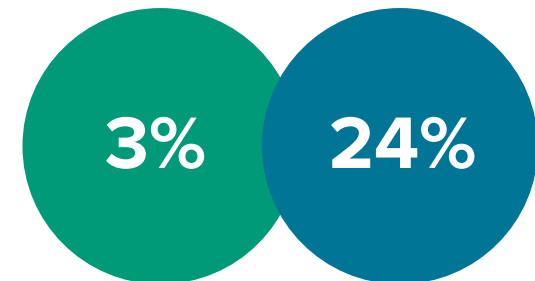
Increase average deal size



Broaden existing customer penetration



Increase available selling time



Decrease new sales rep ramp and time to first deal



Executive Leader



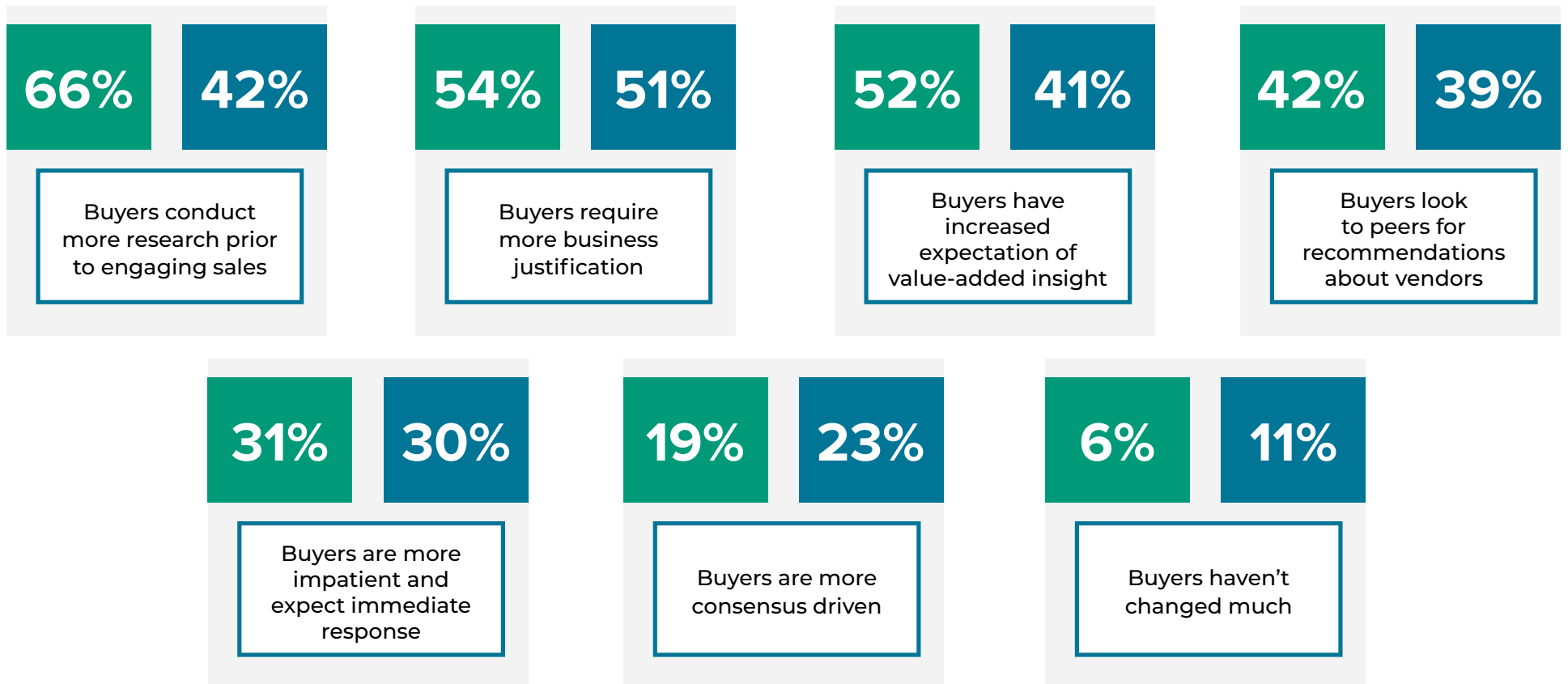
Sales Enablement





Role Analysis: Marketing Leader Perspectives

How do you think your buyers have changed over the last 12-18 months?

Marketing leaders and sales enablement professionals are very different in their perception of how buyers have changed in the last 12 to 18 months. 66% of marketing leaders think buyers conduct more research prior to engaging sales, which is an increase of 57% compared to sales enablement professionals.

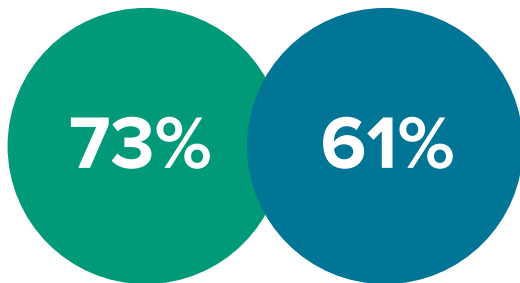


 Marketing Leader

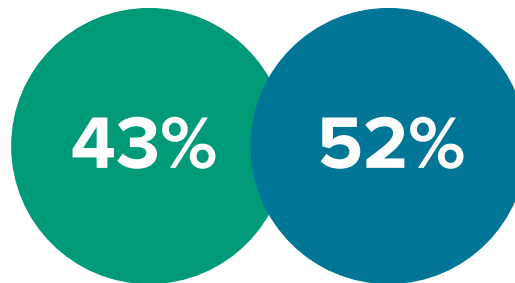
 Sales Enablement

What are your top three sales challenges?

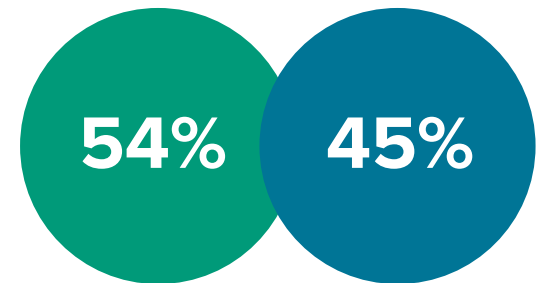
Both marketing leaders and sales enablement professionals view competitive pressure as the top sales challenge facing their organizations. However, there are major differences between the level of importance of the other challenges for each persona. The largest gap is in the perception of ineffective sales content, where sales enablement professionals are 108% more likely to view it as a top sales challenge than marketing leaders.



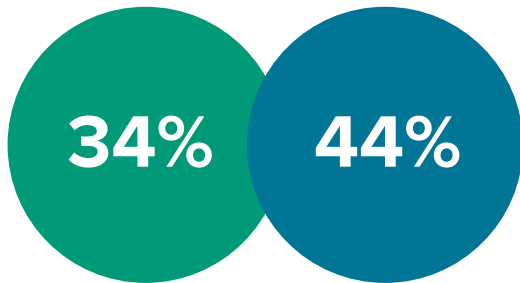
Competitive Pressure



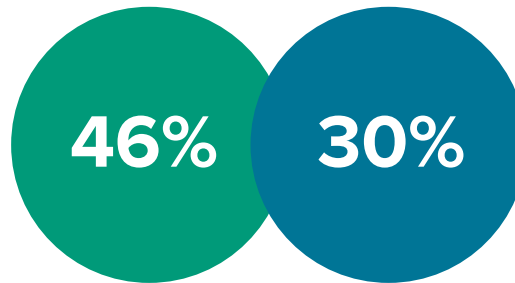
Hiring Great Talent



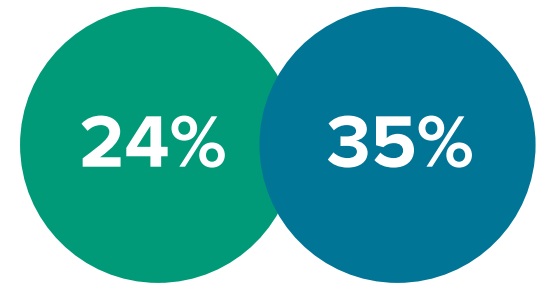
Customer Experience and Retention



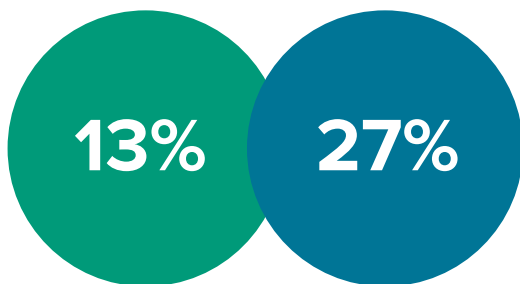
Time to First Sale



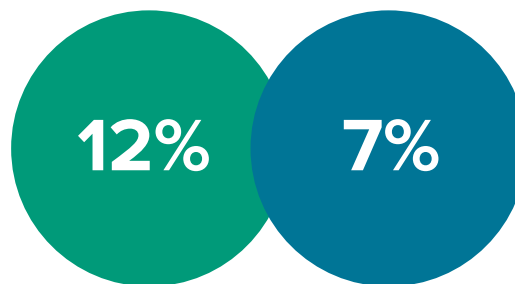
New/Different Buyers



Onboarding New Hires



Ineffective Sales Content

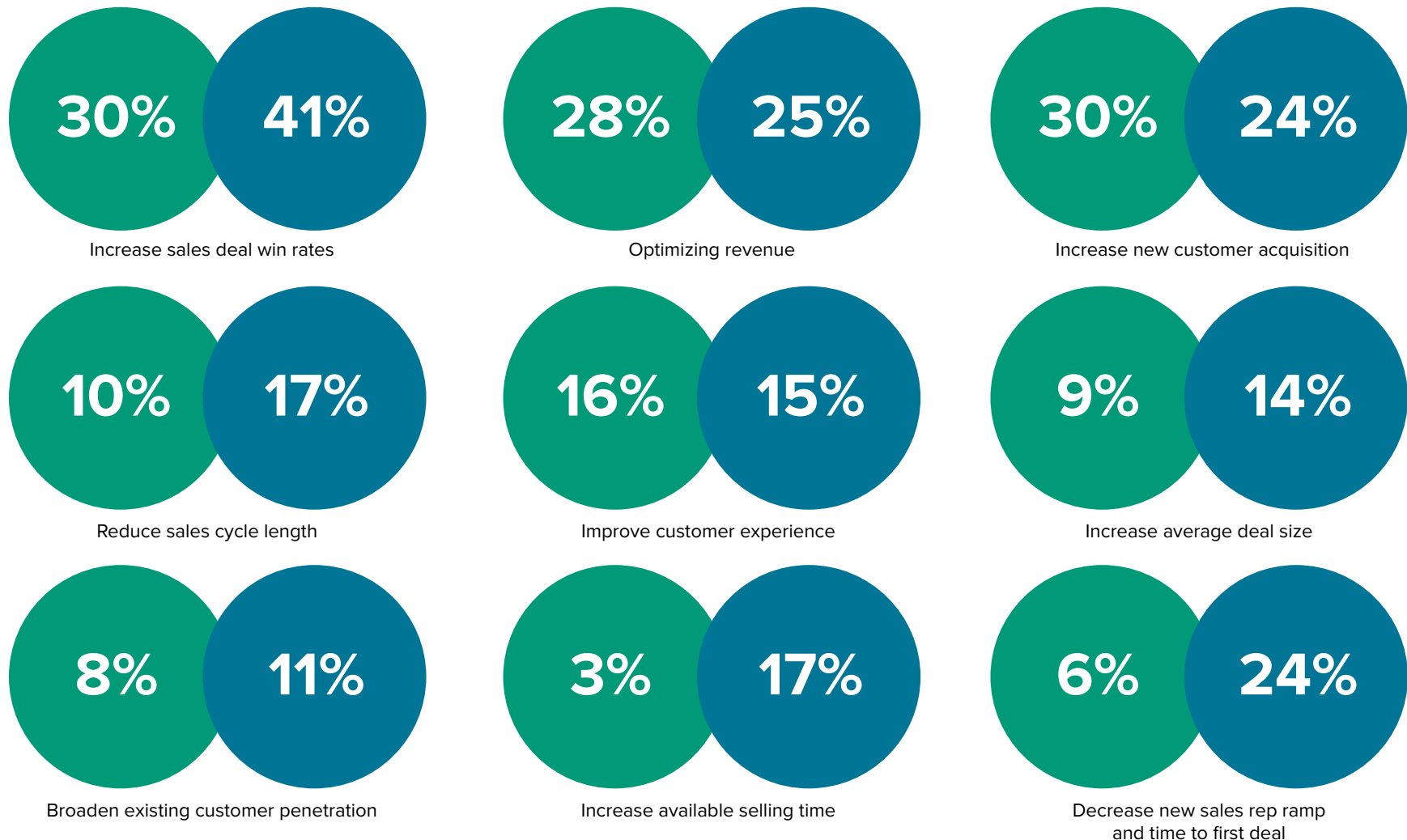


Consistent Brand



What are the top goals for sales enablement at your organization?

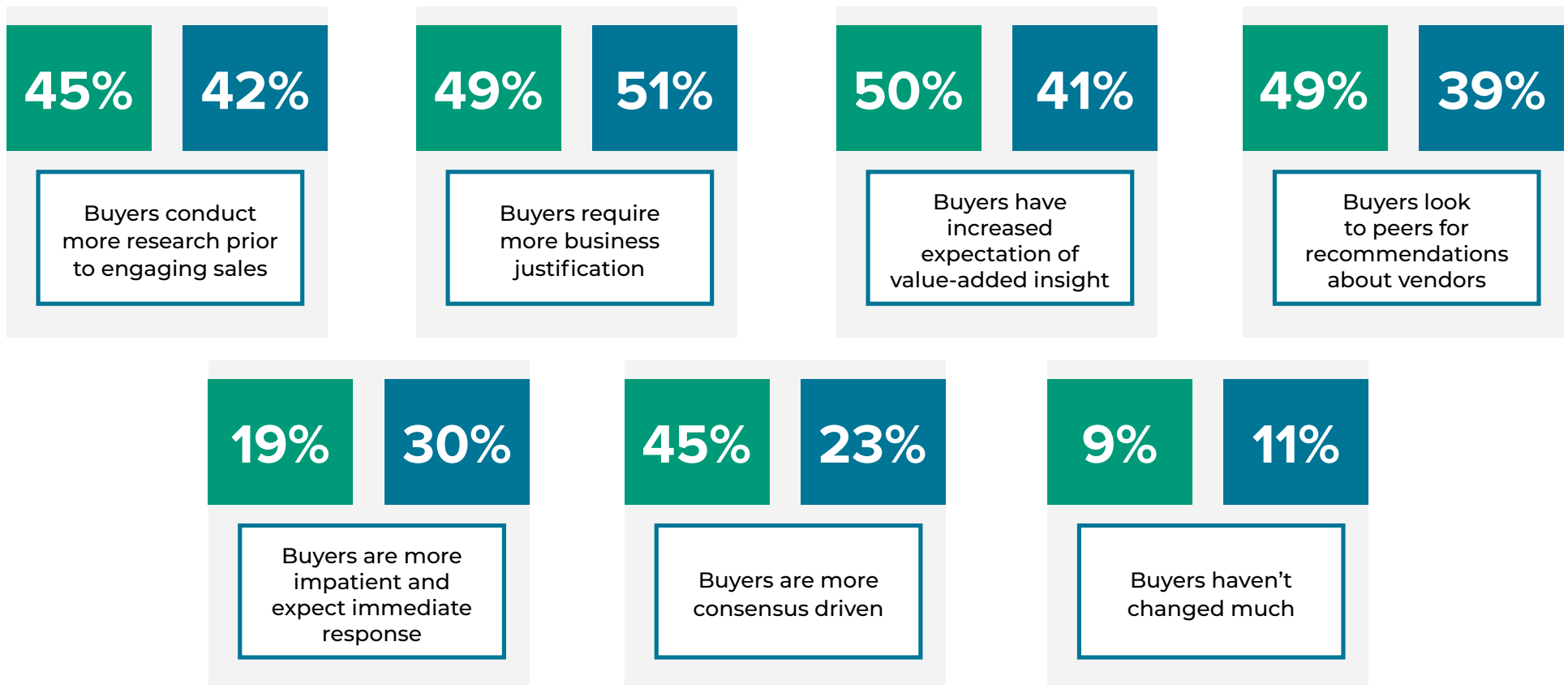
Marketing leaders and sales enablement professionals both think that increasing sales deal win rates, optimizing revenue, and increasing new customer acquisition are the top goals for sales enablement at their organization. For sales enablement professionals though, decreasing ramp time and time to first deal for new sales reps is equally important to increasing new customer acquisition. Marketing leaders are far less concerned with decreasing ramp time and time to first deal, as just 6% identified it as a top goal, a difference of about 300% compared to sales enablement professionals. To bridge the gap in the prioritization of decreasing ramp time and time to first deal, sales enablement professionals need to seek alignment with marketing stakeholders on goals.



Role Analysis: Sales Leader Perspectives

How do you think your buyers have changed over the last 12-18 months?

Sales leaders are 96% more likely to think that buyers have become more consensus driven in the last 12 to 18 months than sales enablement professionals. At the same time, they are more likely to think that there are a number of ways in which buyers are changing, as five out of seven factors are identified as leading causes of change for 45% or more of the sales leaders surveyed.

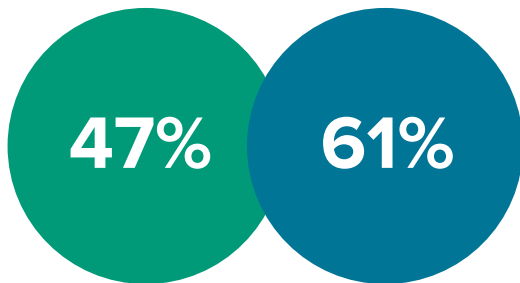


 Sales Leader

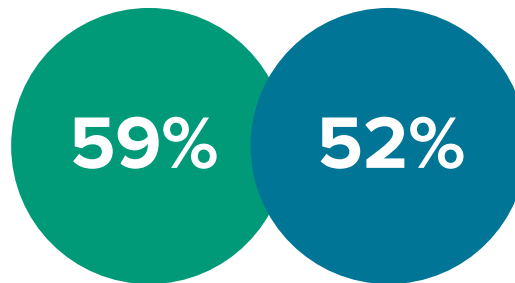
 Sales Enablement

What are your top three sales challenges?

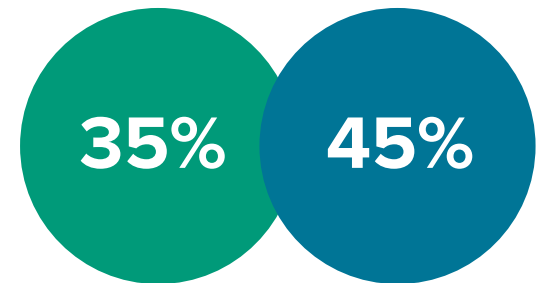
Sales leaders believe that hiring great talent is the greatest challenge they face while it is ranked as the second biggest concern among sales enablement professionals by a difference of about 13%. Meanwhile, sales enablement professionals believe the top challenge sales faces is competitive pressure. However, sales leaders are 30% less likely to think competitive pressure is a top challenge. This demonstrates that they have more confidence in their ability to beat the competition, but less confidence in their new reps and their potential to succeed.



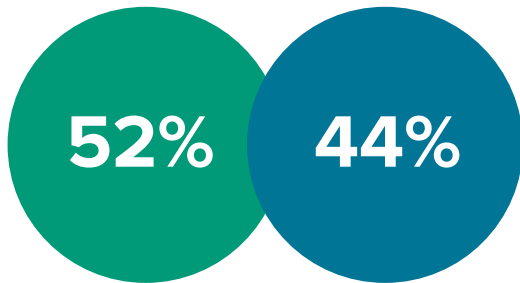
Competitive Pressure



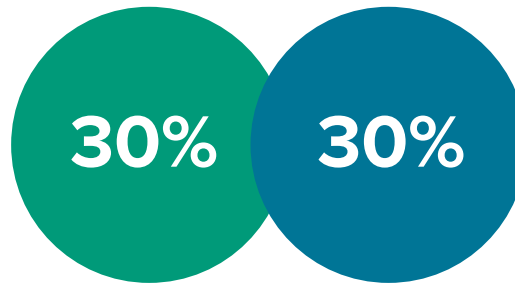
Hiring Great Talent



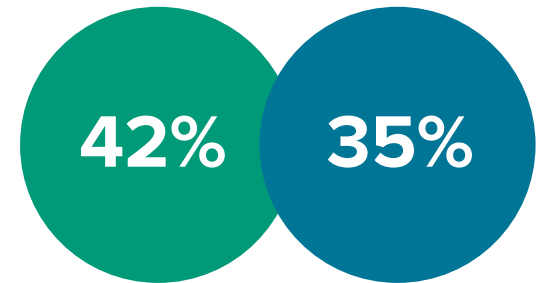
Customer Experience and Retention



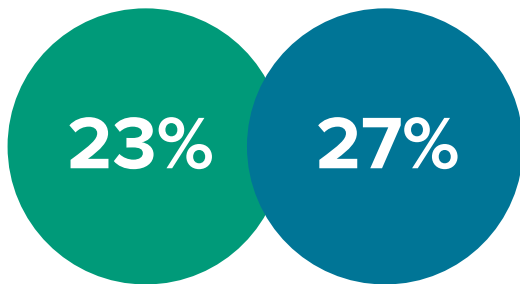
Time to First Sale



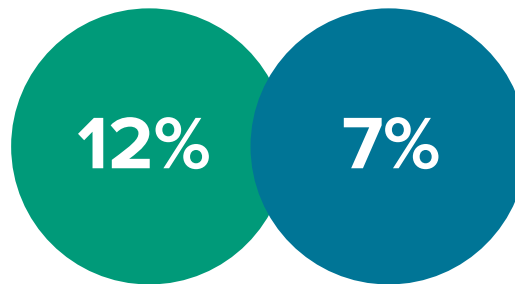
New/Different Buyers



Onboarding New Hires



Ineffective Sales Content



Consistent Brand

 Sales Leader

 Sales Enablement

What are the top goals for sales enablement at your organization?

Interestingly, sales enablement professionals are also significantly more concerned with decreasing new sales rep ramp and time to first deal than sales leaders are. Just 4% of sales leaders list it as a top goal for sales enablement, a difference of 500% compared to sales enablement professionals.

Meanwhile, it should come as no surprise that sales leaders are revenue-focused in their goals for sales enablement, with increasing sales deal win rates, optimizing revenue, and reducing sales cycle length ranking as the most popular goals. While sales enablement professionals also rate these as highly important, the differences in key areas such as onboarding demonstrates the need for sales enablement professionals to align with sales leadership on goals for enablement to maximize impact.



Sales Leader



Sales Enablement

