

Sales enablement project assessment template

Before your team undertakes any sales enablement project, it *needs* to have a project plan.

A project plan identifies and sets expectations, helps maintain clarity and focus, and ensures that everyone involved in the project knows what's part of the plan and what isn't.

Ultimately, a project plan or assessment is a critical piece of your project – when you have one in place, communicating your expectations and objectives is much easier.

Below, you'll find the key factors for consideration as you assess and plan your sales enablement projects. Use it as a checklist to make sure you've factored in everything that needs consideration.

Problem/opportunity statement

To start, provide a meaningful and succinct description of the project you're undertaking.

For example: **"Increase our MQL to SQL conversion rates from X% to X%",** or **"Improve the sales team's discovery of true pain points."**

This provides as much clarity as possible as you start moving the project forward, and acts as a point of reference to look back on throughout. Ask yourself: "Is what we're doing bringing us closer to achieving our problem/opportunity statement?"

Current quantitative metrics that may be impacted and expectations from implementing the project

(Attach reports/report parameters)

Note everything that's measurable including metrics that may end up being impacted by the implementation of the project - this may include quantities, dollar amounts, dates, and timelines.

This gets you thinking about the reach your project will have, as well as preventing any nasty surprises later down the line. The last thing you want is to end up negatively affecting a measurable you never even thought about!

Remember to include any factors that may be **directly or indirectly** impacted.

Current qualitative metrics that may be impacted and expectations from implementing the project

(Attach surveys or other documentation)

While the previous step focused on measurable, quantitative data, you should also include anecdotal improvement expectations for the project.

You might not have a specific field or measurement that can easily be examined but these are still worth noting. In order to use *some* sort of measurement, you could use a survey with a scoring methodology (a 5- or 10-point scale).

Otherwise, think about how you can estimate to identify pre-project and post-project impact. Ask things like: "How much time per day/week do you currently spend doing X?".

Solution to be implemented

Highlight, in as much detail as possible, the solution that you're going to implement to solve your problem/take advantage of your opportunity.

Everything here should make sense when viewed in the context of your original problem/opportunity statement.

Provide details regarding changes to tools in the tech stack, processes, additional training, and anything else which will tangibly change as a result of this implementation and the management of the implementation.

Changes/additions to the tech stack

Due to its importance, this section is to emphasize that you need to provide supreme clarity concerning any changes in the tech stack that might occur due to this project.

Sales teams get very comfortable with their tools due to the familiarity factor, so if you're making any changes in this regard, you have to be crystal clear and note every detail. Do this in conjunction with, or with help from your technology admin or programmer if possible.

Key things to include are: what tool/s are changing, how the field changes as a result, any resulting workflow changes, new definitions, additional operations, and so on.

Test the plan, make adjustments and decisions

Think about whether testing is required. If it is, consider how it will be done, when, and what decisions you're prepared to make before going live.

Here's an example of what your notes could look like for this section:

Test start date: 7/1/23

Test end date: 7/31/23

Participants: Sales team members that will provide feedback, sales leadership, cross-functional department assignees

Test plan and success criteria: Identify what testing will be required for approval and what results are expected

Findings: Document initial measurable findings and anecdotal feedback from participants

Launch information: When testing has been approved, identify launch date

Go-Live plan

Prior to your Go-Live date, you'll need a few things to ensure a smooth roll-out of your project:

A communication plan - what content needs to be communicated, how it will be communicated, and when?

Training - if it's required, how and when will training be provided? Will you provide follow-up training? How will you monitor the progress of the training?

A feedback/communication channel - prior to launch, identify a champion or group that you can make available for immediate feedback and questions during launch.

Success assessment schedule

Here's what your schedule could look like:

- **Weekly for the first 4 weeks:** Look at the impact week-to-week and whether it's per your expectations, examine the feedback you've received, and answer any questions that have arisen.
 - **End of Q1:** Again, compare the impact to your expectations and the weekly figures, while still looking at the feedback and questions as well.
 - **End of Q2:** As with Q1, look at the same factors, it's important to be consistent. What you examine should be predetermined, as it's much harder to analyze on a whim.
 - **End of Y1:** After one year, you should be able to have quite a good bird's eye view of the project and in which direction you should go from there. Remember to stay consistent and compare "apples to apples" rather than "apples to oranges" with your metrics.
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Results: quantitative metrics affected by the project

(Attach reports and report parameters)

Once you've got a success assessment schedule, and your project has been rolled out, it won't be long before it's time to start measuring the results.

As we discussed earlier, all these criteria for success and failure, and the metrics they're tied to, should all have been decided prior to launch.

That means that here you're not trying to figure out what to measure in order to determine the project's success. You already know which figures, you just need to analyze the changes (or lack thereof).

Run your reports on the various measurables you identified at the start of the project: quantities, dollar amounts, dates, timelines, etc. Don't forget to include any additional factors identified during the project that were directly or indirectly impacted.

Results - qualitative measurements affected by the project

As with before, don't just consider your quantitative data. Take your anecdotal research, your surveys, and estimates and use those to measure the impact of the project in that respect.

Notes / Learning / Next Actions

Lastly, remember to document the process and take notes on your learnings - with every project comes useful lessons you can bring into subsequent enablement efforts.

Likewise, be sure to map out your next actions for the current project as well - don't just abandon it.

P.S. We've got a whole course on perfecting your [core sales enablement skills](#). Why not check it out?