Enablement Portfolio Example
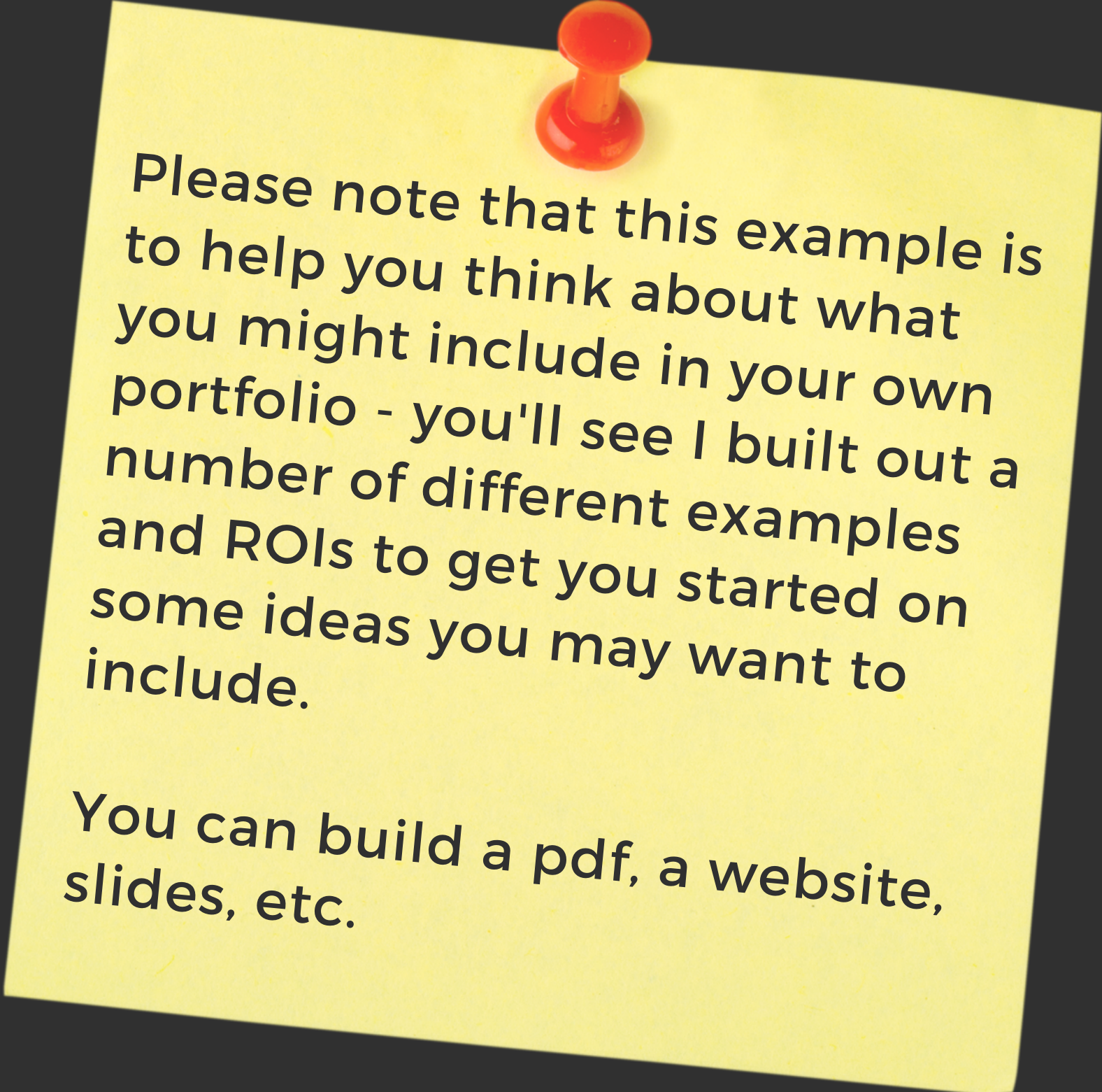
Here is a suggested structure:

Who you are

Sample projects

- the problem you addressed
- your process and result
- what you learned or would have done differently

Example docs and guides

Please note that this example is to help you think about what you might include in your own portfolio - you'll see I built out a number of different examples and ROIs to get you started on some ideas you may want to include.

You can build a pdf, a website, slides, etc.

Your Name

Enablement Portfolio

Location

2023

EVERYTHING YOU NEED TO KNOW YOU HAVE LEARNED THROUGH YOUR JOURNEY.

- THE ALCHEMIST

>> Think about a quote you can tell a story about that helps you better position yourself. This quote connects to me because my story is about how I like to fail forward and fail fast, and that practice and application are a part of my charter <<

SAMPLE PROJECTS 2022 - COLLABORATION

Projects	Process & Outcome	My Key Learnings
• Sales Onboarding • Leadership Onboarding • Tech Resource Onboarding	• Created an onboarding curriculum based on sales leader goals. Onboarded X# people so far in 2023.	• Give guidance to newer leaders on their role with developing their new hires • Pair data and observation to track ramp rate
• Build and Execute on Company-Wide Strategic Sales Campaign, specific to Cloud Opportunities	• Aligned with sales stakeholders to understand sales goals and which skills need to be leveled up to achieve those sales goals • Sales KPIs for cloud pipeline increased due to sales performance.	• Practice and peer storytelling were key in building confidence • Bi-Weekly connects with sales leadership to track progress towards skill gaps specific to this campaign
• Created a new, effective process for content management and micro-learning	• Surveyed leaders to understand how they search for training content, enablement one-pagers, videos, and playbooks	• Build new processes with leaders to ensure buy-in and adoption

SAMPLE PROJECTS 2022 - PROGRAM DESIGN

Projects	Process & Outcome	My Key Learnings

Create a Program and Curriculum to Address a Sales Gap:
○ Lack of Net New Buying Accounts
	• Prospecting Series that consisted of:
	  ○ Live peer interviews / Q&A
	  ○ Weekly Reasons to Call
	  ○ New Customer Onboarding Methodology
	  ○ Meeting Prep Guide for Intro Calls
	• X# Enterprise AEs earned X# of New Buying Accounts in <90 days
		• Train leaders first so they can reinforce the content, the training, and troubleshoot questions so Enablement scales
		
		• Use data to identify additional ad-hoc training needs tailored to a subset of reps - struggling vs. high-execution reps

Create a Program and Curriculum to Address a Sales Gap: ○ Forecast Accuracy	• Focused on the behaviors needed to properly qualify a deal, which influenced the average (X% variable forecast vs. previous X%)	• Shifted the perspective of why the finance conversation is important and how to talk about it

SAMPLE PROJECTS 2022 - PRODUCT ENABLEMENT

Projects

- **Internal Certification for:**
  - name of product or tech
  - name of product or tech
  - name of product or tech
  - etc.

Process & Outcome

With Leadership:
- Align on sales goals
- Align on Development Components
- Align on Execute Components
- Identify desired KPIs to show ROI

Input from Leadership:
- Organize and build content
- Build knowledge checks and create role-play rubrics
- Build an e-learning AI component
- Plan schedule of live training vs. virtual vs. e-learning modules

My Key Learnings

- Leaders need to be certified as well
- Gamify the certification to drive competition and engagement from sales teams
- Work with Sales Leadership for incentives
- Celebrate milestones achieved along the way
- Need yearly true-up for all sales reps and leaders

SAMPLE PROJECTS 2022 - COACHING

Projects	Process & Outcome	My Key Learnings
• Coaching and Development Program for both Leaders and Enablement Coaches	• Standard but Flexible Coaching Methodology to Increase Rep Potential and Performance • Bi-Weekly Coaching Workshop to further develop soft skills	• Feedback should not solely be performance-based • How to better craft consistent, clear communication to VP Stakeholders • Not everyone can coach
• Office District Visits and Workshops	• Traveled to X# of field office • Shadowed and observed AEs and leaders, gave feedback and on-the-spot micro-coaching	• Collaboration and alignment with regional VPs were integral to workshop buy-in
• Investment in my own development. ○ Emergenetics, Sandler, and Maxwell Leadership Certified	• Leverage my certifications to build connection, understand motivations, and coach others effectively and efficiently	• Repetition is key • Building connections is not natural for everyone so these individuals need more hands-on practice

EXAMPLE - FIELD ONBOARDING SCORECARD

Stack Rank for Onboarding - Purpose of this is to gauge the overall potential of a new hire - balancing coachability, competency, and retention of knowledge.

Scorecards for New Hires:

- Gives Managers a snapshot of their rep's potential
- Identifies rep 's areas of improvement
- Can reflect program changes

AE	DSM	Onboarding Participation	Attitude	Effort	AE Competence	Points %	Averaged Test Score	Total Average
		4	4	4	4	100%	100%	100%
		4	4	4	4	100%	100%	100%
		4	4	4	4	100%	99%	99%
		4	4	4	4	100%	98%	99%
		4	4	4	4	100%	96%	98%
		4	4	4	4	100%	96%	98%
		4	4	4	4	100%	96%	98%
		4	4	4	4	100%	96%	98%
		4	4	4	4	100%	95%	98%
		4	4	4	4	100%	89%	94%
		4	4	4	4	100%	86%	93%
		3	4	3	4	88%	99%	93%
		3	4	4	4	94%	91%	93%
		3	3	4	4	88%	96%	92%
		3	3	3	4	81%	98%	89%
		3	4	4	3	88%	90%	89%
		3	3	3	4	81%	96%	89%

AVERAGE PERFORMANCE
92%

AVERAGE TEST SCORES
94%

AVERAGE OVERALL
93%

EXAMPLE - SELLER ONBOARDING DASHBOARD

Purpose is to measure avg. amount of *Time to Achieve* certain leading / lagging indicators. This helps Enablement to understand "What Good Looks Like" and compare class over class.

Field onboarding dashboard

- Enablement can understand how quickly a New Hire is identifying and closing opportunities compared to the data-set average.

	AVG Days to Close	AVG Days to Identify	AVG Days to Identify	AVG Days to Identify
	$50k Revenue	First $10k-25k Revenue Opp	First $25k-50k Revenue Opp	First $50k+ Revenue Opp
AE Name	**AVG Days to Close $50k Opp** ▲	**First $10k-25k Opp**	**First $25-50k Opp**	**First $50k+ Opp**
	40 ▲	6 ▲	23 ▲	2 ▲
	45 ▲	16 ▲	8 ▲	36 ▼
	54 ▲	22 ▼	23 ▲	7 ▲
	55 ▲	6 ▲	10 ▲	34 ▼
	56 ▲	4 ▲	21 ▲	7 ▲
	56 ▲	0 ▲	2 ▲	1 ▲
	62 ▲	29 ▼	2 ▲	2 ▲
	63 ▲	36 ▼	18 ▲	
	64 ▲	24 ▼	35 ▼	8 ▲
	65 ▲	0 ▲	8 ▲	1 ▲

DATA EXAMPLE - WORKSHOP SURVEY

Self Assessment of New Hire class <6 months in the role.
Purpose is to measure confidence after completing a series of workshops.

Confidence leads to:

- A fail-forward attitude
- Not being afraid to try
- Self-awareness
- Stronger customer relationships
- Improved communication
- Better feedback
- Resourcefulness
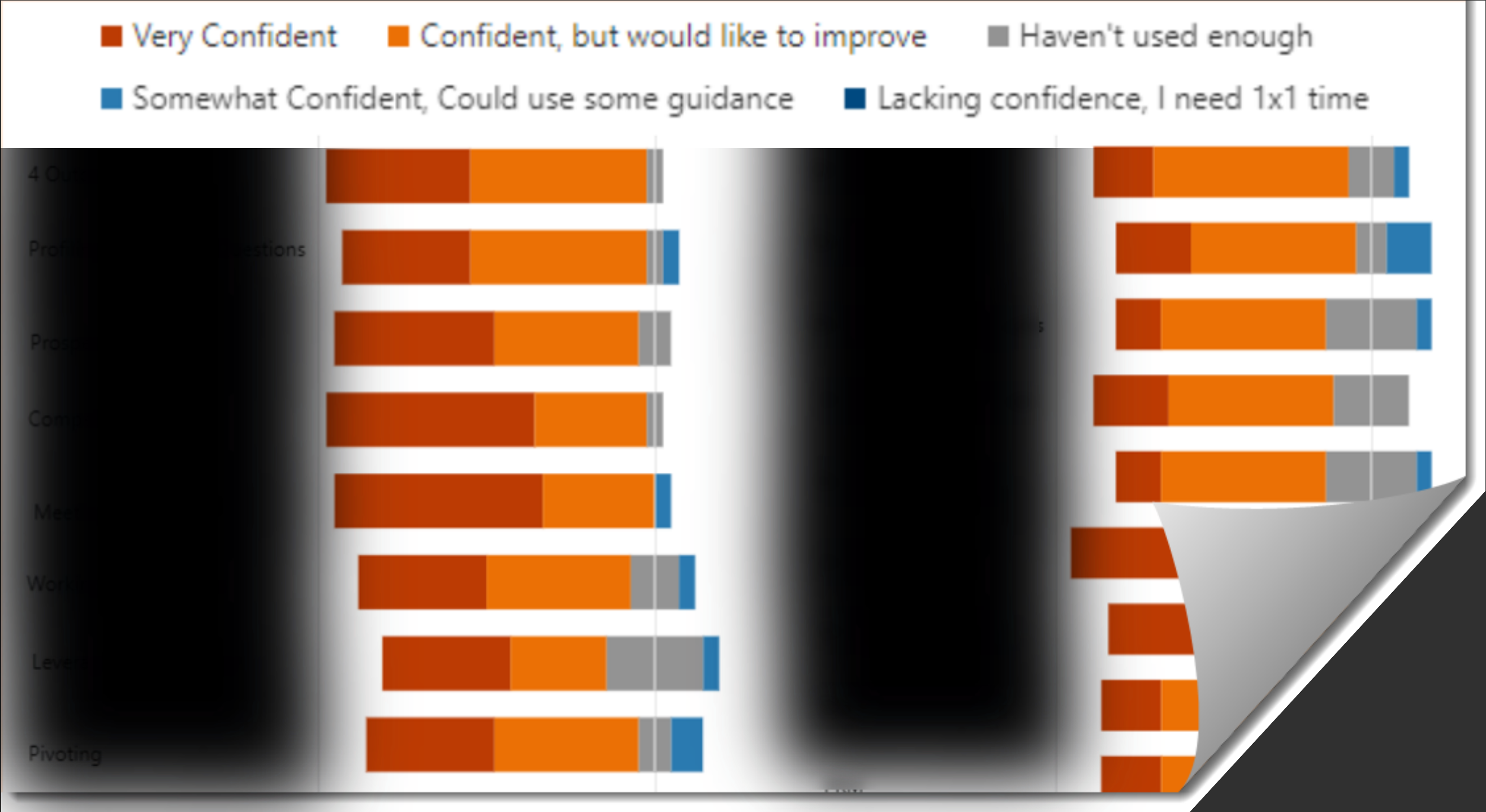
LEADERSHIP GUIDE EXAMPLE

Alignment with leadership is integral - this guide was created to give leaders guidance on how to prep for and ramp their new hires alongside Enablement.

Stakeholder Alignment:

- Builds trusts
- Ensures desired outcome is achievable
- Invites participation
- Shows mutual commitment to the strategy
- Empowers Enablement

YOUR NAME 2023

CONTINUED DEVELOPMENT OF YOUR NEW HIRES

BE A RESOURCE

ENCOURAGE SUCCESS

ASSESS PROGRESS

FOSTER GROWTH

TABLE OF CONTENTS

Inside Onboarding Program

Manager Pre-Boarding Checklist

Manager Day-One Checklist

Manager Two Week Checklist

90 DAY PLAN

30 DAYS

Build Relationships with Leadership Stakeholders

Organizational Discovery: Understand Primary Goals and Functions of BUs

Create Operating Rhythm

Assess Current Enablement Function

Attend NYC Sales Team Meetings

YOUR NAME 2023

45 DAYS

Assess Current Enablement Function

Understand Value Prop and Sales KPIs

Audit Onboarding Program

Interview Top Sales Performers

Understand What Good Looks Like

Observation & Coaching

60 DAYS

Perform Skill Gap Assessment

Draft Suggested list of Sales Certifications

Build Short Term and Long Term Ongoing Training Plan

Evaluate Tech Stack - On Demand and Content Mgmt.

Observation & Coaching

90 DAYS

Create Enablement Checkpoints and Performance Milestones for Sales

Define and Share Enablement Charter

Communicate Sales Enablement roadmap and alignment

Observation & Coaching

Thank You!

Your Name

If you have questions, please don't hesitate to contact me.
your email
your phone

Location

2023