October 13, 2010

A SIMPLE Sales Enablement Framework

by Scott Santucci and Bradford J. Holmes
for Technology Sales Enablement Professionals

FORRESTER® Making Leaders Successful Every Day

October 13, 2010

A SIMPLE Sales Enablement Framework

Use A Framework To Simplify A Complex Sales Support Environment

by Scott Santucci and Bradford J. Holmes
with Katherine Shao and Dan Feldman

EXECUTIVE SUMMARY

In most complex businesses today, random and poorly managed sales support resources drive unneeded costs while also contributing to overburdening the sales force. These resources are proliferating as marketing, sales, HR, and other groups make investments to "help sales sell" that are wasteful at best — and that create barriers to achieving business strategy at worst. To streamline these random acts of sales support, Forrester has created a SIMPLE (sales initiatives, marketing practices, and leadership excellence) framework for sales enablement professionals to use in supporting their selling systems more effectively.

TABLE OF CONTENTS

NOTES & RESOURCES

In early 2010, Forrester developed the first draft of our SIMPLE framework and began sharing it with clients. We revised and tightened it and discussed its use in practice during roundtable sessions with our Sales Enablement Leadership Council, which consists of sales and marketing executives from companies such as: Acronis, ADP, Ariba, azeti Networks, BMC Software, Brocade, BT Group, Cable&Wireless, Capgemini, Cisco Systems, CSC, Dimension Data, Gigamon, HP, IBM, Informatica, Logica, Orange Business Services, SAP, Siemens, SunGard, Symantec, T-Systems, Verizon Wireless, and VMware.

Related Research Documents

"Sales Enablement Defined"
August 4, 2010

"Optimize Performance By Driving Enterprise Sales Outcomes"
July 17, 2009

"Uncovering The Hidden Costs Of Sales Support"
April 13, 2009

"Engineering Valuable Sales Conversations"
November 12, 2008

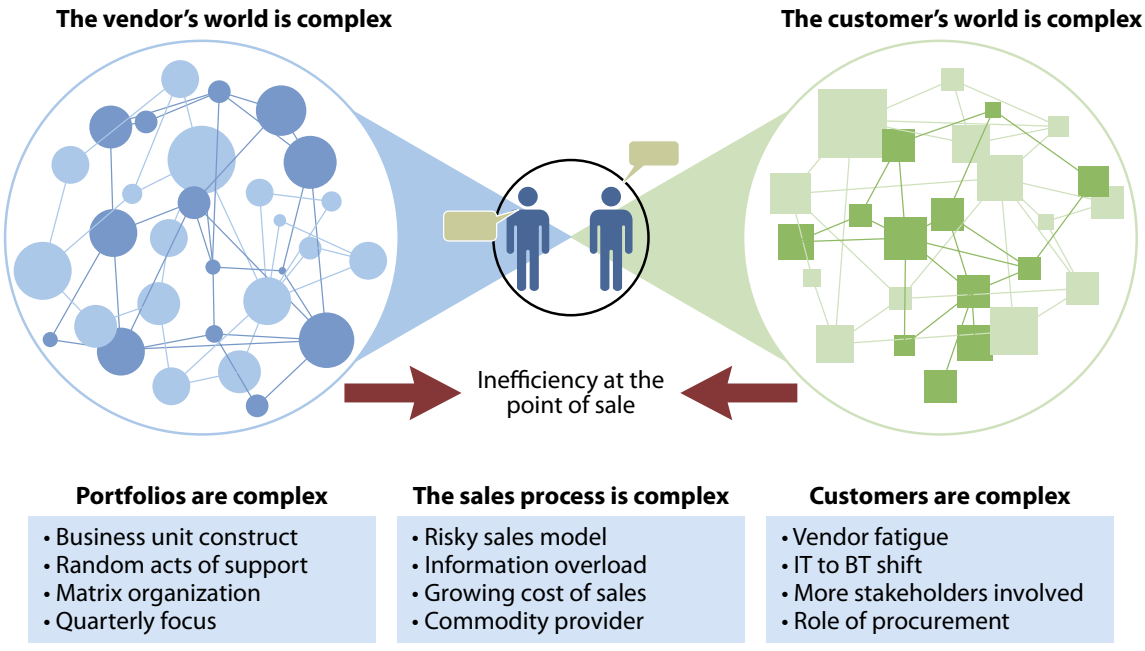
PROBLEM: RANDOM ACTS OF SALES SUPPORT UNDERMINE BUSINESS STRATEGY

Simply stated, the majority of vendors within the technology industry are suffering from a major complexity problem driven by changing market forces and manifesting itself as inefficiencies at the point of sale (see Figure 1). Many organizations have created, or are in the process of creating, strategic sales enablement functions with the objective of boosting the productivity of the sales force.

When given the objective of boosting sales performance, many sales enablement professionals set out with a simple plan to fix the content, provide a sales portal, or do something new with training — only to realize the problem is broader and more intertwined that they had originally thought. As one director of global sales enablement told us, "Every time I think of the challenges we are faced with, it feels like quicksand. I need help on how to keep my head up, so I don't drown."

Unfortunately, Forrester cannot take away the complexity of the problem — but we can provide a lifeline to help you to safety. To be successful, you really need to understand the systemic nature of the problem. Even if you fix some tactical problems along the way, the inertia of the organization will work against your initiatives unless you have a way to cope with the complexity. The problem begins with your executive leadership.

Figure 1 The Selling System Is Complex And Overburdens The Sales Force

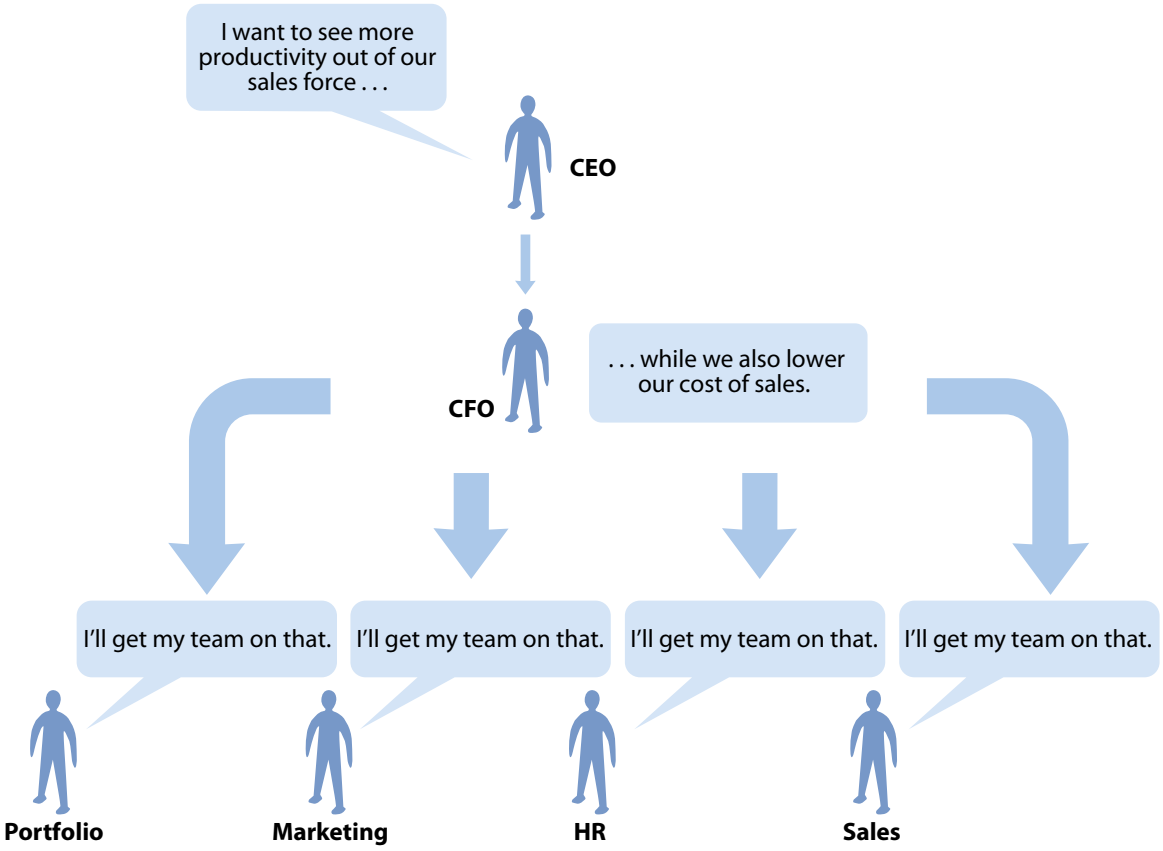


57041 Source: Forrester Research, Inc.

Executive Frustration Puts Urgency Into Supporting Sales . . .

CEOs at technology industry firms are hearing two things. Customers are telling them they need to add more value and elevate their game — partnering with them to solve business problems, not selling them more products. Investors are asking them why their cost of sale is growing so much and what their plan is to boost margins. These chief executives develop strategic plans, expand their portfolios, invest in promoting a vision for success, and ask their sales leadership to retool their sales forces. However, change isn't happening quickly enough for most, and some frustration is beginning to set in (see Figure 2).

Figure 2 Huge Amounts Of Activity Follow A CEO's Demand To Help Sales



57041 Source: Forrester Research, Inc.

. . . Which Creates A Flurry Of Activity Among The CEO's Direct Reports . . .

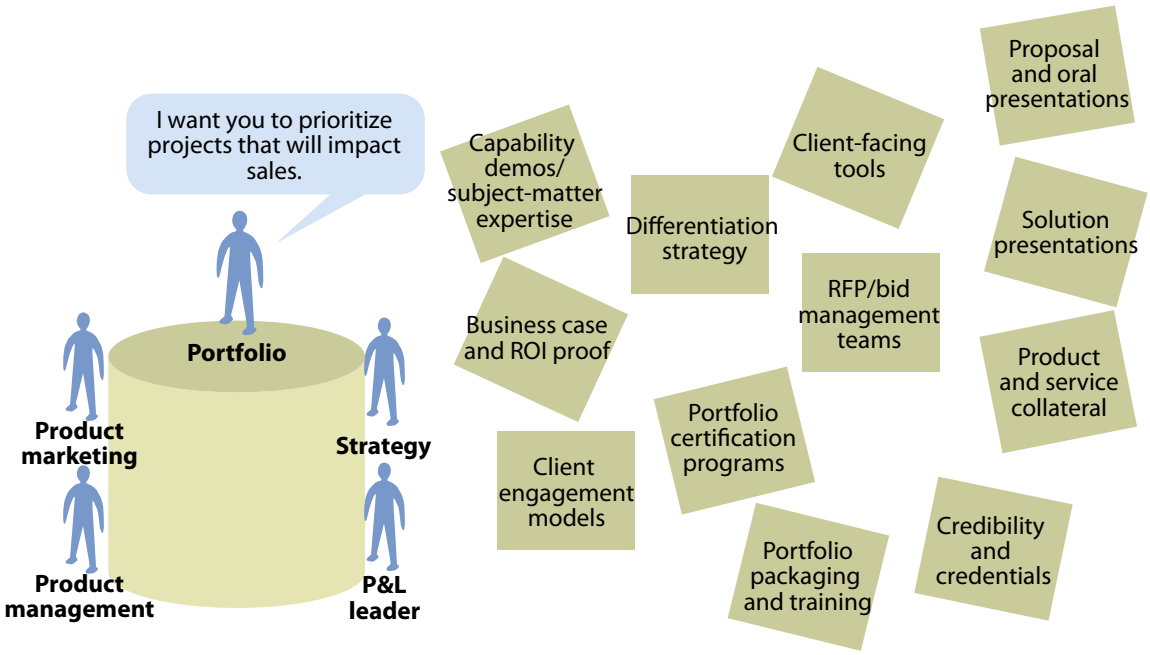
In response, the CEO's direct reports each answer the call to boost sales performance differently, through their own lens:

- **Portfolio and business units.** Portfolio and business unit heads respond by creating more materials or asking their subject-matter experts to play larger roles in the sales process (see Figure 3).
- **Marketing teams.** Marketing teams invest in a variety of content assets or programs (see Figure 4).
- **Human resources.** Human resources and university or learning functions focus on activities like hiring, coaching, and skill development (see Figure 5).
- **Sales organizations.** Sales organizations also tend to focus on the human side of things by expanding support functions, developing new methodologies, or reviewing coverage models (see Figure 6).

To demonstrate that they are taking action, each of these managers reports to the executive leadership on all of the activities and resources they are throwing at the problem. When rolled up, here's an example of how management communicates what it is doing to seize on the market opportunity:

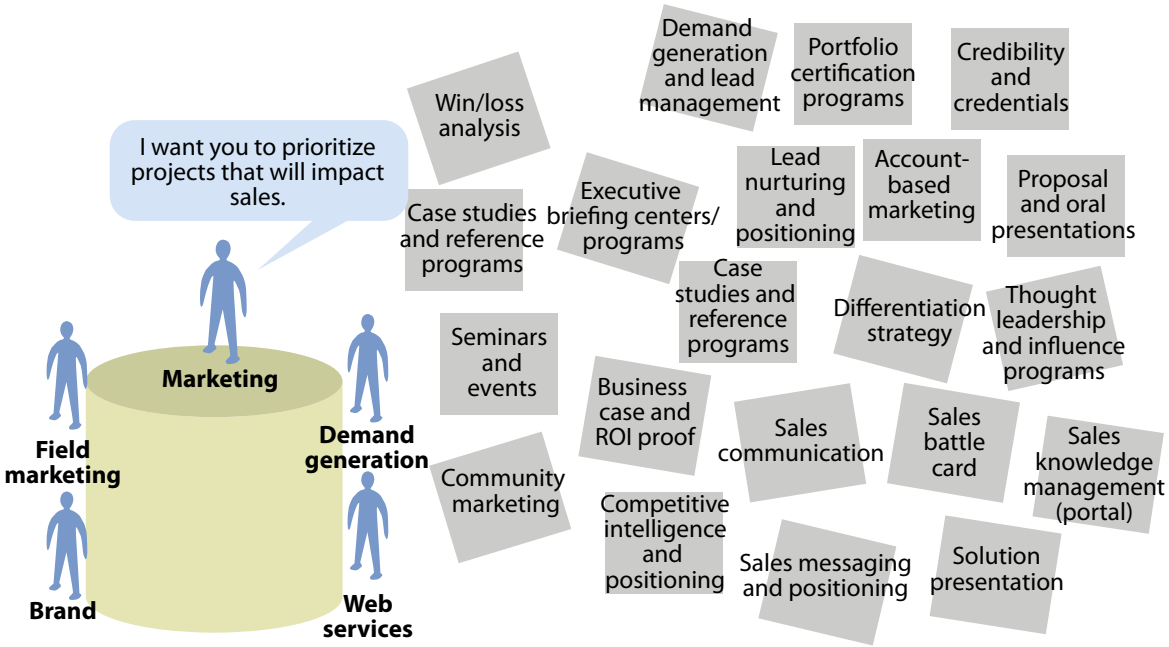
> "I think that we now spend more in training per frontline sales professional than almost anyone in the industry. And that doesn't include the days that they are out of the field; that's just investment in content and skills training to deliver to those people so that they can be more effective. And we've given them the tools to be effective. Great CRM [customer relationship management] account planning tools and . . . we have the sales workbench out there. It's a portal where they have all the collateral, all the marketing materials, all the selling arguments for every one of our products on a portal that they can use. And they hadn't had that in the past."[1] (Michael J. Christenson, president and chief operating officer, CA)

Figure 3 Business Unit And Portfolio Heads Create Random Acts



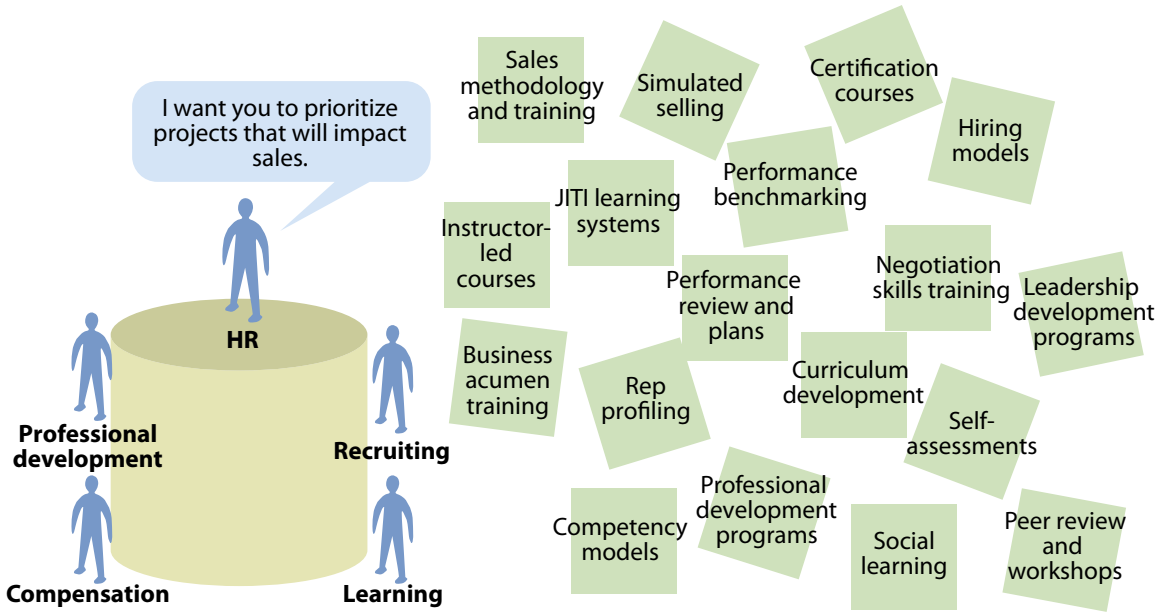
57041 Source: Forrester Research, Inc.

Figure 4 Marketing Departments Create Random Acts



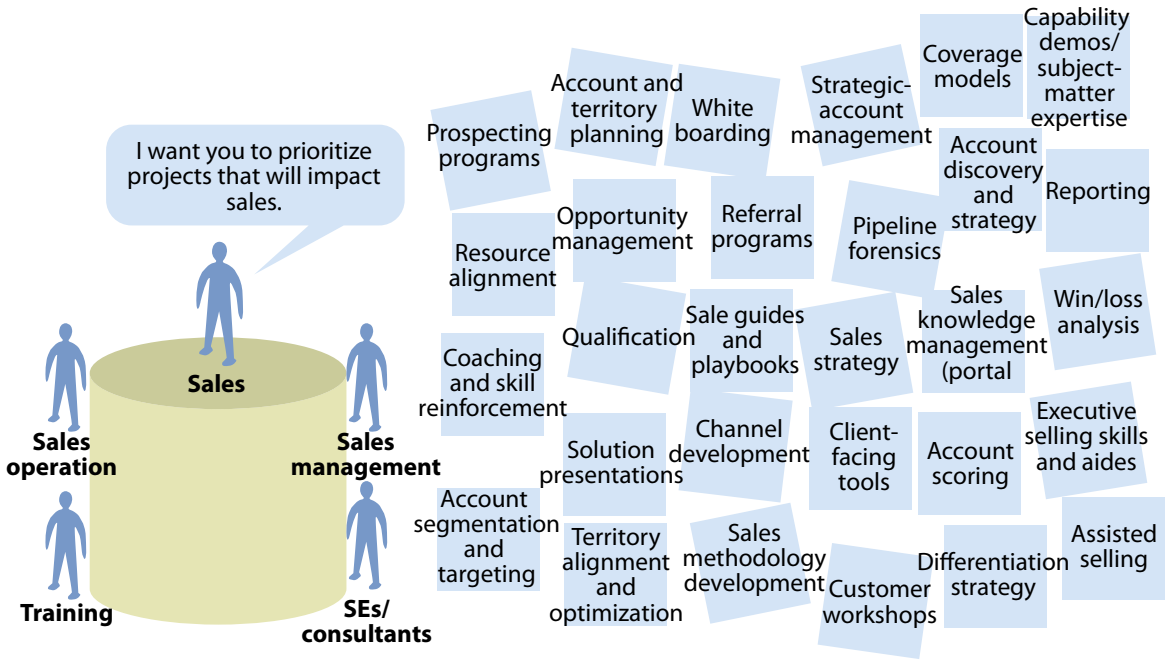
57041 Source: Forrester Research, Inc.

Figure 5 Human Resource Departments Create Random Acts



57041 Source: Forrester Research, Inc.

Figure 6 Sales Departments Create Random Acts



57041 Source: Forrester Research, Inc.

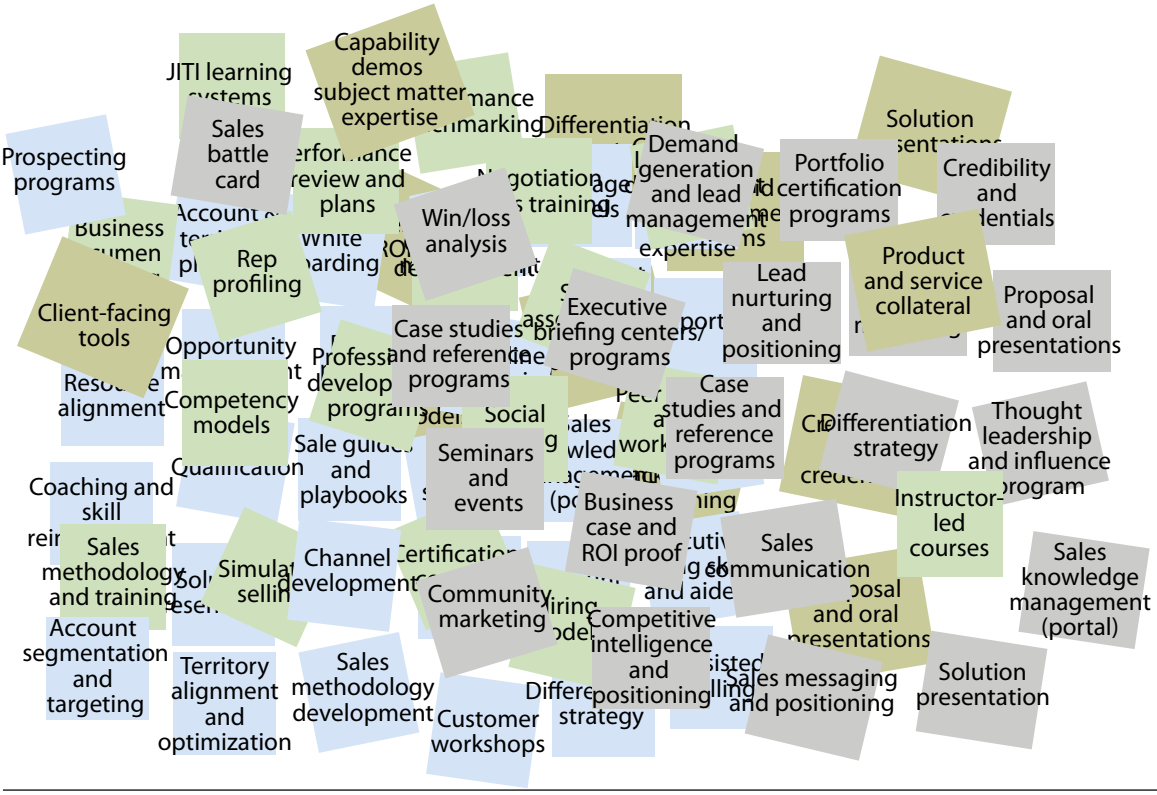
. . . Resulting In Information Overload For Sales Teams

The sum total of all of the resources invested to "help sales sell" is massive. In fact, Forrester estimates that the average technology vendor is spending more than $135,000 to support each quota-carrying salesperson. This doesn't include their salaries or travel and entertainment expense — only the amount of money associated with headcount and external spending supporting the sales organization. This is part of the problem because executive management is aware of the investments they are making in their sales force and wants to know how that investment is driving results.

When you look at the world through the prism of a salesperson — the view is quite different. Few of these investments have a specific design point or focus (Are they resources to help salespeople gain access? Who, specifically, is the audience for a thought leadership paper?) and even fewer of them are designed to work within the selling methodology of the sales organization. Many product marketers actually compete against one another for mindshare of the sales force. It's not uncommon for subject-matter experts from different business units to disagree with one another over what the client actually needs — and the salesperson has no way of determining who is right. Skills learned in one training course are frequently contradicted by the specific actions their sales management directs them to perform (see Figure 7).

Essentially, what's happening is that, lacking any organizing structure, these random acts of sales support are canceling one another out. Thus, the executive management thinks the problem rests with having the wrong salespeople, and the sales teams believe they are not properly supported. This is the problem that sales enablement professionals need to identify, surface, wrestle to the ground, and attack systematically.

Figure 7 Random Acts Of Sales Support Create Unneeded Complexity, Overwhelming Sales Forces



57041 Source: Forrester Research, Inc.

COMBAT COMPLEXITY WITH A SIMPLE FRAMEWORK

Simplifying the selling system is the key to success for most businesses, but it's definitely a daunting task. Very few sales enablement practitioners have had any kind of formal training or experiences to equip them to combat the complex problem in front of them. In many cases, the problem looks like a 5,000-piece jigsaw puzzle, with no cover to help the maker figure out how to put the pieces together. To combat random acts of sales support, sales enablement professionals need 1) a way to categorize all of the various initiatives, and 2) the patience to attack the problem in a serious of management phases over time.

What Is A Framework?

To achieve these objectives, you need an organizing construct to help you categorize your current state, otherwise known as a framework. You have applied frameworks in the past — you may have known it at the time. In biology, you used the classification system; in chemistry, it was the periodic table. Scientists have used frameworks for a long time to help understand the world around them. Here is a more specific definition of a framework:

> "Problems cannot be articulated except within a conceptual system. No inquirer can investigate a problem from all perspectives simultaneously. And that is what a logical structure or theoretical framework is all about. It establishes a vantage point, a perspective, a set of lenses through which the researcher views the problem. In this sense, the selection of a logical framework is both a clarifying and exclusionary step in the research process. While it sharpens focus and consequently increases clarity brought to the problem area, it excludes from the view of the inquirer other perspectives that might be brought to bear on the problem, but does so in explicit recognition of those perspectives and the rationale for their rejection."[2]

Forrester's SIMPLE Framework For Sales Enablement Professionals

The SIMPLE acronym defines the scope and purpose of our framework, as it's focused to help sales enablement professionals understand the right combination of sales initiatives, marketing programs, and leadership excellence (SIMPLE) required to properly, effectively, and systematically transform random acts of sales support into an efficient selling system. The SIMPLE framework is organized into two distinct but related sections designed to help sales enablement professionals maintain a balance between management activities and supervising a wide range of initiatives.

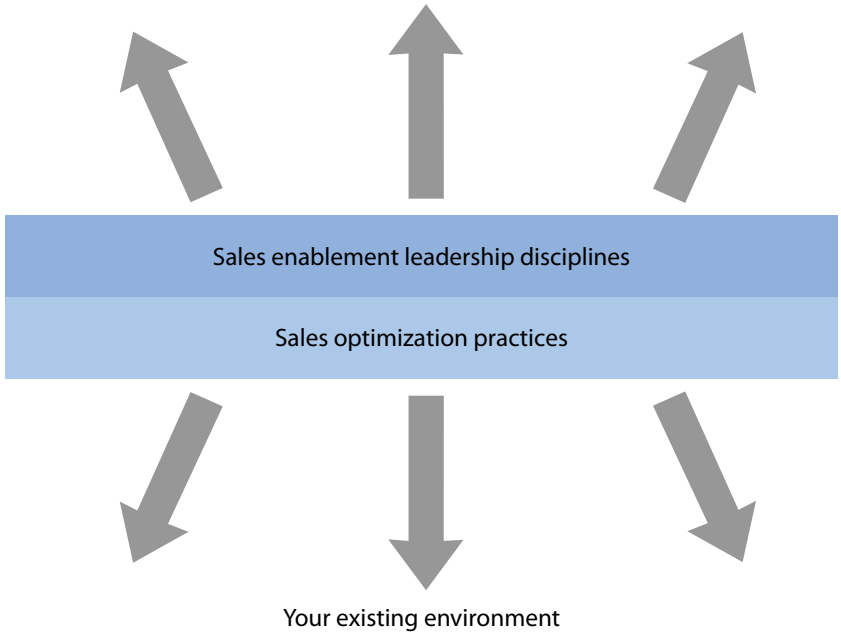
- **Leadership disciplines.** These are a collection of competencies that a sales enablement leader must develop and master over time in order to deliver the breakthrough performance results made possible by systematically optimizing the selling systems.

- **Optimization practices.** These practices include a variety of categories to organize and manage a distributed set of initiatives within an organization — regardless of their origin (see Figure 8).

When we were defining the framework, one of the core design points was to make it simple enough to work within smaller organizations but flexible enough to fit within the organizational matrices of some of our larger clients. During our field test period, we learned that, with some very minimal modification, it can easily be applied in all kinds of different companies. Just be aware that you will first need to understand the core principles before you begin to have success in application (see Figure 9).

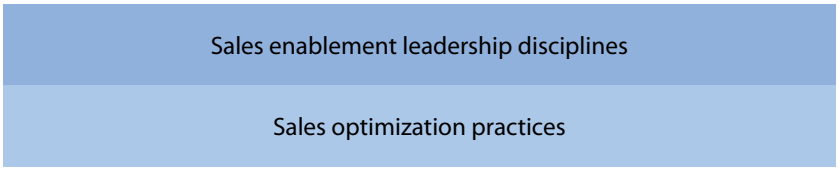
Each section of the framework is comprised of component pieces with their own definitions and purposes. The objective here is to provide a single point of reference as well as some flexibility to help guide you along your journey as you simplify your selling system (see Figure 10 and see Figure 11). Throughout your journey, you will be confronted with different challenges — starting with helping other affected internal stakeholders to understand the breadth and scope of the challenge. Over time, you will use the framework to consolidate initiatives or drive cross-functional collaboration. In every case, the framework provides the foundation to manage out complexity in discrete, manageable phases.

Figure 8 Leadership Disciplines And Sales Optimization Practices Are The Core Of The Framework



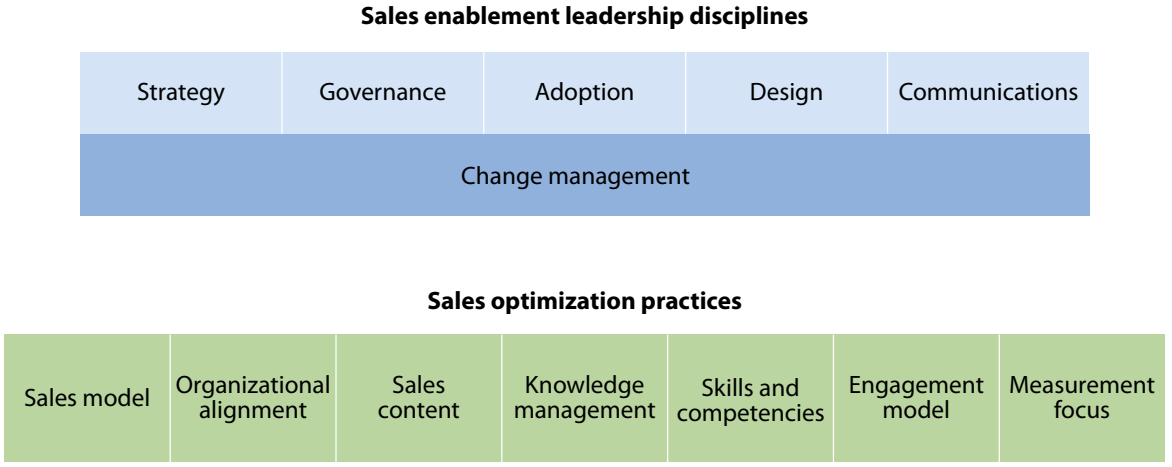
57041 Source: Forrester Research, Inc.

Figure 9 The Framework Is Designed To Work Within Your Organization



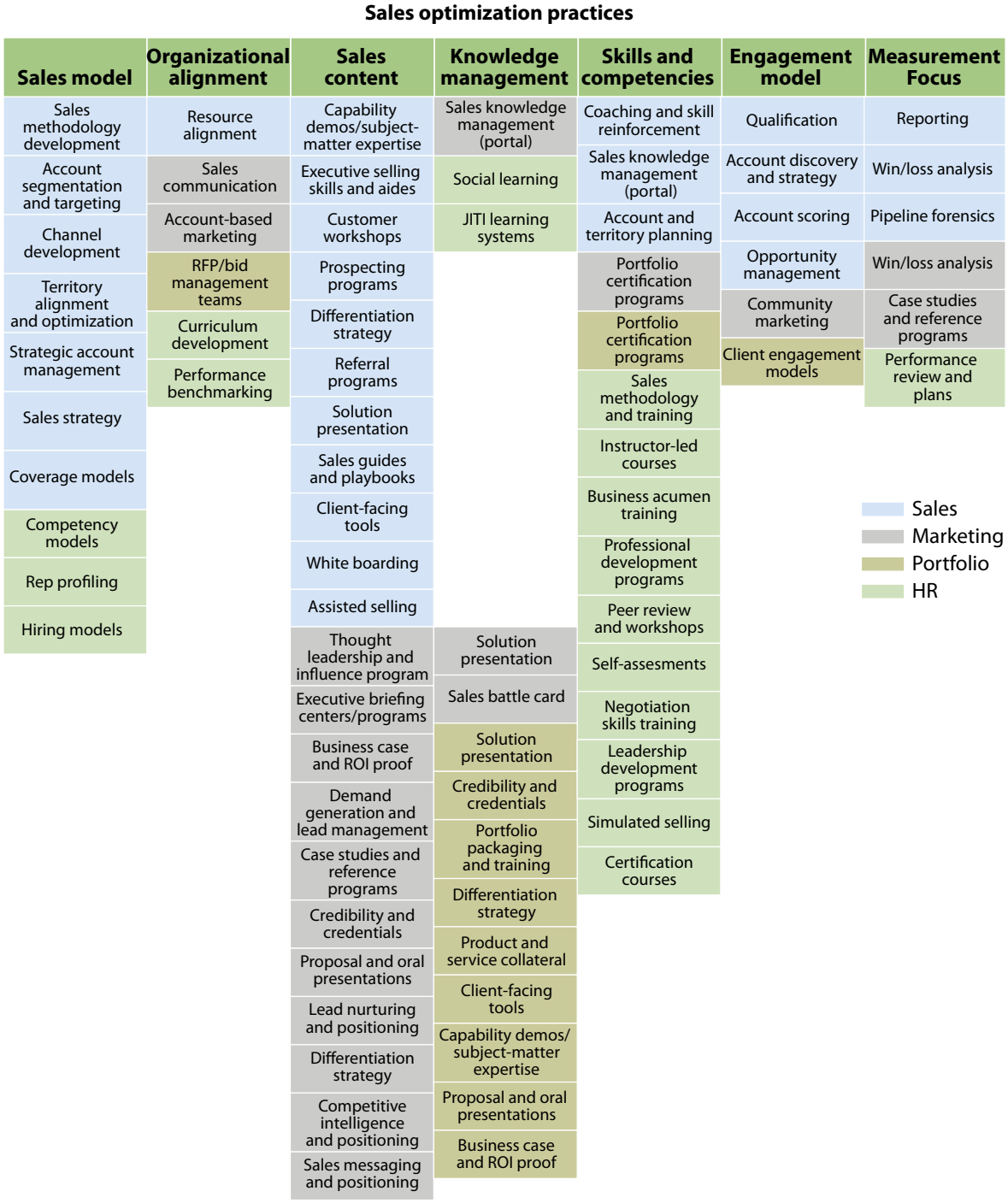
57041 Source: Forrester Research, Inc.

Figure 10 The SIMPLE Framework



57041 Source: Forrester Research, Inc.

Figure 11 SIMPLE Framework Definitions



57041 Source: Forrester Research, Inc.

Corralling Complexity By Categorizing Random Acts

The remainder of this report is designed to provide you with some conceptual examples as guidance on how to apply the framework inside your organization.

START THE SIMPLIFICATION PROCESS USING FORRESTER'S SIMPLE FRAMEWORK

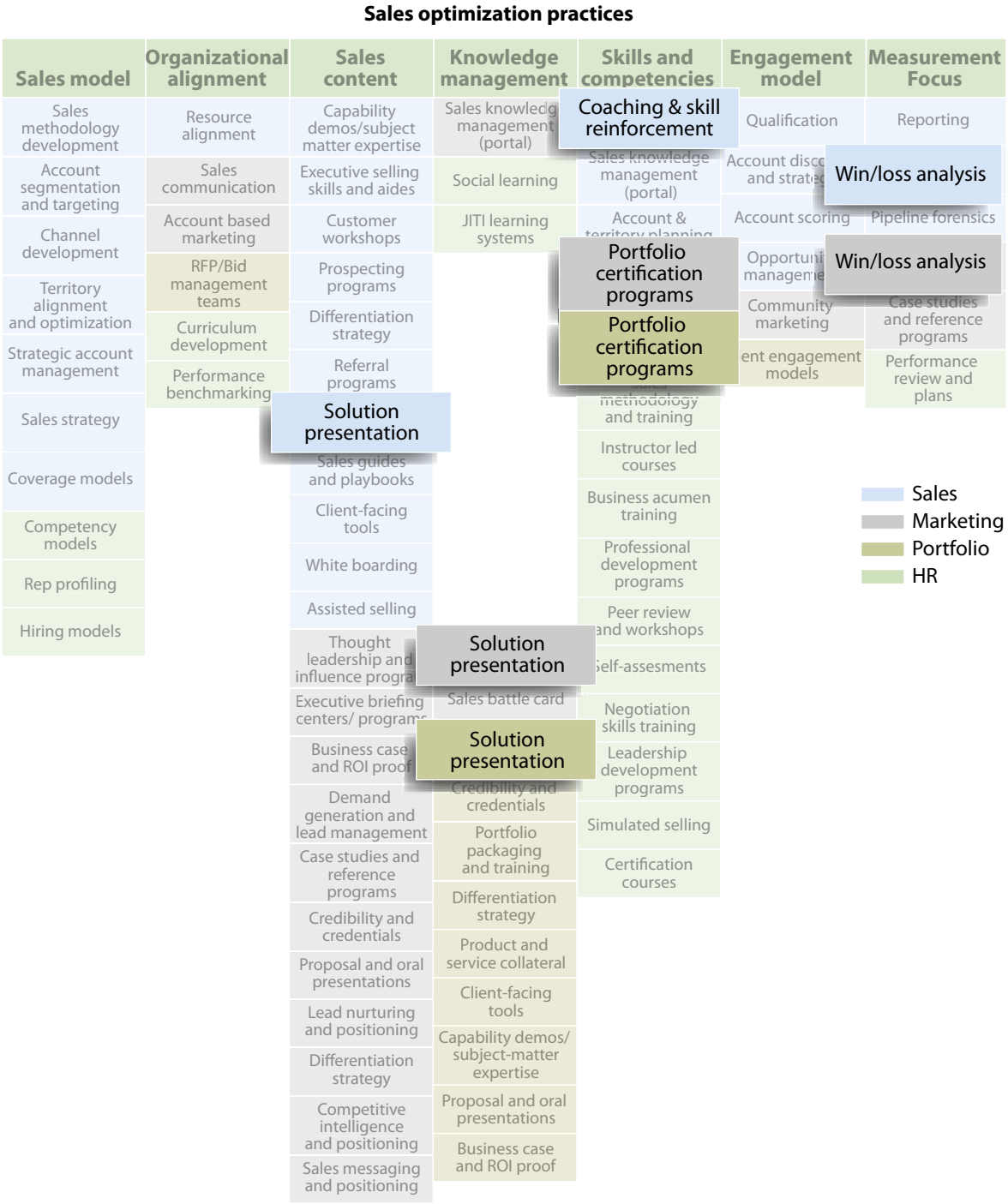
Just as when you attack any other complex problem, the strategy here is to get a handle on how big the problem is, categorize it, and then break it down into smaller phases to methodically address it over time. Each phase must offer its own distinct and tangible value and be additive in nature. Here is the process for applying the framework; it's drawn from real-world examples of how our clients are using the framework today within their own organizations.

1. Visualize The Problem

The first step is to begin building an inventory of all the various sales support resources and initiatives and grouping them into the sales optimization practices categories. Start in your department, go on to the various sales portals, interview other groups, and you will be surprised at how quickly your spreadsheet gets unruly. The key objective here is to actually help communicate to all of the department heads of the various random acts about what the problem is and to help executive management actually see how many different resources are all vying for the attention of the sales force (see Figure 12).

Regardless of the department you speak with, you are going to find people who see part of the problem, but very few executives see the full scope and scale of the random acts issue. Senior executives tend to overlook the challenge that salespeople face in connecting the dots to use all of these materials, while individual department heads see the world through their respective lenses. For example, one VP of product marketing was frustrated about why people were not using the huge array of super tools his team had developed for sales. When presented with the findings, he went from "What's wrong with the sales force?" to "Oh, my goodness, what can I do to help?"

Figure 12 Categorize Random Acts To Help Others See The Problem



57041 Source: Forrester Research, Inc.

2. Eliminate Redundancy

After gaining a shared understanding among various department leaders about the enormity of the problem and the urgency of the need to begin reducing the number of sales support resources and applying some order to them, you should post a quick win. Across so many different groups, with such poor structure — and virtually no governance — you are bound to come across a significant number of resources that are duplicative in scope and purpose; this is a common problem. Capability or solution presentations are created by product teams, marketing groups, and sales teams so often that it's not unusual to have many different versions of the same presentation floating around the organization. Another common example is for sales teams and marketing groups to conduct their own win/loss analyses with different design points. It's typical for both groups to present different results (see Figure 13).

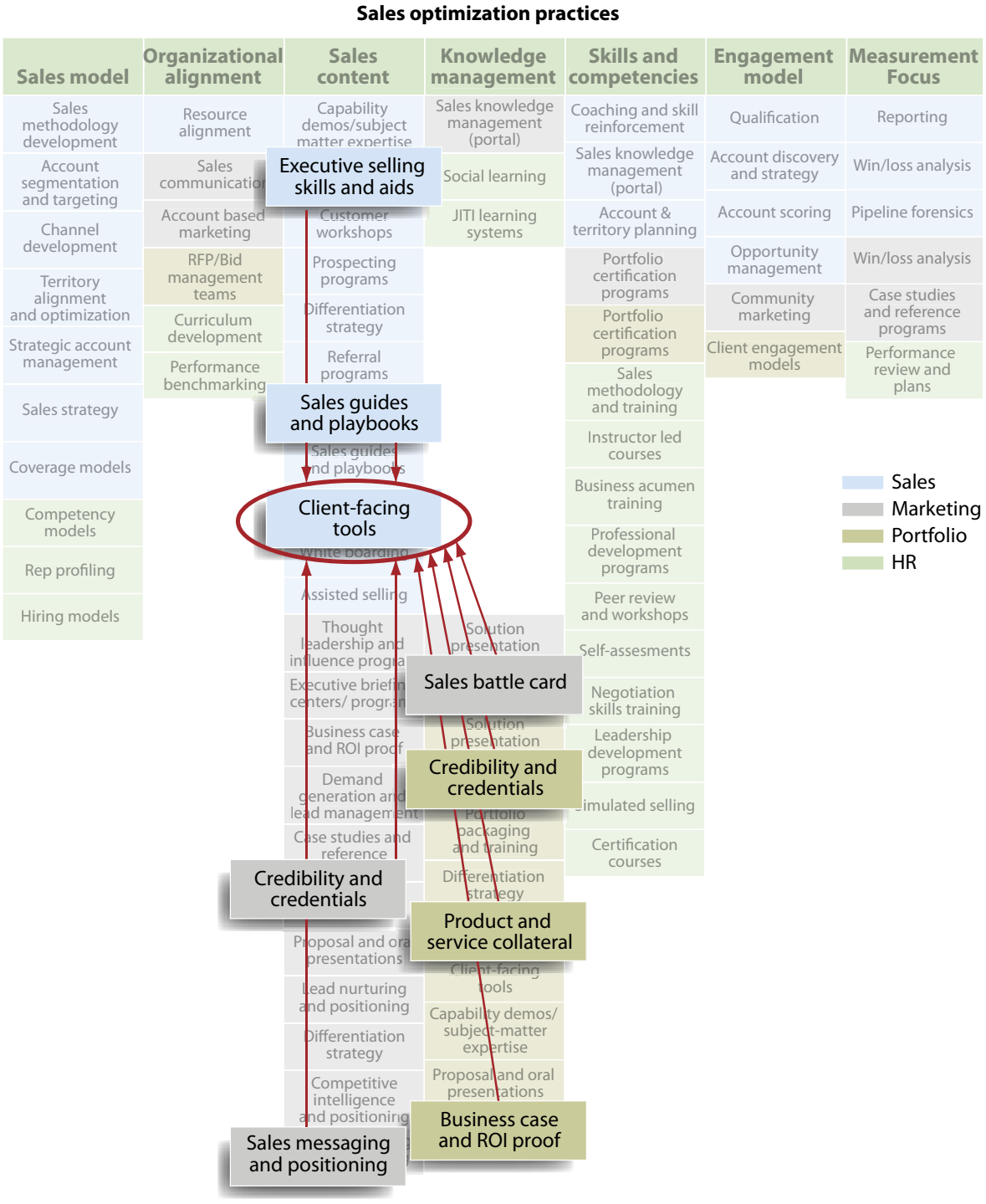
The point is that, by finding these redundancies, you can raise the issue to the appropriate management chain and eliminate redundant or unneeded projects. You should be able to cut about 10% to 15% of the initiatives with almost no pain.

3. Consolidate Related Programs

Provided that the cost reductions and wins gained in phase two were successfully communicated to the right people (refer to the communication leadership discipline), sales enablement professionals can then begin to examine the remaining initiatives in order to consolidate work efforts. By combining several efforts into one larger project, you can actually pool the various budgets into one larger source while reducing the overall spend. This improves the quality of output and forces more structure across other touchpoints to sales (see Figure 14).

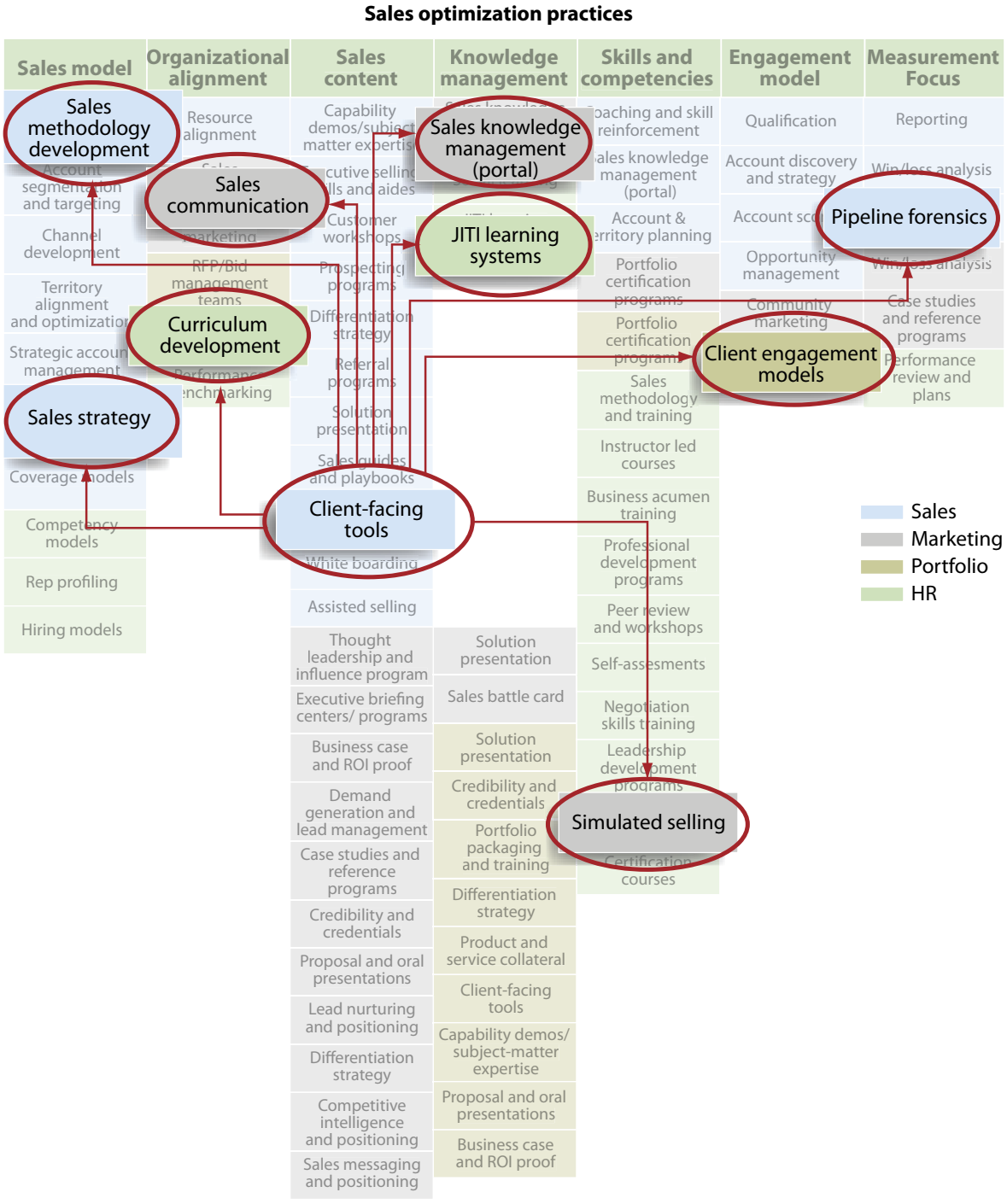
Good examples of this are all of the various discrete support tools, many lacking a common design point, that get created for salespeople. Salespeople have to use these resources at different points in their selling cycle and for different reasons, like getting a meeting or supporting a business case. However, the output of these investments tends to be of the form of the deliverable, with a look and feel or other design point focused on how a salesperson will actually use it. By combining all of these initiatives and deliverables into one project, sales enablement professionals can pool the budgets of battle cards, competitive intelligence, or other programs into one effort that benefits from more available funds at less aggregate cost. In addition, the usefulness of these related work projects to salespeople increases because they are now all related, organized, and cross-referenced to one another. Some of our clients are even bypassing the whole idea of supplying organized kits of sales support resources in favor of developing a suite of client-facing materials that helps further drive adoption.

Figure 13 Find And Eliminate Redundant Activities



57041 Source: Forrester Research, Inc.

Figure 14 Merge Related Efforts Into Consolidated Projects



57041 Source: Forrester Research, Inc.

4. Coordinate Resources Across Silos And Practices

With fewer initiatives managed by more-senior people, sales enablement professionals can begin mapping all of the other activities that go into making each project successful and identifying ways to improve the impact on sales efficiency of a given project of the program (see Figure 15).

Continuing the example about better packing and organizing a suite of related efforts to be more useful to sales, the key question is how to weave that program into the bloodstream of the sales organization to accelerate the usage and return on investment. This is where process mapping is useful.

To reinforce the selling strategy and new sales methodology, the content program must clearly reinforce the objectives and principles laid out by both. Wins and use cases from other salespeople leveraging the program will need to be reinforced in the sales communication program, while details and content are infused in the training curriculum.

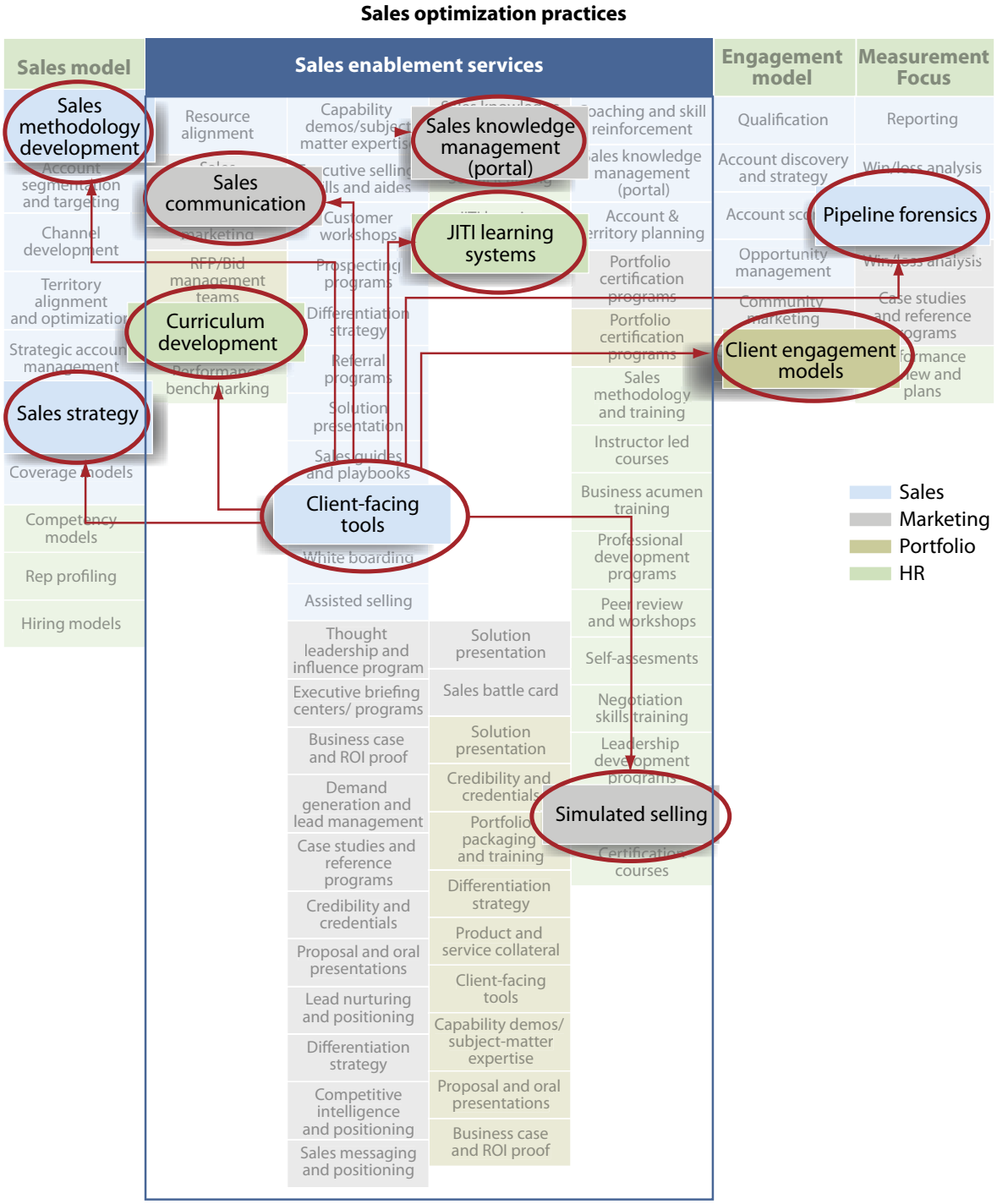
The materials need to be accessible to salespeople, so there must be a tight integration with any sales knowledge management efforts — and working with training professionals to develop just-in-time coaching vignettes (such as how to talk to a CIO about this content) that can be delivered through learning systems is key. As part of that effort, simulated selling programs might be developed to help salespeople actually use the client-facing tools in the most effective way and to reinforce the detailed client engagement models developed by sales operations or consulting groups. Finally, the right measurement strategy needs to be developed, one that is consistent with how the sales force analyzes the pipeline. These are just a few of the integration points required to optimize the value of any program and are essential to anchor and systematize any sales enablement effort.

5. Orchestrate Cross-Functional Resources To Deliver Sales Enablement Services

After process modeling and measuring a few projects end-to-end, sales enablement professionals can begin to define a catalog of tailored services designed to provide cost-effective support services to meet a given strategic sales objective (see Figure 16).

For example, a named account sales channel might be behind in its pipeline development. With some simple analysis, the sales enablement team can quickly isolate the problem and provision a turnkey program that collects data about a targeted list of clients, develops messaging in conjunction with the sales team, creates account-specific microsites, and partners with those sales teams to deliver those sites to executives within those accounts. The team will also be creating an internal just-in-time training site to provide salespeople with the skills and context they require in order to follow up on those opportunities, as well as a complete dashboard of metrics to monitor success — all within a month.

Figure 15 Map Business Processes To Drive Coordination Across Related Activities



57041 Source: Forrester Research, Inc.

Figure 16 Develop Sales Enablement Business Services

Sales enablement leadership disciplines

	Strategy	Governance	Adoption	Design	Communications	Change management
Key questions	How does the business strategy fit with different groups' execution strategy?	How can resources be better coordinated accross the system?	What needs to be done to develop more consistent and repeatable ways to roll out programs to the sales force?	How can the various resources and perspectives be structured to reduce complexity for the sales force?	How can all stakeholders involved in the value chain behind sales be better informed but not overwhelmed?	How can transformation be driven with minimal distruption to ongoing operations?
Representative examples	• Coverage model • Overcoming complexity • Value delivery strategy • Altitude level/ comfort zone • Executive sponsorship	• Message • Resource • Capability • Skill • Process	• Usage testing • Sales ambassadors • Alignment with sales strategy • SWOT teams • Field testing	• Customer patterns • Portfolio mapping • Sales scoring • Standardization • Architecture	• Cadence • Frequency • Medium • Sharing • Collaboration	• Iteration definition • Program management • Readiness assessments • Phases and plateaus • Execution criteria

Sales optimization practices

	Sales model	Organizational alignment	Sales content	Knowledge management	Skills and competencies	Engagement model	Measurement focus
Key questions	What does the selling system look like, how are resources allocated, and how is it managed?	How do groups work effectively accross the organization to reduce complexity?	What specific assets and resources need to be supplied to sales?	How is sales content delivered effectively to different sales forces?	What behaviors are required by selling teams to deliver the information to customers?	What are the communi-cation objectives that customers require at different milestones?	How do metrics need to be developed and communi-cated to manage the system?
Representative examples	• Compen-sation plan • Resources • Selling focus • Comfort zone • Sales capacity	• Process integration • Workflow develop-ment • Process mapping • Organizing structures • Collabo-ration	• Thought leadership • Marketing programs • Collateral • Tools • Subject-matter experts	• Portals • Interactive selling guides • Content delivery • Schematics • Information architecture	• Learning programs • Buyer empathy • Scenario simulation • Certification/ onboarding • Experiental training	• Situational-specific programs • Gaining access • Successful meeting • Shared vision of success • Creating a business case	• Executive-level dashboard, progress tracking • Operational metrics, workflow measures • Financial analysis • Cost controls

57041 Source: Forrester Research, Inc.

RECOMMENDATIONS

PITFALLS TO AVOID WHEN CORRALLING RANDOM ACTS

The application of the SIMPLE framework is useful over a long period of time, and there are a few principles that sales enablement professionals should fully understand to maximize its utility. All of these challenges, and how to overcome them, were discussed and debated with our Leadership Council of sales enablement professionals who are navigating these waters every day.

- **Get really strong buy-in on the problem first.** Just because the problem is clear to you or to your sponsoring executive doesn't mean it is to other leaders or peers in different organizations. Resist the urge to start doing things without first making sure all of the key people really understand the breadth and depth of the problem.
- **The finance department is your friend.** After you articulate the full scope of the problem, you will need to produce quick wins. Instead of getting into turf battles when talking about the elimination of programs or budgets, it's better to have the backing of finance to help you adjudicate the issues that will arise.
- **Be patient.** You should resist the urge to try to tackle too much too quickly. There are big differences between finding duplicative work and consolidating related projects. To be successful, you will need to find ways to institutionalize some of the changes made in each phase and build up your support coalition to begin moving to the next one. This is a leadership endeavor, after all.
- **Always think about "what next."** Your executive sponsorship will want to know what's happening but will also want to have a clear view on what you will do next. Your focus to most of the organization needs to be about achieving the objectives for your given milestone, and you should be socializing your next phase with your executive leadership at the same time. Like it or not, you are running a change management project in your organization. You need to balance the microsteps required by most workers to help them avoid confusion against the need to communicate with management about the path you are following.
- **Manage light-bulb moments carefully.** Do not underestimate the strength of the muscle memory associated with random acts in your organization. The whole approach of delegating deliverables to individual contributors who feel a sense of ownership over their turf and projects is a huge barrier to overcome. In later stages, shifting the focus from deliverables to services can be even harder. You need to develop a whole strategy built around group working sessions, internal communication programs, and other ways to help the supply chain behind sales see the problem and have "aha" moments. You should invest at least 30% or more of your time in focusing on communicating what you are doing and keeping the buy-in. Without that investment of your time, the inertia of the status quo will drag you and your progress backward to old habits and random acts. You must hold the territory you gain in order to win more.

ENDNOTES

[1] Driving down the cost of sales, while simultaneously boosting productivity, continues to be a top business priority and an objective that requires a new way to support and evaluate the sales system. Executive management lacks the visibility into the cause-and-effect relationships between sales support investments and their impact on productivity. To help address this issue, technology sales enablement professionals should begin driving coordination across the various groups that supply the sales force with resources and streamline these deliverables into measurable programs that will improve the business. See the July 17, 2009, "Optimize Performance By Driving Enterprise Sales Outcomes" report.

[2] Source: Daniel Cline and David L. Clark, "Logical Structure, Theoretical Framework," *A Writer's Guide To Research And Development Proposals* (http://education.astate.edu/dcline/Guide/Framework.html).

FORRESTER®

Making Leaders Successful Every Day

Headquarters

Forrester Research, Inc.
400 Technology Square
Cambridge, MA 02139 USA
Tel: +1 617.613.6000
Fax: +1 617.613.5000
Email: forrester@forrester.com
Nasdaq symbol: FORR
www.forrester.com

Research and Sales Offices

Forrester has research centers and sales offices in more than 27 cities internationally, including Amsterdam; Cambridge, Mass.; Dallas; Dubai; Foster City, Calif.; Frankfurt; London; Madrid; Sydney; Tel Aviv; and Toronto.

For a complete list of worldwide locations visit www.forrester.com/about.

For information on hard-copy or electronic reprints, please contact Client Support at +1 866.367.7378, +1 617.613.5730, or clientsupport@forrester.com.
We offer quantity discounts and special pricing for academic and nonprofit institutions.

Forrester Research, Inc. (Nasdaq: FORR) is an independent research company that provides pragmatic and forward-thinking advice to global leaders in business and technology. Forrester works with professionals in 19 key roles at major companies providing proprietary research, customer insight, consulting, events, and peer-to-peer executive programs. For more than 27 years, Forrester has been making IT, marketing, and technology industry leaders successful every day. For more information, visit www.forrester.com.

FORRESTER®