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Sales Onboarding, Enablement & Training cheat sheet for B2B SaaS

The Foundations

RevOps Lab Podcast episodes on Designing High-Performance RevOps #90;

Definition

📌 **What is Sales Enablement?**
Sales Enablement is the strategic, cross-functional discipline designed to equip sales teams with the tools, content, training, and guidance to engage buyers and close deals more effectively.

🔑 **Goal:** Enable reps to sell more, faster, and better through scalable support systems and insights.

Core pillars

Pillar	Focus	Tactical Actions
Training & Onboarding	Ramp reps to quota quickly	Build role-specific playbooks, certifications, and LMS paths
Content Enablement	Deliver relevant, timely content	Align content to stages, track usage & ROI
Sales Readiness	Ensure reps are "buyer-ready"	Run mock calls, quizzes, certifications
Cross-functional Alignment	Sync with marketing, product, RevOps	Establish SLAs, feedback loops
Insights & Analytics	Measure impact & optimize	Track content usage, time-to-quota, win rates

Impact

Outcome	Uplift (vs. non-enabled orgs)	Source
Win Rate Increase	+27%	CSO Insights, 2023
Time to Quota Ramp	35% faster	HubSpot, 2023
Quota Attainment	+22% higher	Sales Enablement Pro, 2024
Revenue Growth	+6-12% YoY	SiriusDecisions (Forrester)
Sales Productivity	+20% more selling time	Gartner, 2023

What experts think

"Defining the sales methodology enables the sales training formula to be scalable and predictable. The three elements of the sales methodology are the buyer journey, the sales process, and the qualifying matrix."

Mark Roberge | Founding CRO, Hubspot

Roles & Competencies Map

Role	Core competencies	Enablement and Training Focus	Evidence to score (CRM + calls)	Cert gate (pass/fail)	KPIs
SDR (Inbound/Outbound)	• ICP targeting & list quality • Messaging & call/email execution and meeting quality • Speed-to-lead & routing hygiene	• ICP & messaging kit + objection snippets. • Sequencer playbooks with a meeting-quality checklist. • Clean AE handoff template and "first 10 calls" playlist.	• Lead touched within SLA; record shows a dated Next Step with owner. • Required fields complete (source, persona, company size). • Call/email shows problem stated + next action; no "ghosted" leads sitting idle	• 5 touches (mix of calls/emails) that meet the messaging + discovery checklist. • Pass = dated Next Step on record + correct fields filled + no stage move without evidence	• Speed-to-lead <5 min (high intent) • SAL/SQO rate • % meetings with buyer-owned next step
AE (New Business)	• Multithreading to power • MAP ownership • commercial discipline (deal quality & slip control)	• Discovery & value narrative kit (questions, recap, proof). • MAP starter + multithreading guide (who to add, how). • Demo storyline with proof assets and a readiness/cert path.	• Discovery notes captured (pain, impact, success criteria) and contact roles set (Champion, EB, etc.). • MAP link attached by Qualification with buyer-owned next steps and target dates. • For Commit deals: recording or note of a meeting with the budget decision-maker + active MAP/POC	• 1 live role-play (discovery → recap → next steps) and 2 real opportunities that meet exit criteria: • EB identified and engaged, active MAP with dated next step, and discovery checklist complete. • Pass = both opps meet exits; Fail = missing EB/MAP or undated next steps	• Stage to stage conversion 20–35% • Win rate by segment • Slip rate trending down
AM / CSM (Retention & Expansion)	• Renewal discipline & risk forecasting • Value realization & success planning • Expansion spotting • Exec alignment	• Success plan template + renewal playbook (risk triggers, saves). • Expansion plays (triggers, talk tracks, assets). • QBR storyline pack with exec-sponsor outreach templates	• Success plan on account/opportunity: goals, milestones, risks, and named stakeholders. • Approval path and proof plan documented early (e.g., security review, legal timeline). • Renewal kickoff scheduled within 7 days of handoff; notes show measurable value delivered	• 2 renewals + 1 expansion documented with: • Success plan attached, executive sponsor/EB engaged, and dated next steps in CRM. • Pass = all three meet evidence; Fail = missing sponsor, plan, or next steps	• GRR/NRR and Expansion pipeline coverage • Time-to-first-value • Slip rate (>2 moves) down.
Sales Manager (1st/2nd line)	• Coaching cadence & deal inspection • Forecast standards & hygiene enforcement • Enablement follow-through	• Coaching operating system: pipeline agenda + inspection rubric. • CI scorecards and "watch-this-call" playlists. • Manager dashboard pack with coaching-coverage tracking	• Weekly 30-min pipeline review in CRM (no slides) covering changes, risks, actions. • Commit deals meet the two-proof rule: EB meeting recorded and active MAP/POC. • Stage moves blocked without exit evidence; coaching notes logged on two calls per rep	• 3 deal inspections passed using the inspection rubric (evidence present, risks clear, next steps dated). • 2 call-coaching sessions per rep per week recorded for a full month (coverage visible on dashboard). • Pass = all inspections passed + coaching coverage met; Fail = misses on either	• Forecast variance control (WAPE ≤15%) • ≥90% opps with dated Next Step • Weakest-stage conversion +3-5 pts after coaching.

Benefits

Benefit	Why It Matters
Better Marketing Alignment	Content aligned to real-world sales needs; less waste
Buyer Experience	Reps provide more relevant, helpful, personalized content
Institutional Knowledge	Playbooks, wikis, and call libraries scale tribal knowledge
Data-Driven Coaching	Insights from calls, CRM, and LMS enable targeted upskilling
Deal Velocity	Less friction from buyer education = faster closes
Higher Win Rate	Better discovery + multithreading + MAPs boost Commit to Close

Framework (RACI-style)

The Sales Enablement Framework (RACI-style) assigns clear ownership by defining who is Responsible for creating and executing enablement programs.

R - Responsibile A - Accountable C - Consulted I - Informed

Function	Training	Content	Messaging	Feedback
Sales	C	C	I	A
Enablement	A	A	C	C
Marketing	I	A	A	C
Product	C	I	C	C

Metrics that matter

Category	Metric	Why It Matters
Productivity	Time to 1st deal / quota	Shows ramp effectiveness
Engagement	LMS/course completion	Measures rep engagement
Impact	Win rates, deal velocity	Links enablement to revenue
Content	Usage, engagement, influenced deals	Content ROI
Call Quality	Talk ratios, objection coverage	Sales readiness proxy

FREE RevOps Metrics Cheat Sheet

Onboarding & Training

FREE Sales Enablement Cheat Sheet

RevOps Lab Podcast episode on Automating CRM entry with AI, #96

Onboarding & Training (First 90 Days)

Purpose

Goal: bring new hires to full productivity in 90 days with a clear 30/60/90 path
How: teach only role-critical skills, practice weekly, and certify on stage-based evidence (e.g., dated next step, active MAP, access to power).

Pro Tip

Reps forget 87% of training within 30 days without reinforcement. Use bite-sized, scenario-based learning to improve retention.

Source: Sales Enablement Pro, 2024

Inputs (what must exist before Day 1)

Bucket	Collateral	Owner
Stage exits & CRM validations	Dated next step, active MAP, access to power; block stage moves without evidence	**RevOps + Enablement**
Role competency grid & 30/60/90	3–5 skills per role, how they're measured, mapped to a simple ramp	**Enablement**
Minimum onboarding assets	Discovery checklist, MAP template (auto-created at Qualification), objection guide, shadowing log	**Enablement**
Manager coaching kit	Weekly agenda, "what good looks like" examples	**Enablement + Sales Managers**
Ops Home	Single source of truth with links to stage map, onboarding plan, dashboards, change log	**Enablement**
Training calendar & cohort plan	Dates, facilitators, pilot teams, exec sponsor	**Enablement + Sales Leadership**
Conversation Intelligence basics	Auto-record/transcribe + CRM sync enabled for new hires with tools such as Weflow	**Enablement + RevOps**

First 30 days

Focus:
Understand company, market, ICP, product, and sales methodology

Tactics:
- Welcome email + tech access checklist
- Enablement LMS onboarding path (15–30 min/day)
- Live sessions: GTM strategy, mission, team intros
- Call shadowing: top reps (min 5 calls/week)
- Product deep-dives (Product Marketing & SEs)
- Sales process walkthrough (CRM, tools, stages)
- Messaging & ICP breakdown
- Culture and tools overview (Gong, Weflow, Slack, Notion, CRM)

Deliverables:
- Product knowledge quiz (≥85% pass)
- Complete persona/messaging worksheet
- Observe 10+ sales calls
- "Pitch-back" product value prop (live or recorded)

Metrics:
- LMS module completion (100%)
- Ramp NPS (feedback on onboarding)
- Time to first activity (e.g., booked meeting or outreach)

Day 31–60

Focus:
Begin controlled execution: demos, outbounding, discovery, objection handling

Tactics:
- Role-plays: discovery, demo, objection handling
- Peer feedback and coaching circles
- "Deal Dissection" workshops (analyzing past wins/losses)
- Use battlecards, qualification frameworks (MEDDIC, SPICED)
- Access to guided selling tools (Seismic, Highspot, etc.)
- Outbound messaging sequences using Outreach/Salesloft

Deliverables:
- Discovery & Demo Certifications
- Live outbound activity (5–10 meetings set for SDRs)
- Deliver a recorded mock call using Weflow or Gong
- Complete qualification scorecard on real opportunities

Metrics:
- Certification scores
- Number of role-plays completed
- First discovery call or first opp created
- Deal notes logged accurately in CRM

Days 61–90

Focus:
Full-cycle sales execution with active coaching and milestone targets

Tactics:
- Own pipeline (set, advance, close deals)
- Live call coaching with manager
- Weekly 1:1 with enablement and team lead
- Deal strategy sessions using Mutual Action Plans
- Peer-to-peer "war room" objection battlecards
- Introduce quota pacing dashboards & forecasting

Deliverables:
- Run full discovery + demo + proposal
- Add at least 3 qualified opportunities
- Submit a win/loss self-review
- Complete 30/60/90 ramp survey and feedback loop

Metrics:
- 1st opp created and advanced
- 1st closed-won deal
- Pipeline coverage: 2–3x quota by Day 90
- CRM hygiene audit score: ≥90%

Post Onboarding

Purpose

Goal: keep reps improving after ramp so conversion rises, cycles shorten, forecasts stay clean, and next-quarter coverage strengthens

How: ship small behavior-led releases (one change at a time) and run weekly in-CRM coaching with CI-backed inspection - using the same evidence gates (dated next step, active MAP, multithreading/ access to power) - with fresh, findable assets and a simple change log in Ops Home

Inputs (what must exist post onboarding)

Bucket	Collateral	Owner
Competencies & Certifications	Advanced role rubrics tied to the same stage exits as onboarding with clear pass/fail on real deals.	**Enablement**
Content & asset backlog	Battlecards, talk tracks, demo storyline, objection guide, MAP template - each with a DRI, review date, and sunset rule.	**Enablement**
Manager coaching kit v2	30-min pipeline agenda, inspection checklist, call-scoring rubric, and 10 "watch-this-call" example clips.	**Enablement + Sales Managers**
CI playlists, templates & signals	Role/use-case playlists (discovery/demo/objection), summary templates that propose CRM updates, and pipeline signals (no next step, single-threaded, inactivity).	**Enablement + RevOps**
Play activation pack	One-pager per play: ICP, trigger, talk track, steps, proof assets, success criteria + tagging/measurement plan.	**Enablement**
Ops Home & change log	Central hub section for playbook v1.1, assets, playlists, calendar; weekly "what changed & why" note.	**Enablement**

1–2 quarters post ramp

Focus
Standardize how we sell and coach using the same evidence gates from onboarding

Tactics
- Ship Playbook v1.1: tighten stage language, add discovery checklist + MAP starter
- Run weekly pipeline review (30 min in CRM) and 2 call-coaching sessions/rep using a simple rubric
- Enable CI signals in pipeline views: no next step, single-threaded
- Push microlearning nudges: one short tip tied to a single exit
- Refresh top 5 assets: battlecards, talk track, demo storyline, objection guide, MAP template

Deliverables
- Playbook v1.1 (PDF + Ops Home links)
- CI playlists + pipeline signals live
- Updated asset pack (5 items) with DRIs and review dates

Metrics
- Adoption: % opps with dated Next Step; % opps with MAP at Qualification; playlist views/rep; % of key fields populated at stage exit
- Coaching: manager coaching coverage; improvement at the weakest stage (scorecard)
- Quality: stage→stage conversion trend on refreshed plays

Ongoing quarters

Focus
Turn standardization into growth with small, visible releases that improve conversion, cycle time, and coverage

Tactics
- Play activation cycles (quarterly), pick 1–2 plays (segment/trigger), bundle assets, run 4-week activation and tag deals.
- Advanced certifications: live deal review + role-play on multithreading, approval path, negotiation.
- Win/Loss updates with monthly synthesis
- Vertical/segment packs: tailor value drivers, proof, and example clips
- Expansion/Renewal track: success plan template, QBR checklist, exec-sponsor play

Deliverables
- Play pack(s) with tagging + measurement plan
- Advanced cert rubrics + schedule
- Monthly "what changed" note + example clips
- Vertical packs (one-pagers + demo storyline)
- Expansion/renewal toolkit (success plan + QBR checklist)

Metrics
- Next-Q pipeline - New Logo 3–4×, Expansion 1.5–2×
- Win rate by segment (SMB 20–30%, MM 25–35%, ENT 20–30%
- Declining slip rate (>2 moves), fewer idle-stage days

Tips & Tactics

The 5-stage continuous learning cycle

Stage	Description	Tactical Activities
1. Train	Deliver foundational and advanced knowledge	LMS modules, product updates, sales methodology
2. Certify	Validate understanding and readiness	Demo certifications, pitch assessments, quizzes
3. Apply	Use new skills in real-world scenarios	Live calls, role-plays, outbound messaging
4. Review	Analyze rep performance and feedback	Call scoring, deal reviews, manager coaching
5. Reinforce	Deliver timely micro-learning and feedback	Just-in-time content, nudges, flashcards, recertification

Tactics that work

Tactic	Description	Why It Works
Watch This Call" of the Week	Curated best/worst call with commentary	Drives peer learning
Just-in-Time Content Delivery	Content triggered by CRM stage or deal type	Relevance = impact
Sales Leaderboards	Highlight rep learning, certifications	Builds culture + accountability
Objection War Rooms	Weekly battlecard updates based on live objections	Keeps playbooks fresh
Learning Nudges	Daily/weekly quiz or call snippets in Slack	10x engagement over LMS

"Onboarding is not a training event - it's a behavioural transformation process. The faster you align reps to buyer conversations, the faster they sell."

Tamara Schenk,
Author & Former Research Director at CSO Insights

AI and Conversational Intelligence (CI) for Rep training

FREE Conversational Intelligence and AI Cheat Sheet

Conversational Intelligence 101

Definition

Conversation Intelligence (CI) is the use of AI and machine learning to analyze, transcribe, and extract insights from customer-facing calls - especially sales, success, and support conversations.

Core Purpose:
- Improve sales performance
- Improve sales productivity
- Capture market and buyer intelligence
- Optimize rep coaching
- Create cross-functional visibility

Impact

Impact Area	Stat	Source
Win Rates	20–25% increase in win rates using conversation intelligence tools	Gong Labs, 2023
Sales Cycle Length	53% shorter sales cycles with insights from conversation intelligence	Forrester Consulting, 2022
Quota Attainment	Reps are 35% more likely to hit quota with AI-driven coaching	Gartner, 2023
Ramp Time	3x faster ramp time for new reps using call libraries and best practices	Gong Customer Benchmark Report
Forecast Accuracy	28% increase	Sales Hacker & Chorus Report, 2022

Operational Tips

Maximize your recording ratio

You want to build your data layer first. More call data = better cross-call insights. Track the ratio of recorded vs. total meetings - then push it up as high as possible. There are no excuses for reps not to record most sales meetings

Single-call AI workflows

This is the productivity layer. Let AI summarize meetings, generate follow-up emails, and automatically update Salesforce fields. This way, reps focus on selling. Implementing this is your first strategic lever for driving sales productivity

Single-call insights & coaching

Your managers should use AI insights to coach reps based on single calls. For eg. *Did the rep follow our playbook? How did the rep handle objections? What are risks based on what the prospect said?*

AI helps to surface this to managers automatically

Cross-call analytics

Once you have enough volume, analyze trends across calls:

- Set up topics and trackers
- Segment by territory, region, or motion
- Spot patterns: competitors, pricing, discovery quality

Aggregate & Operationalise

Aggregate insights for leadership like: What objections slow deals; Which competitors come up most; How messaging performs across segments

Close the loop. Turn those insights into sharper playbooks for Enablement. Create clips and playlists and use them for onboarding, training, and ongoing coaching

Use Cases

Team	Use Cases
Sales	- Identify top-performer behaviors - Spot at-risk deals based on call patterns - Surface competitor mentions - Shorten ramp time for new reps - Automate post-meeting workflows (e.g., CRM updates)
Customer Success	- Track churn signals - Understand product pain points - Share VoC insights with product/engineering
Product & Marketing	- Mine messaging that resonates with buyers - Identify product gaps or feature requests - Capture buyer objections to refine positioning
RevOps	- Ensure CRM accuracy via automatic call-to-field mapping - Standardize playbooks and sales process adherence - Enable performance benchmarking at scale

Capabilities

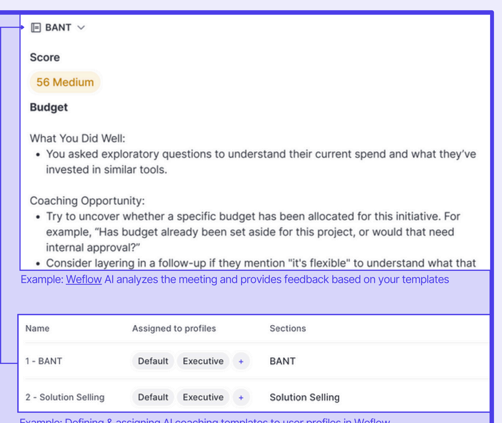
Capability	Description
Call Recording & Transcription	Automatically record and transcribe meetings across platforms (Zoom, Teams, etc.)
Speaker Identification	Distinguish speakers in calls to enable accurate analysis
AI Agents	AI Agents to summaries calls, update the CRM, or write follow up emails
Meeting Activity Insights	Automatically detect meetings held, follow up rate, time to first touch & more
AI-Powered Insights & Topic Tracking	Detect topics, keywords, objections, competitor mentions, and buying signals
Coaching & Feedback Workflows	Annotate, share snippets, assign training
CRM Integration	(Auto-)sync with Salesforce/HubSpot for complete data alignment
Compliance Features	Manage recording disclosures and data privacy (GDPR, CCPA)

Must-have capabilities for Enablement & Training

AI Coaching

How it works
AI analyzes the meeting and provides feedback along sales methodologies

Key capabilities to look for:
- Creating multiple custom AI coaching templates by team, role, etc.
- Prompt library so you can quickly choose from pre-built & custom prompts
- Assigning templates to user profiles
- Score each meeting to compare and track improvements over time



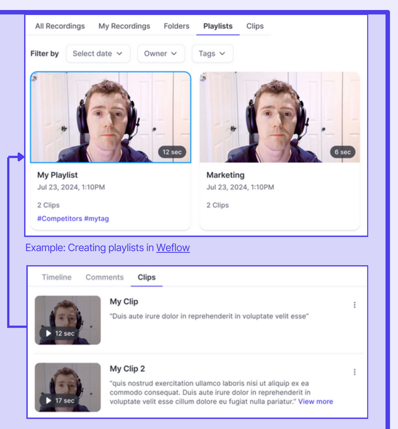
Example: Weflow AI analyzes the meeting and provides feedback based on your templates

Example: Defining & assigning AI coaching templates to user profiles in Weflow

Clips & Playlists

How it works
Clip videos and build playlists that you can group by onboarding, refreshers, or pre-cert practice

Key capabilities to look for:
- Clip videos
- Save clips in playbooks
- Create multiple playbooks for different use cases (onboarding, discovery, demo, objections, etc.)
- Assign tags to clips, recordings, and playlists to quickly filter
- Filter by date, owner, and tags



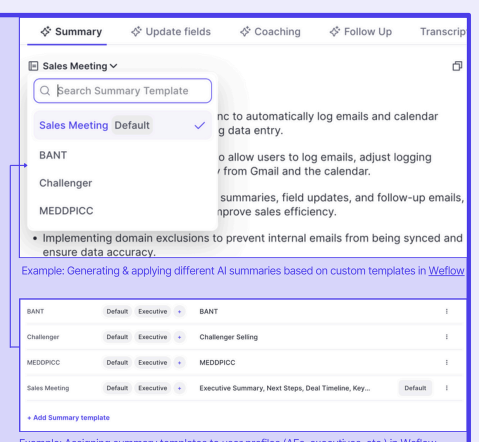
Example: Creating playlists in Weflow

Example: Clips in Weflow

AI Summary

How it works
AI generates a summary of the meeting and automatically stores those summaries in the CRM so enablement can review real deals without hunting reps

Key capabilities to look for:
- Custom AI summary templates so you can fine-tune AI summaries yourself
- Combine multiple prompts per template
- Assigning templates to user profiles (e.g., MEDDIC for AEs; account health for CS)
- Combine multiple prompts per template
- Customize prompts for meeting use cases
- Notes are stored in the event object



Example: Generating & applying different AI summaries based on custom templates in Weflow

Example: Assigning summary templates to user profiles (AEs, executives, etc.) in Weflow

AI Field Updates

How it works
After each call, AI suggests Salesforce field updates (e.g., Next Step, Contact Roles, etc.); the rep or manager approves with one click, avoiding admin work for reps.

Key capabilities to look for:
- Prompt library aligned to methodology & stage exits
- Human-in-the-loop compare/approve with event change log
- Supports all objects/field types
- Role-based templates (SDR/AE/AM/CSM)
- De-dupe with activity capture/CI to avoid double logging

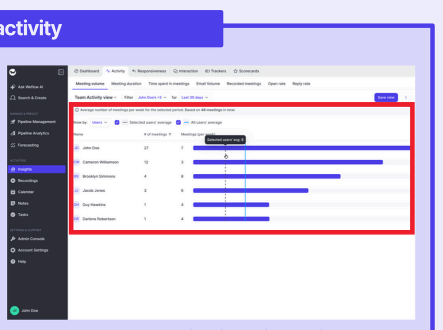
Example: Weflow suggests field updates based on the AI field update template below. End users can make changes and confirm the field updates with 1 click.

Example: Prompts for the AI field update template using Weflow's library (100+ pre-built prompts)

Metrics & Benchmarks

Meeting activity

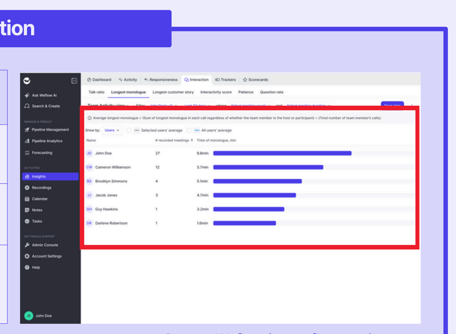
Metric	Rep's Score (exemplary)	Benchmark	Assessment
Meetings Held	9 / week	10 / week	On target
Follow-Up Rate	68%	≥ 80% of opps with follow-up	Inconsistent – follow-up discipline needed
Time to First Touch	3.2 hours	< 2 hours (for inbound leads)	Too slow – respond faster to new leads
Next Steps Logged	85% of calls	≥ 90% of calls	Improve documentation in CRM (e.g., automatic updates)



Source: Weflow (getweflow.com)

Interaction

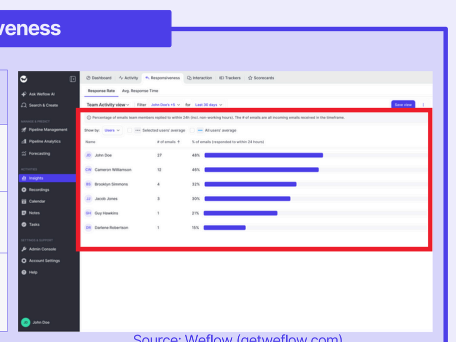
Metric	Rep's Score (exemplary)	Benchmark	Assessment
Question Rate	14/hour	Target: 18–25/hour	Needs improvement
Interactivity (Switches)	3.8 per 5 min	Target: ≥ 5 per 5 min	Increase engagement
Talk-to-Listen Ratio	65% Rep / 35% Buyer	Ideal: 40–50% Rep	Rep talks too much (encourage more listening)



Source: Weflow (getweflow.com)

Responsiveness

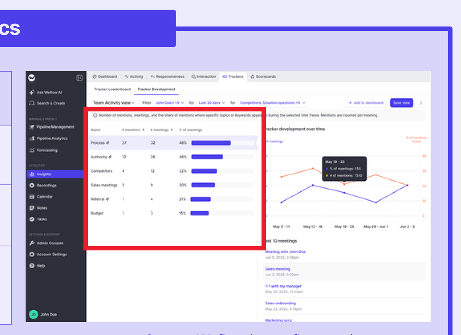
Metric	Rep's Score (exemplary)	Benchmark	Assessment
Talk Ratio	55% Rep / 45% Buyer	Ideal: 40–50% Rep	Rep talks too much (encourage more listening)
Longest Monologue	3 min 10 sec	Ideal: < 2 min 30 sec	Reduce long talk bursts
Question Rate	14/hour	Target: 18–25/hour	Needs improvement



Source: Weflow (getweflow.com)

Topics

Metric	Rep's Score (exemplary)	Benchmark	Assessment
Next Steps Mentioned	92% of calls	Goal: ≥ 90%	Well done
Objection Handling	5.2 avg per call	No set benchmark	Actively handled
Competitor Mentioned	12% of calls	Track only (contextual)	For coaching awareness



Source: Weflow (getweflow.com)