



REILLY

S A L E S C O N S U L T I N G

SALES ENABLEMENT SERIES

SALES RESOURCE CHECKLIST

Sales Resources Checklist

A comprehensive Sales Enablement program encompasses three key areas: Sales Operations, Skills Development, and Sales Resources. The checklist below can be used to assess the current state of your Sales Resources and any gaps that exist.

Once you have completed this checklist you can [download the Sales Enablement Handbook](#) to begin creating a comprehensive Sales Enablement program.

Templates

Exists Updated

<input type="checkbox"/>	<input type="checkbox"/>	Social Outreach
<input type="checkbox"/>	<input type="checkbox"/>	Email Outreach
<input type="checkbox"/>	<input type="checkbox"/>	Proposal
<input type="checkbox"/>	<input type="checkbox"/>	Client Account Reviews
<input type="checkbox"/>	<input type="checkbox"/>	Presentation
<input type="checkbox"/>	<input type="checkbox"/>	Demo
<input type="checkbox"/>	<input type="checkbox"/>	RFP Response
<input type="checkbox"/>	<input type="checkbox"/>	Prospect Profiling
<input type="checkbox"/>	<input type="checkbox"/>	Target Account Profiling
<input type="checkbox"/>	<input type="checkbox"/>	Account Influence Mapping
<input type="checkbox"/>	<input type="checkbox"/>	Account Whitespacing
<input type="checkbox"/>	<input type="checkbox"/>	Account Strategy
<input type="checkbox"/>	<input type="checkbox"/>	ROI Calculators

Sales Resources Checklist

Playbooks

Exists Updated

<input type="checkbox"/>	<input type="checkbox"/>	Prospecting
<input type="checkbox"/>	<input type="checkbox"/>	Sales Cycle
<input type="checkbox"/>	<input type="checkbox"/>	Discovery
<input type="checkbox"/>	<input type="checkbox"/>	Client Reviews
<input type="checkbox"/>	<input type="checkbox"/>	Demo
<input type="checkbox"/>	<input type="checkbox"/>	Proposal Presentation

Knowledge Libraries

Exists Updated

<input type="checkbox"/>	<input type="checkbox"/>	Competitive Information
<input type="checkbox"/>	<input type="checkbox"/>	Case Studies (External)
<input type="checkbox"/>	<input type="checkbox"/>	Case Studies (Internal)
<input type="checkbox"/>	<input type="checkbox"/>	References
<input type="checkbox"/>	<input type="checkbox"/>	Name Drops
<input type="checkbox"/>	<input type="checkbox"/>	Vertical Industry Information & Terminology
<input type="checkbox"/>	<input type="checkbox"/>	Target Department Information & Terminology
<input type="checkbox"/>	<input type="checkbox"/>	Campaign Strategies & Resources
<input type="checkbox"/>	<input type="checkbox"/>	Product / Solution Training Videos
<input type="checkbox"/>	<input type="checkbox"/>	Sales Process / Cycle Training Videos
<input type="checkbox"/>	<input type="checkbox"/>	Client Facing Collateral
<input type="checkbox"/>	<input type="checkbox"/>	Competitive Differentiation Videos

Sales Resources Checklist

CRM

Exists Updated

<input type="checkbox"/>	<input type="checkbox"/>	Current Target Account Data Sets
<input type="checkbox"/>	<input type="checkbox"/>	Deduped Accounts & Contacts
<input type="checkbox"/>	<input type="checkbox"/>	Top Target Accounts Reports / Dashboards
<input type="checkbox"/>	<input type="checkbox"/>	Top Vertical Reports / Dashboards
<input type="checkbox"/>	<input type="checkbox"/>	Target Department Reports / Dashboards
<input type="checkbox"/>	<input type="checkbox"/>	Minimum 12 Month Pipeline vs Target Report / Dashboard

Other Resources

Exists Updated

<input type="checkbox"/>	<input type="checkbox"/>	Leader Boards
<input type="checkbox"/>	<input type="checkbox"/>	Negotiation Matrix
<input type="checkbox"/>	<input type="checkbox"/>	Competitive Matrix
<input type="checkbox"/>	<input type="checkbox"/>	Filterable Case Study / Name Drop / Reference Index
