

Enablement Charter Checklist



Build your enablement charter

An Enablement charter serves as your business plan and strategic roadmap for the year. It ensures that Enablement becomes a mission-critical part of your organization rather than the “fire department” that takes care of everything and everybody.

Use the below checklist to ensure you identified all important components that should be covered in your charter when developing it for the very first time.

The checklist

Read through the below list before building your charter to make sure you include all relevant components.

Goals

	Define your business goals which are the overarching goals of the business as a whole.
	Define your sales goals which are the specific goals of the Sales organization.
	Define your Sales Enablement goals which are organizational goals that will help you meet the business and sales goals.

Mission

	Create a succinct mission statement for your Sales Enablement organization.
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Metrics

	Establish sales metrics that prove the success of your enablement function and programs based on achieving measurable business results and revenue performance.
	Establish program metrics that reflect the participation and adoption of your sales enablement programs.
	Establish ROI targets for program and technology investments.

Audience, Stakeholders, & Sponsors

	Specify the primary audience for Sales Enablement, i.e. who you serve.
	List other stakeholders who have a vested interest in the program.
	Name your executive sponsor. It is critical to have an executive champion for the Sales Enablement program.

Capabilities & Services

	List the Sales Enablement services your team will own, provide, and manage.
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Charters are a team effort

If you have a great Enablement team around you, make sure you are building your charter together with the team leader providing **guidance and advice** as you move through the activity.

Building a charter for the first time takes a little effort, so don't rush it. Block a **couple of days** with your team to discuss the charter layout as well as its components and then break up into teams to tackle each section over **the course of weeks**.

Once your charter is finalized, it is absolutely critical that you communicate it to the executive team, different business teams, the audience you serve and of course, the rest of the organization. Understand each audience and determine **who needs to know what and how much detail**. Tailor your communication plan accordingly.

A clear and concise Enablement charter will entirely change the way you define Enablement for your organization!

Want step-by-step guidance on how to create a charter?
See our eBook [Power Sales Enablement with a Charter](#) →

