

Sales enablement plan template

A sales enablement plan template is a one-year plan for the enablement function: the revenue goals it serves, the few outcomes it commits to, the programmes scored and ranked before they are scheduled, a quarterly roadmap with owners and launch dates, and the OKRs and review rhythm that show whether the plan worked.

Last updated 2026-10-26. Online version: <https://www.revspire.io/resources/templates/sales-enablement-plan-template>

How to use this template

1. **Start from the revenue plan, not the request list:** Copy the company's targets into the plan on a page before looking at a single request. Every initiative will be scored against those goals, so they have to be fixed first.
2. **Write outcomes as changes in seller behaviour:** "Launch a new onboarding programme" is an activity. "New AEs run a certified discovery call by day 45" is an outcome. Three outcomes like that are enough for a year.
3. **Score every initiative before any of them gets a date:** List everything that has been asked for, score each against the goals, audience and effort, then rank. The roadmap is filled from the top of the ranking down, which makes the line below it a decision rather than an accident.
4. **Leave room in the second half of the year:** Launches, reorganisations and new hires arrive that nobody planned for. A roadmap with every quarter full has no answer when they do. Holding part of Q3 or Q4 open is part of the plan, not a gap in it.
5. **Put a baseline next to every key result:** A target without a starting point cannot be judged at year end. If the baseline is unknown, the first key result is to measure it, and the date for that goes on the roadmap.
6. **Write the "not doing" list and share it:** Requests that were declined with a reason stay declined. Requests that were simply left off come back every month. Agree the list with the sponsor and send it to the people who asked.

The template

Five blocks. The plan on a page comes first and should fit on one screen; the scoring, roadmap, OKRs and review cadence make it defensible. Fill them in order, because each block uses decisions made in the one before.

The plan on a page

Field	What to write	Your entry
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Planning period	The year or the four quarters this plan covers, and the date of the first quarterly review.	
Revenue goals served	The two or three company targets this plan supports, copied from the revenue plan rather than reworded.	
Audiences in scope	Each selling role, its current headcount and the hires expected this year.	
Top three outcomes	The changes in seller behaviour or results that would make this year a success, each one measurable.	
Budget and headcount	The enablement budget and team size the plan assumes. If either changes, the roadmap changes.	
Executive sponsor	The leader who agreed the outcomes and will hear the quarterly reviews.	
Not doing this year	The requests deliberately left out, with the reason, so they are declined once instead of every week.	

Initiatives scored before they are scheduled

Initiative	Revenue goal it serves	Audience	Behaviour change expected	Effort (S/M/L)	Rank
[Programme or project]	[Goal from the plan on a page]	[Role and headcount]	[What sellers will do differently]	[S, M or L]	[1 to n]
[Programme or project]	[Goal]	[Role]	[Behaviour change]	[S, M or L]	[Rank]
[Programme or project]	[Goal]	[Role]	[Behaviour change]	[S, M or L]	[Rank]

Quarterly roadmap

Quarter	Programme	Audience	Owner	Launch date	How we will know it landed
Q1	[Ranked initiative]	[Role]	[Name]	[Date]	[Leading indicator, measured 30 days after launch]
Q2	[Ranked initiative]	[Role]	[Name]	[Date]	[Leading indicator]
Q3	[Ranked initiative]	[Role]	[Name]	[Date]	[Leading indicator]
Q4	[Ranked initiative, or capacity held back for launches nobody has announced yet]	[Role]	[Name]	[Date]	[Leading indicator]

Objectives and key results

Objective	Key result	Baseline today	Target and date	Owner
[Outcome 1 from the plan on a page]	[Measurable result]	[Current value]	[Target, date]	[Name]
[Outcome 2]	[Measurable result]	[Current value]	[Target, date]	[Name]
[Outcome 3]	[Measurable result]	[Current value]	[Target, date]	[Name]

Review cadence

Rhythm	Meeting	Standing output
Monthly	Roadmap check with the enablement team	Programmes on track, at risk or slipped, with one line on why
Quarterly	Sponsor review	Key results against target, and any change to the next quarter's roadmap
Year end	Plan retrospective	Which outcomes moved, which programmes earned a second year, and what next year's plan inherits

A worked example

Example: fictional company. Harborview Metrics sells revenue analytics software through 85 sellers: 30 SDRs, 45 account executives and 10 account managers. It plans to hire 20 more account executives next year and to launch a second product mid-year. Tomasz Byrne runs enablement with one colleague. This is the plan he agreed with the CRO in November.

Harborview Metrics: the plan on a page

Field	What was written
Planning period	January to December, first quarterly review in the second week of April.
Revenue goals served	Grow new business bookings with a larger AE team; attach the second product to existing accounts from Q3.
Audiences in scope	45 AEs plus 20 hires, 30 SDRs, 10 account managers. Partners are out of scope this year.
Top three outcomes	New AEs reach their first closed deal faster; every AE can run a credible discovery call on the second product by launch; reps find approved content without asking a colleague.
Budget and headcount	Two people and the current tool budget. A third hire is requested for Q3 and is not assumed.
Executive sponsor	The CRO, monthly for thirty minutes, quarterly review in writing.
Not doing this year	A full SDR certification rebuild (current one works well enough); a partner portal (no partner programme yet); an internal podcast (asked for twice, no outcome attached).

The roadmap after ranking

Quarter	Programme	Owner	How it will be judged
Q1	Rebuilt AE onboarding with certification gates, ready for the first hiring class	Tomasz	Share of new AEs passing the discovery certification by day 45
Q2	Content library clean-up: retire stale decks, tag the rest by stage and persona	Colleague	Searches that end in an opened, approved asset
Q3	Second-product launch kit: pitch, discovery guide, role-play scenarios, battlecard	Tomasz with product marketing	Share of AEs certified on the new discovery call before launch week
Q4	Half the quarter held back for whatever the launch teaches; coaching rhythm for account managers	Both	Account managers with an active coaching record

Example: fictional company. Ferncastle Analytics, Harborview Metrics, Marlow & Finch Logistics and every person named in this example are invented for illustration. Any resemblance to real companies or people is coincidental.

Common mistakes

- **A roadmap with twelve programmes for a team of two:** Every programme needs building, launching and reinforcing. Plans that ignore the reinforcing half launch everything and land nothing. Fewer programmes, carried through, beat a full calendar.
- **Measuring sessions instead of change:** Courses completed and assets published describe effort. Key results should describe what sellers do differently or what moved in the pipeline, measured against a baseline.
- **A plan written without the sponsor:** If the CRO first sees the plan in January, its outcomes are enablement's wish list. Agreeing the three outcomes with the sponsor before the roadmap is built is what makes them commitments.
- **No link from programmes to revenue goals:** An initiative that cannot name the goal it serves is the first one cut when budgets tighten. The scoring block makes the link explicit before anything is scheduled.
- **Never revisiting the plan:** A plan that is only read at year end describes the year that was expected, not the one that happened. The quarterly review is where the roadmap is allowed to change, with a reason written down.
- **Confusing the plan with the charter:** The plan changes every year; the charter should not. Teams that rewrite their remit in every annual plan never build a stable function, and their neighbours never learn what to expect from them.