

Sales enablement survey template

A sales enablement survey template is a ready-made questionnaire that asks reps, managers, marketing and RevOps where selling is harder than it should be: finding content, training, tools, coaching and buyer-facing materials. Each question has a type and an audience, and a scoring sheet turns the answers into priorities for the enablement plan.

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

How to use this template

1. **Decide what the survey is for:** Write the one decision the results will inform, such as next year's enablement priorities. Every question that does not feed that decision comes out.
2. **Pick questions from the bank, not all of them:** Choose 20 to 25 for reps and 10 to 15 for managers, marketing and RevOps, covering every theme. Keep at least three agreement questions per theme so the theme average means something, and no more than four open questions per audience.
3. **Ask the profile questions first:** Role, region, tenure and segment are what make the results usable. Promise anonymity, and report only groups of five or more so nobody can be identified.
4. **Get the sales leader to send the reminder:** A reminder from enablement is easy to ignore. A short note from the sales leader saying the results will shape next year is usually what lifts the response rate.
5. **Score, then cut, then read the open answers:** Fill in the scoring sheet, rank the themes, then cut the lowest two by role, region and tenure. Read the open answers last, for the lowest themes, to understand why rather than to count.
6. **Turn findings into the plan and tell people:** Move the top two or three findings into the results-to-plan sheet with an owner, a measure and a resurvey date, then carry them into the enablement plan and budget. Share the findings and the changes with everyone who was invited, within a month.

The template

A survey header, a question bank in six themes, and three sheets for the results: a scoring sheet, a segment cut and a results-to-plan sheet. Pick 20 to 25 questions for reps and 10 to 15 for each other audience. Agreement questions use the same 1 to 5 scale throughout (1 strongly disagree, 5 strongly agree), so themes can be averaged and compared. In the Excel version the scoring sheet is where averages and the share answering 4 or 5 go.

Survey header

Field	What to write	Your entry
Purpose	One sentence sellers will read first, such as: help us decide what enablement works on next year.	
Audiences and invite list	Reps (by role: SDR, AE, account manager), sales managers, marketing and RevOps. Invite everyone in each group rather than a sample.	
Survey window	Open for 10 working days, with one reminder from enablement and one from the sales leader.	
Anonymity	Anonymous, with results reported only for groups of five or more people.	
Profile questions	Role, region, tenure band (under 6 months, 6 to 18 months, over 18 months) and segment, asked at the start so every answer can be cut.	
Scale	1 strongly disagree, 2 disagree, 3 neither, 4 agree, 5 strongly agree. No reverse-worded items.	
Owner and promise back	Who analyses the results, and the date respondents hear what was found and what will change.	

Theme 1: Content findability and quality

#	Question	Type	Audience	A low score points to
C1	I can find the content I need for a deal in under two minutes.	Likert (1-5)	Reps, managers	Search, tagging or too many places to look
C2	I trust that the content I find is the current, approved version.	Likert (1-5)	Reps, managers	Versions and duplicates; no owner per asset
C3	There is content for each stage of the deals I work on.	Likert (1-5)	Reps	Gaps by stage; run the content audit
C4	Which content do you most often build yourself because you cannot find it? Choose up to three.	Multiple choice	Reps	The assets to create or make findable first
C5	I know which content marketing has produced in the last quarter.	Likert (1-5)	Reps, managers	Launch communication, not the content itself
C6	Which content requests from sales take longest to fulfil, and why?	Open	Marketing	Request intake and prioritisation

Theme 2: Training and onboarding

#	Question	Type	Audience	A low score points to
T1	My onboarding prepared me to run my first customer meetings on my own.	Likert (1-5)	Reps under 18 months	Onboarding content or gates; check the onboarding plan
T2	Training I received this year changed how I sell.	Likert (1-5)	Reps	Training that informs but is not practised
T3	I had the chance to practise new messaging before using it with buyers.	Likert (1-5)	Reps	No role-play or certification step
T4	How would you prefer to learn a new product release?	Multiple choice: live session, short video, written brief, role-play, peer example	Reps	The format to use for launches
T5	New hires on my team are ready to sell on their own when onboarding ends.	Likert (1-5)	Managers	A gap between onboarding exit and real readiness
T6	Which skill or topic would most help your results next quarter?	Open	Reps, managers	Candidates for the skills assessment

Theme 3: Tools and tech stack

#	Question	Type	Audience	A low score points to
S1	The sales tools I use work together without copying information between them.	Likert (1-5)	Reps, RevOps	Integration gaps
S2	I know which tool to use for each step of a deal.	Likert (1-5)	Reps	Overlapping tools or missing guidance
S3	Updating the CRM takes a reasonable amount of my week.	Likert (1-5)	Reps	Required fields and admin load
S4	Which tools do you use at least weekly? Tick all that apply.	Multiple choice	Reps	Licences paid for but not used
S5	Which tool request from sales should be the priority next year, and why?	Open	RevOps	Where the stack and the requests disagree

Theme 4: Coaching

#	Question	Type	Audience	A low score points to
K1	My manager coaches me on a specific skill at least once a month.	Likert (1-5)	Reps	Coaching cadence
K2	Coaching I receive is based on evidence, such as a call recording or a scored role-play.	Likert (1-5)	Reps	Opinion-based coaching; no rubric
K3	I have the time and tools to coach each rep every month.	Likert (1-5)	Managers	Manager capacity or missing call and practice data
K4	I know what good looks like for each skill I coach.	Likert (1-5)	Managers	No competency framework or behaviour anchors
K5	What would make coaching more useful to you?	Open	Reps, managers	The change to the coaching programme

Theme 5: Buyer-facing materials

#	Question	Type	Audience	A low score points to
B1	Our pitch and demo materials reflect the problems buyers describe to me.	Likert (1-5)	Reps	Messaging written from the product, not the buyer
B2	I have proof (case studies, references, numbers) for the industries I sell to.	Likert (1-5)	Reps	Proof gaps by industry
B3	I can give a buyer's other stakeholders material they can use without me in the room.	Likert (1-5)	Reps	Champion and buying-group materials
B4	Which buyer question do you most often struggle to answer with existing material?	Open	Reps	The next asset or battlecard to write
B5	Sales gives useful feedback on which materials buyers respond to.	Likert (1-5)	Marketing	No loop from deals back to marketing

Theme 6: Enablement team service and priorities

#	Question	Type	Audience	A low score points to
E1	I know who to ask in	Likert (1-5)	Reps, managers	Visibility of the enablement

	enablement for help with a deal, content or training.			team
E2	Enablement works on the problems that matter most to my results.	Likert (1-5)	Reps, managers	Priorities set without the field
E3	If enablement could fix one thing next quarter, what should it be?	Open	All audiences	The headline priority, in respondents' words
E4	Rank these areas by how much improvement would help your results: content, training, tools, coaching, buyer materials.	Multiple choice (ranking)	Reps, managers	Checks the theme scores against stated priority
E5	Enablement and my team agree on how success is measured.	Likert (1-5)	Managers, marketing, RevOps	No shared metrics; see the enablement dashboard

Scoring sheet

Theme	Questions scored	Average (1-5)	Share answering 4 or 5	Reps average	Managers average	Change since last survey	Rank
Content findability and quality	C1, C2, C3, C5	[]	[]	[]	[]	[]	[]
Training and onboarding	T1, T2, T3, T5	[]	[]	[]	[]	[]	[]
Tools and tech stack	S1, S2, S3	[]	[]	[]	[]	[]	[]
Coaching	K1, K2, K3, K4	[]	[]	[]	[]	[]	[]
Buyer-facing materials	B1, B2, B3, B5	[]	[]	[]	[]	[]	[]
Enablement team service	E1, E2, E5	[]	[]	[]	[]	[]	[]
How to score	Agreement questions only	Mean of all answers to the listed questions	Answers of 4 or 5, divided by all answers	Same, reps only	Same, managers only	This average minus the last one	1 = lowest average

Segment cut

Cut by	Bands	Minimum group size	What to look for
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Role	SDR, AE, account manager, sales manager, marketing, RevOps	5	Managers scoring a theme higher than their reps: the problem is invisible from above
Region	Each sales region or country	5	One region low on tools or content: often a language, time zone or local process gap
Tenure	Under 6 months, 6 to 18 months, over 18 months	5	New hires low on content and training: onboarding; veterans low on tools: change fatigue
Segment	SMB, mid-market, enterprise	5	Enterprise sellers low on buyer-facing materials: buying-group content is missing
Manager team	Each first-line manager's team	5	One team low on coaching: a manager conversation, not a programme

Results to plan

Finding	Evidence	Initiative in the enablement plan	Owner	Measure of success	Resurvey date
[Lowest-ranked theme]	[Average, share agreeing, segment where it is worst, two quoted open answers]	[The programme that addresses it]	[Name]	[The question score to move, plus one behaviour or usage measure]	[Date]
[Second-lowest theme]	[]	[]	[]	[]	[]
[Biggest segment gap]	[]	[]	[]	[]	[]
[Not doing this year]	[A finding you will not act on yet]	[Why, and when it will be revisited]	[Name]	n/a	[Date]

A worked example

Example: fictional company. Harborview Metrics sells analytics software to retail and logistics companies through 64 sellers and 8 sales managers. Rowan Pike, the new head of enablement, sent the survey in September before writing next year's plan. 52 sellers and all 8 managers answered. All names and figures are invented for illustration and are not benchmarks.

Harborview Metrics: scoring sheet extract

Theme	Average (1-5)	Reps average	Managers average	Rank
Content findability and quality	2.6	2.5	3.3	1
Coaching	2.9	2.8	3.8	2
Tools and tech stack	3.1	3.0	3.4	3
Training and onboarding	3.4	3.4	3.6	4
Enablement team service	3.5	3.5	3.6	5
Buyer-facing materials	3.6	3.6	3.7	6

What the segment cut showed

Cut	Finding	What Rowan concluded
Tenure	Content findability: 2.0 for sellers under 6 months, 2.9 for those over 18 months	Veterans know where things are; new hires do not. Fix search and onboarding to content first
Role	Coaching: reps 2.8, managers 3.8; managers also scored K3 (time to coach) at 2.4	Managers believe they coach and have no time to do it well. A manager capacity problem, not a rep one
Region	Tools: 2.4 in the Nordics, 3.2 elsewhere; open answers named CRM fields that do not fit local deals	A RevOps fix for one region, not a tools programme for everyone

Results to plan

Finding	Initiative	Owner	Measure of success	Resurvey
New hires cannot find content	One governed library; a content-finding task in week 1 of onboarding; a content audit of the top 100 assets	Rowan Pike	Content theme average for sellers under 6 months from 2.0 to 3.5	March
Managers lack time to coach	A monthly coaching slot per rep with a single focus, using scored role-plays as evidence	Sales director	K1 and K3 above 3.5	March
Nordic CRM fields do not fit	RevOps review of required fields for the region	RevOps lead	S3 for the Nordics above 3.2	March

Not doing this year	A new buyer-facing pitch deck: highest-scoring theme, revisit in a year	Rowan Pike	n/a	Next September
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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

- **Asking everything:** A 60-question survey gets abandoned halfway and the last themes have half the answers. Ten minutes is a sensible ceiling for reps.
- **Asking what people want instead of where it hurts:** "Would you like more training?" gets a yes. "Training this year changed how I sell" tells you whether the training worked.
- **Reading only the averages:** A middling average can hide a new-hire group that is struggling and a veteran group that is fine. Always cut the lowest themes by tenure and role.
- **Treating opinion as measurement:** A low coaching score says reps feel under-coached, not that their skills are weak. Check skills with an assessment and content with an audit before committing budget.
- **Changing the questions every year:** If the wording changes, the trend is lost. Keep the core agreement questions fixed and rotate only the open ones.
- **Never reporting back:** Sellers who answered and heard nothing will not answer next time. Share what was found and what changes, even when the answer is not this year.