90-day B2B Sales Enablement Launch Checklist

Use this week-by-week plan to stand up a modern enablement program that improves seller readiness, content effectiveness, and buyer engagement.

Quick-start goals

- 30 days: Baseline audit, strategy, and executive alignment complete
- 60 days: Core content, readiness, and engagement programs live with initial analytics
- 90 days: Optimization loop running, measurable impact on leading indicators

Week 1: Kickoff and alignment

- [ ] Appoint an executive sponsor and cross-functional tiger team (Sales, Marketing, CS, RevOps, Enablement, IT, Compliance)
- [ ] Define business outcomes and KPIs (e.g., ramp time, win rate, time-to-first-meeting, content adoption, call score improvements)
- [ ] Identify priority segments, products, and regions for the pilot
- [ ] Document current enablement pain points and "must-fix" issues
- [ ] Establish governance: decision rights, review cadence, and communication channels
- [ ] Draft project plan, risks, and success criteria

Week 2: Content and skills audit

- [ ] Inventory existing sales content by stage, persona, and region, flag outdated/duplicate assets
- [ ] Map content to buyer journey stages, identify gaps (discovery, evaluation, validation, procurement)
- [ ] Audit training assets, certifications, and manager coaching practices
- [ ] Assess conversation intelligence coverage and call score baselines
- [ ] Review compliance needs (MLR/legal review, regionalization, brand)
- [ ] Select 5–7 "hero" assets to feature in the pilot

Week 3: Data, tools, and integrations

- [ ] Validate CRM hygiene (stages, fields, owners) and reporting requirements
- [ ] Confirm integrations plan: CRM, email/calendar, file storage, meeting/calling tools, CMS/LMS
- [ ] Define content taxonomy and metadata (persona, industry, product, stage, language)
- [ ] Establish analytics definitions: what constitutes "content influenced," engagement, and readiness completion

- [ ] Choose enablement platform and owners, configure roles and permissions
- [ ] Draft enablement operating cadence (monthly content refresh, weekly coaching focus)

Week 4: Buyer journey and plays

- [ ] Finalize buyer journey by segment and buying committee roles
- [ ] Create 3–5 sales plays with clear triggers, messaging, assets, and next steps
- [ ] Build competitive battle cards and objection handling guides
- [ ] Draft mutual action plan template linked to stages and stakeholders
- [ ] Define Digital Sales Room (DSR) structure and naming conventions
- [ ] Prepare field-ready email and call templates for SDRs and AEs

Week 5: Content cleanup and governance

- [ ] Retire outdated assets, update top 20 assets with latest messaging and proofs
- [ ] Apply standardized metadata, version control, and approval workflows
- [ ] Produce 2–3 new gap-fill assets (e.g., ROI calculator, technical validation brief, industry one-pagers)
- [ ] Localize or region-lock content where needed, add alt text and accessibility checks
- [ ] Establish Content Council with monthly review agenda

Week 6: Readiness programs and manager enablement

- [ ] Create role-based learning paths (SDR, AE, SE, CSM, Partners)
- [ ] Launch microlearning modules and product/value messaging refreshers
- [ ] Set up role-play and certification rubrics, schedule manager-led practice
- [ ] Define call scorecard (discovery, value articulation, next steps, objection handling)
- [ ] Prepare "manager toolkit": coaching guidelines, reinforcement plan, 1:1 templates

Week 7: Buyer engagement rollout

- [ ] Stand up DSR templates per play/persona, include MAP, key assets, and meeting recaps
- [ ] Configure email sharing, tracking, and engagement alerts
- [ ] Train sellers on co-creation in DSRs and multi-threading tactics
- [ ] Establish rules for when to open a DSR, who to invite, and how to progress it
- [ ] Pilot live with one region or team, collect qualitative feedback

Week 8: AI and intelligence activation

- [ ] Enable AI search and content recommendations, validate results and guardrails
- [ ] Deploy conversation intelligence for discovery and late-stage calls, baseline metrics
- [ ] Launch Authoring AI for personalization (govern prompts, brand voice, disclaimers)

- ☐ Connect analytics: content performance, readiness completion, engagement signals
- ☐ Define “next best action” alerts for sellers and managers

Week 9: Measurement and attribution

- ☐ Publish KPI dashboard with leading indicators:
  - Content: adoption rate, findability, share-to-view ratio, DSR engagement
  - Readiness: course completion, certification pass rates, call scores
  - Engagement: time-to-first-meeting, meeting-to-opportunity conversion
- ☐ Set up lagging indicators tracking: win rate, deal velocity, ACV, ramp time
- ☐ Implement attribution model tying content/training to revenue outcomes
- ☐ Review baseline vs. Week 1 targets, identify quick wins and gaps

Week 10: Change management and communications

- ☐ Launch a field-wide update: what’s new, why it matters, how to access
- ☐ Host enablement office hours and “ask me anything” sessions
- ☐ Publish a monthly enablement newsletter with top content, wins, and tips
- ☐ Recognize early adopters, share call snippets and DSR examples
- ☐ Gather NPS/CSAT from sellers on content and training

Week 11: Optimization sprint

- ☐ Prune low-performing assets, improve titles, thumbnails, and summaries
- ☐ Strengthen two weakest sales plays based on usage and outcomes
- ☐ Tune AI recommendations with feedback and negative keywords
- ☐ Update role-based curricula from certification and call score data
- ☐ Refine DSR templates and MAP checklists to reduce buyer friction

Week 12: Scale and roadmap

- ☐ Decide scale plan: expand to additional regions/teams/partners
- ☐ Lock quarterly roadmap: new plays, assets, certifications, integrations
- ☐ Set recurring governance: Content Council, Coaching Council, KPI review
- ☐ Document lessons learned and standard operating procedures
- ☐ Present impact to executives and request next-phase investments

Compliance, security, and governance checklist

- ☐ Role-based access controls and regional content permissions
- ☐ MLR/legal review workflow with audit trail and expirations
- ☐ Watermarking/versioning for regulated or sensitive content

- [ ] Data retention and PII handling for call recordings and DSRs
- [ ] Vendor risk assessment and SOC/ISO documentation archived

Manager coaching checklist (weekly)

- [ ] Review two discovery and one late-stage call per rep
- [ ] Score with rubric, provide two strengths and two improvements
- [ ] Assign a microlearning and a practice scenario
- [ ] Validate next steps are in CRM and reflected in MAP/DSR
- [ ] Recognize best-in-class clips in team meeting

DSR and buyer engagement checklist

- [ ] Open a DSR after first qualified discovery
- [ ] Include: agenda, recap, tailored assets, MAP with dates/owners
- [ ] Add stakeholders as they surface, recap every meeting within 24 hours
- [ ] Track engagement, follow up on silent stakeholders proactively
- [ ] Close DSR with summary, decision rationale, and onboarding links

Content quality checklist

- [ ] Clear purpose and stage, persona and problem stated upfront
- [ ] Proof points with sources, unique POV, skimmable structure
- [ ] Accessibility: alt text, contrast, captions for video
- [ ] Localized variants as needed, consistent voice and branding
- [ ] Embedded CTAs and next steps for sellers and buyers

Analytics and KPI checklist

- [ ] Enable dashboards for:
    - Content: views, shares, influence on opps, win-rate delta
    - Readiness: time-to-certification, effectiveness by cohort
    - Engagement: DSR participation, MAP adherence, stakeholder coverage
- [ ] Set alert thresholds (e.g., no engagement 7 days post-share)
- [ ] Review weekly with sales managers, monthly with executives

30-60-90 success scorecard

- 30 days: Audit complete, plays defined, taxonomy/governance live, baseline KPIs captured
- 60 days: 70%+ sellers certified on core paths, DSRs used in 50%+ qualified opps, AI recs enabled

- 90 days: +10–20% improvement in time-to-first-meeting, +10% call score lift, measurable content influence on pipeline

Optional Bigtincan accelerators

- Readiness: Adaptive microlearning, RolePlayAI, CoachingAI for scalable feedback
- Content: Centralized library with version control, SearchAI, Content Personalization
- Engagement: Digital Sales Rooms with mutual action plans and analytics
- Intelligence: Conversation and Relationship Intelligence, unified analytics across content, training, and deals
- Integrations: 75+ OOTB connectors to CRM, productivity, and calling tools

Field-ready templates to include with this checklist

- Mutual Action Plan (MAP) template
- Sales play template (trigger, message, assets, next steps)
- Call scorecard and certification rubric
- DSR structure checklist and naming convention guide
- KPI dashboard starter schema
- AI prompt library for discovery, follow-up, and proposal personalization

How to use this checklist

- Print or import into your project tool and assign owners and due dates
- Review status weekly and unblock risks in exec standup
- Share quick wins and leading indicator improvements to build momentum

Need a head start? Get in touch with our team for expert guidance.