WORKSHOP :

How to Build a Sales Playbook

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As part of the 16th edition of Quebec Technology Association's Big Bang event, annual meet-up of businesses of the technology field, our Vice President of Sales Marc Trudel gave a workshop on the importance of a strategic sales guide within a company with growth objectives, and how to build it.

As this workshop received the second highest rating allotted by the participants of the event's working tables, Ubity decided to share its exclusive content!

BIGBANG AQT

let's begin!

SUMMARY

PRESENTATION

When businesses start up, things are often done by **intuition**. There's **no right answer** to any question, and there's **no best way** to do things. That is, until there is an aspiration to scale it up.

To achieve business growth, an organization needs **clear instructions**. There needs a way to **get the entire team in line** with the way in which things should be done. In other words, **process has to be established**.

VS

Starting up:

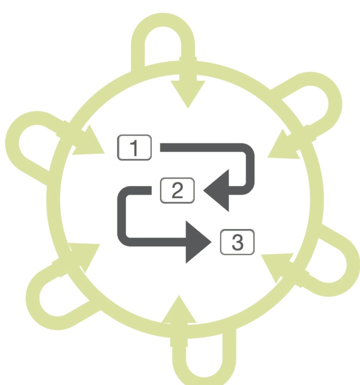
- ~ Intuition
- ~ No right answer
- ~ No best way

Scaling up:

- ✓ Clear instructions
- ✓ Get the entire team inline
- ✓ Establish process

Process is the lynchpin of **predictable, sustainable growth**. It's what **separates a business from just a group of people** who happen to work in the same office.

Every great business centres around a **core system of processes**. Let's take our favourite brand example of Apple, and imagine the connection they must have to scalable, repeatable process when designing, building, distributing and selling a new iPhone. Without clear processes to follow, it would be a nightmare!



Every great business centres around a **core system of processes**

Likewise, if a business is growing through an array of unrehearsed actions and decisions, these start to fall apart as it grows larger. Small gaps become chasms and inconsistency becomes chaos. If employees are operating from their own playbook, there's no way to deliver a **consistent product or experience**.

Achieving scale requires a level of **repeatable** and **predictable systems**. Refining and developing these systems is how companies are able to go from dozens of customers, to hundreds, to thousands.

INTRODUCTION TO PLAYBOOKS

If a business requires salespeople with a set of skills that are more in line with a subject matter expert or consultant than a traditional sales person, it is said to have a complex sales structure.

Scaling up an organization working in a complex sales structure requires that all efforts aim to improve productivity, standardize best practices, reduce ramp-up time and make the workforce more autonomous.

Creating, using and optimizing a playbook can contribute to achieving these goals.

In a **complex sales structure**:

- ✓ Improve productivity
- ✓ Standardize best practices
- ✓ Reduce ramp-up time
- ✓ Make your team more autonomous

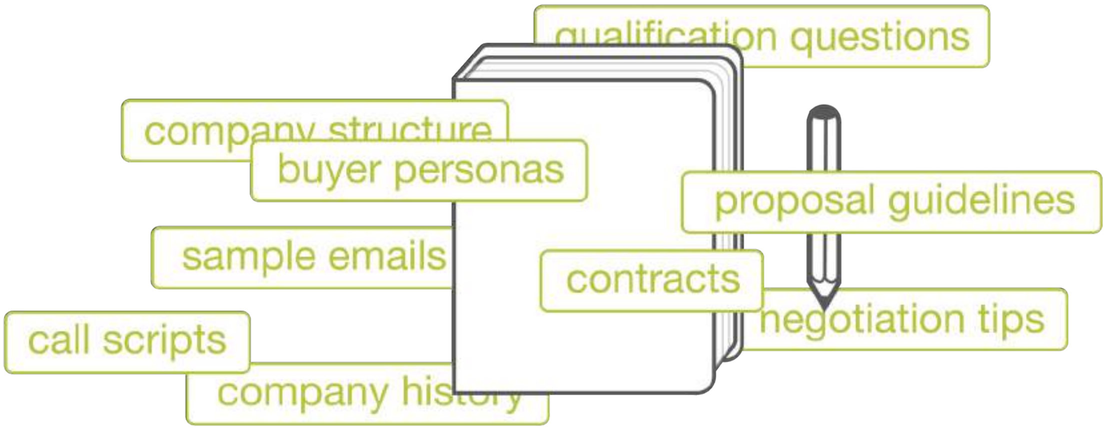
Ubity started as a team of one, and counts 30 employees today. As a result, we have been working on creating playbooks across the organization for the different processes concerning the sales team, Project team, Customer Support, Marketing, our Partner Channel and Crisis Management.

Some are in place, while others are a work in progress. In fact, even once they are finished, playbooks should **continuously be edited to adapt as processes evolve**.

While playbooks are primarily an internal tool, some can benefit from being published. Our Customer Service Playbook, for example, was made available via our online support website with the purpose of achieving a shared understanding of our Service Level Objectives (SLO). Our theory for this particular playbook is that, the more transparent we are, the more expectations align and, ultimately, the happier our customers will be.

WHAT IS A SALES PLAYBOOK ?

A Sales Playbook is **a document outlining all integrant parts of the sales process** such as a company's history and structure, business model, buyer personas, call scripts, sample emails, discovery and qualification questions, demonstration and negotiation tips, proposal guidelines and any other factor relevant to the enterprise.



✓ Arm your reps with the strategies they need to close a deal

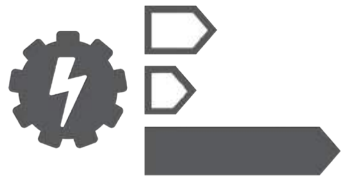
In other words, a Sales Playbook arms sales representatives with all the **content and strategies they need to close a deal**.

WHAT DOES A BUSINESS GET OUT OF IT ?

Crafting a Sales Playbook may take a lot of time, but results will start to show almost **instantly**.

Facilitate training

Improve productivity



Hone effective methods

1 FACILITATE TRAINING

First, **training new salespeople is far quicker and easier** when there are clear, explicit explanations of the ideal customers, how they buy their products, what their pain points are, and how to approach them.

Without a Sales Playbook, sales reps are forced to learn this information off-the-cuff, usually by shadowing other reps who may be making mistakes.

2 IMPROVE PRODUCTIVITY

Second, a Sales Playbook frees up time for selling. When we are active in sales, we often spend nearly a third of our day creating content or sending out ineffective and redundant follow-up messages.

Rather than having each rep develop their own messaging, questions and resources to use with prospects, a playbook provides them with ready-made content, letting them **focus on selling**.

3 HONE EFFICIENT METHODS

Third, a Sales Playbook helps to **disseminate the most effective techniques**. For example, if one rep is having success with a specific outreach method, it can easily be shared with the entire team by incorporating it to the playbook.

HOW TO BUILD A SALES PLAYBOOK

Determine who is involved

Outline your goals

Audit existing content

1 The first step is **figuring out who is involved**.

Evidently, representation from the **sales team** is critical. Ideally, it includes the head of the sales department (i.e. Vice-President or Director), along with one or several top-performing sales representatives.

Marketing needs a seat at the table too. Their team is well versed in the buyer personas, product messaging, position in the market and other very valuable insights.

Subject matter experts should also be involved in providing the insights needed to create winning sales collateral.

Finally, anyone else who is involved in the sales process that may potentially have valuable input should be considered.

Assigning a Project Manager to the crafting of the playbook to manage its timeline, content submissions and content approval can be greatly helpful.

2 Next, **outlining the business goals** behind it will help identify the content to draft, whether the project is to create a brand-new document or updating an existing one.

For example, perhaps sales representatives are struggling to identify qualified buyers. In this case, the logical approach is to start with a playbook on qualification, including an easy-to-use framework, qualifying questions and common indicators of fit.

On the other hand, if a bigger priority is improving demo quality, the playbook may instead focus on presentation strategies and structure, various value propositions linked to products' features and sample messaging.

When starting from scratch, **picking a single part of the sales process to begin** can lighten the load. Sales representatives are more likely to adopt a short, focused playbook over a long, complex, multifaceted one. Also, it's much less overwhelming to tackle building a playbook in sections rather than all at once.

3 The third step is **auditing existing content**.

Salespeople are surely already using email templates and sequences, calling and voicemail scripts, meeting agendas and presentation decks and more; auditing this pre-existing content can put these resources to good use! **Adapting existing content** will not only require less work than creating content from scratch, but reps are also far more likely to adopt content adapted from what they are already comfortable with.

As content is drafted, it is important to **categorize content according to the sales process** and the stage it relates to. For example, a testimonial would belong in the "opportunity" stage, while a sample contract would belong in a later, "qualified" stage.

SAMPLE SALES PLAYBOOK TEMPLATE

1 OVERVIEW OF THE COMPANY

This section provides a **summary of the company**: history, philosophy, high-level goals, and organization structure and hierarchy.

- ✓ History
- ✓ Philosophy
- ✓ Goals
- ✓ Structure & Hierarchy
- ✓ Sales Organization
- ✓ etc.

Unlike the majority of the Sales Playbook, which should guide the sales representatives' interactions with buyers, the overview's purpose is **getting new hires up to speed** and **familiarizing them with the basic facts** about the company.

2 SALES PROCESS

This section is absolutely critical. It dissects the **key activities that define each step of the sales process** from a first contact to closing the deal.

Who is involved in each step (representative, managers, prospects, purchasing authority, etc.)?

How is the sales function is split and how are territories assigned?

Which targets is each team held to?

Who addresses questions and requests?

What are the deliverables?

Most companies use at least one sales methodology; this should be described here as well, including how salespeople should use it, where they can go to learn more.

- ✓ Sales Methodologies
- ✓ First contact
- ✓ Who is involved
- ✓ Deliverables
- ✓ Closing the deal
- ✓ etc.

3 SERVICE OFFERS

This section should cover **every product and/or service your salespeople are responsible for selling**, along with their price points, use cases, core value offerings, buyers and end users, and related industries or verticals.

- ✓ Products
- ✓ Services
- ✓ Price Points
- ✓ Use Cases
- ✓ Core Value Offerings
- ✓ Buyers & Users
- ✓ etc.

Some companies create one Sales Playbook per product. This approach is best for enterprises whose products are fairly different or complex, implying they require radically separate buying processes or may even be sold by different members of the sales team.

4 BUYER PERSONAS

Whether using the term “Personas” or “Ideal Customer Profile” (ICP), sketching out the optimal customer will help salespeople **quickly and efficiently hone in on the most qualified leads**.

- ✓ Potential job titles
- ✓ Whom they report to
- ✓ Common challenges
- ✓ Qualification criteria
- ✓ Timeframe to purchase
- ✓ Budget required
- ✓ etc.

This profile should include the leads’ potential job titles, whom they typically report to, their key performance indicators (KIPs), common challenges and how much power they have. In addition, specify where these leads come into play in the buying process. For example, the tech team lead may be communicating with the rep from day one, while the CTO probably won’t get involved until his team has narrowed the list down to two vendors.

This is also a good place to include **qualification criteria**, such as the timeframe to purchase or the budget necessary.

5 MULTI-TOUCH CADENCE

Complex sales require the same dedication to structured outreach as transactional selling. The larger and more complex business deals are, the more autonomy salespeople likely have. This section, based on an ideal flow, lays out the number, timing, and medium of touches.

Exemple :

Day 1 : Email/InMail

Day 5 : Email in the morning, call in the afternoon

Day 10 : Call in the morning, call with a voicemail in the afternoon

Day 20 : Email in the morning, call in the afternoon with a voicemail

Day 30 : Email and call in the morning

- ✓ Outreach guidelines
- ✓ Timing & Schedule
- ✓ Medium of touches
- ✓ Break-up touch
- ✓ etc.

This cadence provides guidelines around **when to pursue opportunities and when to let them go**. For example, if the prospect has opened the rep's emails, he should continue to pursue that lead. But if the prospect hasn't looked at the last four messages, the rep should send a break-up email and move on to a higher quality lead.

6 COMMUNICATION

This section, typically one of the largest and most comprehensive, presents all **sample messaging**. This includes email templates, positioning statements, phone call and voicemail scripts, common objections and how to respond to them, meeting agendas, presentation decks, and any other pre-written resources the sales team uses.

- ✓ Email Templates
- ✓ Positioning Statements
- ✓ Call Scripts
- ✓ Common Objections
- ✓ Meeting Agendas
- ✓ Presentation decks
- ✓ etc.

It may go as far as highlighting what a great call sounds by uploading call recordings for salespeople to incorporate the takeaways into their own process. Ideally, at least one example for each stage can be referenced to, such as an intro call recording, a discovery call recording, a demo recording, and so on.

7 CUSTOMER RELATIONSHIP MANAGEMENT SOFTWARE GUIDELINES (CRM)

The purpose of this section is to **standardize what each stage means with regards to the company's CRM**, ensuring uniform usage. This includes when to move opportunities from one stage to the next, which fields are optional versus mandatory, how to create and analyze reports, how to look at the dashboard, how to use tasks and activities, how to customize the management portal, which permissions exist, what reps should be doing in the CRM on a daily, weekly, monthly or quarterly basis, and any features they should be using.

- ✓ Stages
- ✓ Fields to fill
- ✓ Report analysis
- ✓ Dashboard & Portal
- ✓ Permissions
- ✓ Features
- ✓ etc.

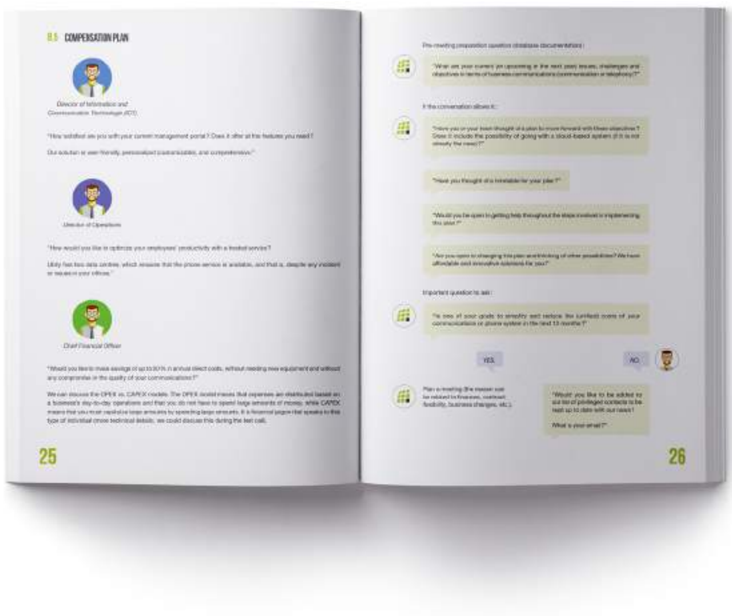
8 KEY PERFORMANCE INDICATORS (KPI)

This section puts in perspective the **Key Performance Indicator**s (KPIs) relative to a company's activities. Which **metrics** are closely tracked by a company's Sales Managers ? Which should the salesperson be paying attention to ? Are there any baseline numbers they should know about ?

- ✓ KPIs
- ✓ Tracking
- ✓ Baseline Numbers
- ✓ Analysis & Reporting
- ✓ etc.

9 COMPENSATION PLAN

If a company has a documented and well-designed **career path for salespeopl**e, it is greatly beneficial to spell it out. This section covers what milestones to achieve in every role in order to earn a promotion, the average time it takes to go from one stage to the next, the required skills or experience for each role, the salary associated with each level, etc.



- ✓ Type of plan
- ✓ Salary
- ✓ Bonuses
- ✓ Clawbacks
- ✓ Quota-setting
- ✓ Contests
- ✓ etc.

The better sales representatives understand how the salary and commission structure work, the more likely they are to execute on it. This section describes in as few words as possible what the business's compensation plan is, including type of plan it is (salary only, commission only, traditional base/bonus plan, percentage base versus bonus, etc.), accelerators and decelerators that are in play, clawbacks, quota-setting process, sales contests, sales performance incentive funds and any other element that may help qualify career milestones within the company.

10 RESOURCES

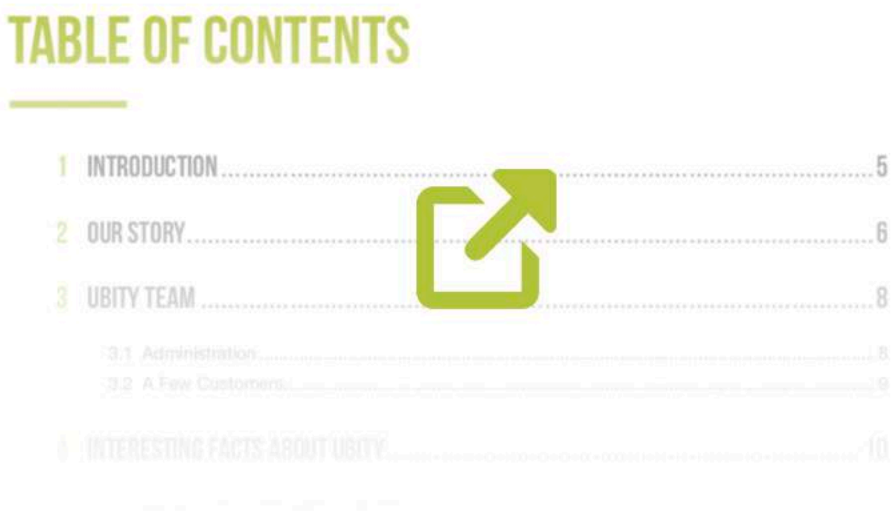
Sales representatives are always looking for relevant case studies, testimonials and customer references. Depending on how many of those resources exist and how tailored they are, including them in your Sales Playbook provides reps with **additional tools**.

Suppose a business sells to two different main customers, distinct resources to support both of them should be provided.

Having on-demand, easily accessible material means reps can easily incorporate it into their sales process, improving their close rates, and decreasing the likelihood they will improvise and use content they've created on their own, straying off-course.

11 SAMPLE TABLES OF CONTENTS

For your reference, as a potential sample, here is the current table of contents of our Sales Playbook.



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CONCLUSION

A Sales Playbook is a work-in-progress.

As the sales process evolves and improves, the product line expands or shrinks, the ideal customer shifts, the strategy changes and the sales compensation plan is tweaked, the Sales Playbook should consistently and accordingly be updated.

Keeping everyone on board is easiest when the playbook is online and accessible to the entire team at any time. When a major change is made, like adding or revamping a section, the update should be announced in a team meeting, newsletter and/or an announcement on a network like Slack as a heads-up.

A playbook is a **work-in-progress**

Keep **everyone on board** by making it **accessible**

Achieving scale requires a level of repeatable and predictable systems.

These guidelines can help to build a strong, executable Sales Playbook. Sales representatives will appreciate it, and the commitment to scalable process will be solidified.

Introduce, refine or redefine your playbooks in order to help your organization grow!

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