Callan Consulting

Sales Development Playbook Examples

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In This Deck

This deck provides a high-level overview of a typical sales development playbook developed by Callan Consulting and includes examples of real client deliverables (with confidential information removed).

Of course, every organization is different, and Callan Consulting would customize any sales development work to meet your needs. We have deep experience in this area and can help with everything from starting a sales development organization from scratch to making and experienced team more efficient and effective.

If you have questions, reach out any time – we'd be pleased to learn how we can help you.

Callan Consulting Recommends Developing a Playbook to Capture Best Practices and Guide New SDRs

For a playbook to be an effective tool in enabling your SDR team, it must document 4 key elements needed to perform the SDR role:

- **Strategy**
- **Process**
- **Messaging**
- **Core Skills**

The Playbook Should Contain All Key Materials that a New SDR Would Need to Ramp Up in the Role

Typical Playbook Contents

Sales Development Strategy
Team charter and organizational alignment
Ideal Customer Profile (ICP)
Stakeholder plan

Messaging and Scripts
Framework for customizing messaging
Battlecards:
- Value propositions
- Use case stories
- What to look for in a prospect
- Discovery and qualification questions
- Benefits positioning statements
- Objection handling

Scripts and templates

Sales Development Process
Sales Development process overview (stages and definitions)
- Prioritization
- Pre-call research
- Touch patterns
- Qualification & handoff

Qualification criteria
Rules of engagement & SLAs

Skill Development and Expectations
Expectations & quota
Daily / weekly / monthly plan
Working with your AE
Core sales skills (e.g., questioning tactics, note taking)

SDR Playbooks Define the Process, Key Activities, and Core Best Practices SDRs Need to Be Effective

The Best Practices of Successful SDRs Can Be Formalized to Help Struggling SDRs and New Hires

PROCESS

- Scraping
  - ✓ do it consistently everyday
  - ✓ Feed new contacts into sequences the next morning
- Prospect research (15 min timed)
  - ✓ Company messaging
  - ✓ News
  - ✓ Annual reports
  - ✓ Job posts, to understand what the prospect's job requires
- First call is 5-10 min of selling; most of call is qualification questions
- Sequences - use ones without calls, when appropriate, to ensure prospects get dripped emails

MESSAGING

- Use shorter emai relevant phrase t
- Review notes fro opportunities to relevance for exis
- When sending m recap the previou solved that for ot reconnect
- Effective CTAs:
  - ➢ "Set up a call v dive deeper or
  - ➢ "To get the be have a manag and in 30 minu questions answ

SKILLS DEVELOPMENT

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SDR Process Map

	Target	Research	Engage	Qualify
Objective	Determine who to reach out to (accounts first, individuals next)	Develop relevant messaging for the prospect	Execute outreach activities to prospect	Determine fit between prospect and solution
Key Activities	<customized to client>			
Key Tools	• Ideal Customer Profile (ICP) • Stakeholder Plan • BDR-AE 1:1 plan	• Research checklist • Customer stories	• Sequence map • <client specific> messaging framework	• Opportunity qualification definition • Qualification Call Framework • Handoff process (BDR-AE)
Exit Criteria	Proceed if targets identified	Identify relevant pain points ("the hook") for the prospect	• If contacted, proceed to qualification • If no contact made, move to nurture	• If qualified, create oppty • If not qualified, move to nurture

Sales Pipeline

SDR Teams Receiving Inbound Leads Need Guidance on How to Prioritize Leads to Maximize Potential Conversion

Lead Prioritization

Lead prioritization focuses inbound triage efforts on highest potential for conversion

Type	Mid-Market	Enterprise
Preferred Accounts (“Ideal Customer Profile”)	Industries: • Professional Services • Technology companies • Medical Practices • Restaurants	Ideal Metrics: • 10-100 employees • 50-1000 small business clients • Website / Digital presence • Offers fixed fees or subscription • Advisory services
High Priority Lead Sources	• Inbound call • “Contact Us” form • Corporate email given • Inbound lead from “<company name>” website • Direct Google search for “<company name>” • Lead from execs/referrals	• Inbound call • “Contact Us” form • Inbound lead from <company name> Partners Page • Corporate email given
Medium Priority Lead Sources	• Interacted with payroll-themed content • Re-engage lists	• Event follow-up • Re-engage lists
Low Priority Lead Sources	• Facebook • Advertising Campaigns	• Webinars • Facebook

We Provide Specific Tools that Help SDRs Complete Each Step of the Prospecting Process

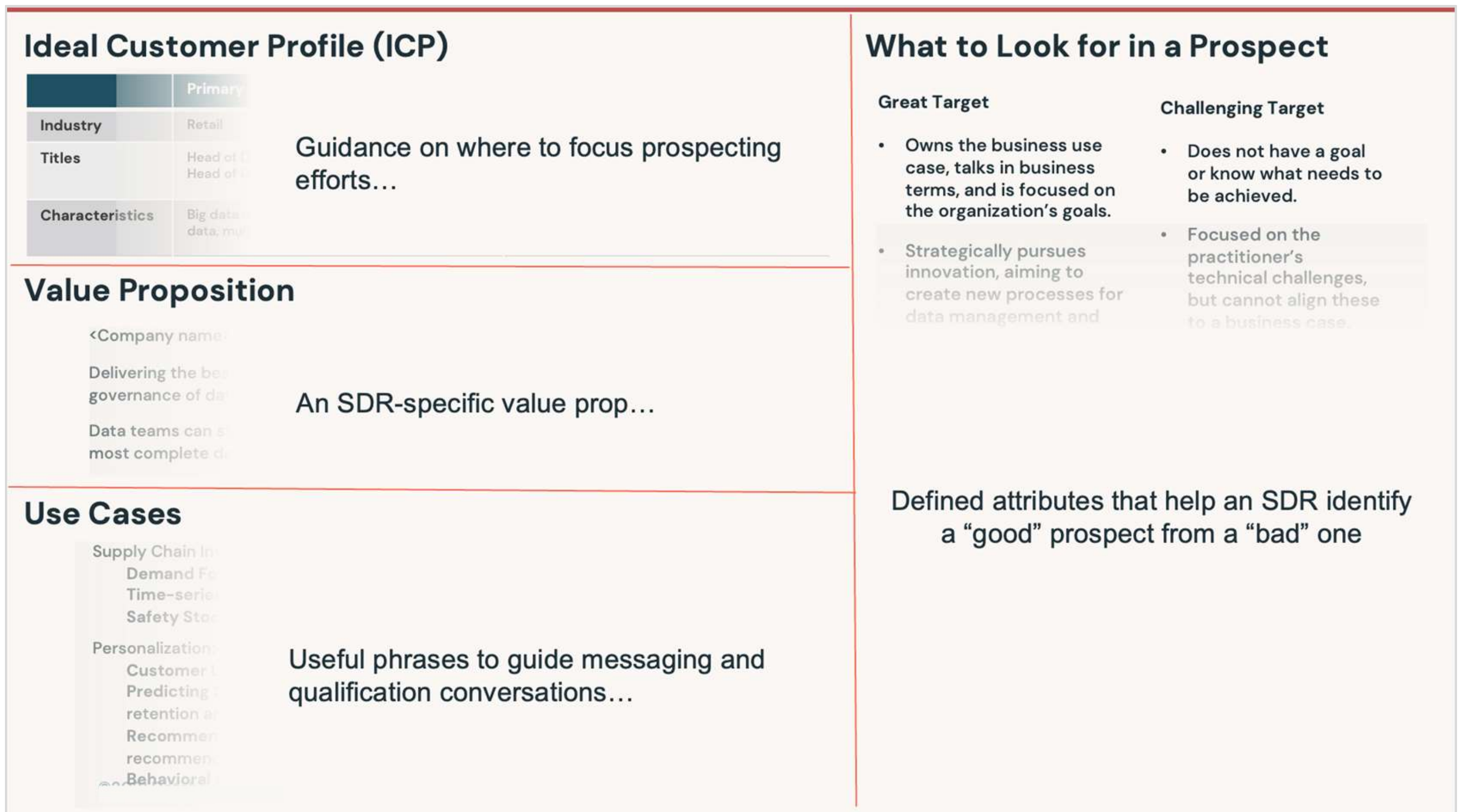
Research: Learn about the prospect before reaching out

Type	Topic	Description	Where to look	Always check
Account	What They Sell	Understand what the account sells, and to whom.	Website, Google, LinkedIn	✓
	Prior Activity, History	Identify any past interactions or sales activities in the account.	Salesforce	✓
	Trigger Events	Identify key events (legislation, funding, major product release) that will drive behavior within the company. Look for specific mentions around <client's key business>	Website, Annual Report/10K, Google, LinkedIn, Crunchbase	If available
Persona	Role & Responsibilities	Identify the contact's role within the organization and how they align to <client> personas.	LinkedIn Profile, Job Postings	✓
	Contact Information	Find relevant and accurate contact information (email, phone, social).	LinkedIn, Google, Third-Party Data Vendors	✓
	News	Determine whether the contact has recently changed jobs or has been featured in industry news.	Website, Google, LinkedIn, Twitter, Annual Report, Press Releases	If available
Peer	1-2 Peer Companies	Identify accounts with similar challenges to guide formation of the <customized to client messaging>.	Internal customer list (Salesforce), <other places customized to client>	✓
	1-2 Peer Connections	Identify connections, when available, between you or your organization and the prospect.	LinkedIn	If available
Time				< 20 mins

Messaging Battlecards Arm SDRs with the Right Level of Information They Will Need for Prospecting

Battlecards include information such as:

- ICP
- Value Prop
- Use Cases
- Qualification Questions
- Objection Handling
- Proof Points
- Customer Stories



Meet the Team

Callan Consulting Has Deep Experience Providing Best-in-Class SDR and Sales Enablement Support

Callan Consulting has been providing strategic product marketing services to technology companies since 2000

- Team of former technology marketing executives, led by Ed Callan

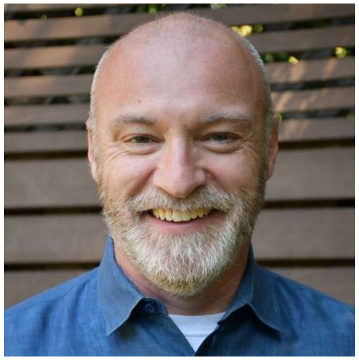
We have conducted more than one thousand projects to support product marketing teams

- Market opportunity assessments, thought leadership research and materials, launch support, sales enablement materials, verticalization, white paper/collateral development, competitive intelligence, pricing and packaging, and more

Partial List of Current and Former Clients

DocuSign, Google, TOPO, Dropbox, LeadMD, nintex, FINANCIALFORCE, APPDYNAMICS, smartsheet, SECTIGO, CLEARSLIDE, Productiv, vmware, onelogin, IDC Analyze the Future, Hewlett Packard Enterprise, CISCO, bitly, Seismic

Callan Consulting Project Team Brings Decades of Sales Development and Sales Enablement Marketing Experience *(Team Would be Customized for Each Client)*



Ed Callan

Founder and CEO

- 30+ years of experience in strategic marketing and consulting
- Former CMO at Intershop
- Project role: executive sponsorship, messaging input, workshop facilitation

Kristina McMillan

Principal Consultant

- 15+ years of experience in GTM strategy and consulting
- Expert in Sales Development strategy and execution
- Former VP of Sales Research at TOPO/Gartner
- Project role: overall project lead, audit and onboarding development lead

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