
Sales
training

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Custom-Built
SALES TRAINING

A personal course to start selling!

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Introduction	1	2	3	4
	Assess Current Situation	Market Positioning	The Sales Process	Selling Technique

Create a Playbook

Your playbook will consist of four stages, each with a description, steps and action items. Action items include using tools & templates you'll build in your very own Playbook along the way. My intention with this playbook is to help you:

Understand sales processes and techniques to identify opportunities that will improve your personal capabilities

Evaluate and select the appropriate resources and technology to be used as the backbone of your Sales Strategy

Plan and craft a Sales Training course based on your level of experience, audience, and the product or service

Outputs from This Playbook

Stage 1 - Assess Current Situation

Background, Skillsets, Agenda

Stage 2 - Market Positioning

Unique Selling Proposition (USP), Competitive Analysis, Customer Profile & Buyer Persona Templates

Stage 3 - The Sales Process

Buying & Sales Processes, Sales Playbook, Customer-Centricity

Stage 4 – Selling Technique

Presenting With Confidence, Responding to Objections, Influence, Scripts, Proposals, Closing

What Goes Inside a Sales Playbook?

A Sales Playbook is a collection of information, knowledge, sales tools, and activities that have been proven to assist with closing business in a variety of common sales situations.

A Basic Playbook playbook consists of:

- Company/Position Overview
- Marketing Insights
- Sales Opportunities

Stage 1 – Need / Prospecting
Stage 2 – Discovery / Qualification
Stage 3 – Consideration / Demo
Stage 4 – Decision / Proposal
Stage 5 – Review / Contract

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STAGE 1
Assess Current Situation

In this Stage, we will focus your efforts around analyzing the current sales process, identifying your gaps in skillsets, and developing a plan moving forward.

Key steps in this stage include:

STEP 1: Conduct a Strategic Sales Session
STEP 2: Assess Skillsets
STEP 3: Create a Sales Strategy Scorecard

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STEP 1

Conduct a Strategic Sales Session

Action Item

Assess strengths and weaknesses when it comes to preparing newer sales professionals to engage customers and win deals.

Areas of the assessment include:

Sales Process Knowledge

Self-Management & Planning

Business Development

Presentation /Awareness

Relationship Management

STEP 2

Assess Skillsets

Action Item

Evaluate skillsets and determine the areas of needed improvement.

Sections of the Skills Assessment include:

Relevant Knowledge

Sales Skills Professionalism

Account Management

Customer Service

STEP 3

Create a Strategy Scorecard

Action Item

Use a Strategy Scorecard to document sales learning objectives, early initiatives and targeted timeframes.

Examples of common objectives include:

- Adoption of a Playbook
- Identify Gaps
- Engage The Sales Process
- Evaluate and Adjust
- Action & Accountability

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STAGE 2
Market Positioning

In this Stage you will start the training process of understanding the market you operate in, needs of the buyers, key competitors, and how to differentiate your products and services.

You will perform the following actions on your market position:

STEP 1: Identify Your "Ideal" Customer Profile

STEP 2: Learn Competitive Features & Activity

STEP 3: Create a Unique Selling Proposition

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STEP 1

Communicate "Ideal" Customer Profile

Action Item

Begin with Ideal Customer and Persona Templates to start collecting information about the target audience and the decision-making process you will encounter.

The Customer Profile should include information on:

Size
Location
Environment
Technical Buyers
Economic Buyers

STEP 2

Learning Competitive Knowledge

Action Item

Complete a Competitive Analysis in your industry, understand relative strengths and weakness, activity, and positioning.

How you categorize competitive product features:

Offered Available via Partner
Differentiator (category leader)
Not Available
Social Scoring

STEP 3

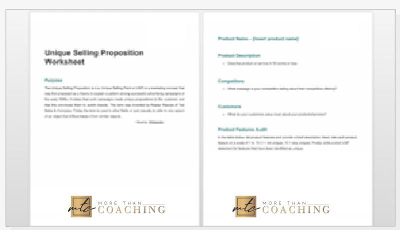
Train on Unique Selling Proposition

Action Item

Use a Unique Selling Proposition Template to identify the unique selling features of your product/service to help differentiate yours when speaking with prospects. 'Why you?'

Key information in your worksheet:

Description
Customers
Product
Features
USP Statements


Unique Selling Proposition Worksheet

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STAGE 3

The Sales Process

In this Stage you will begin learning a standardized sales process and sales techniques.

Key activities include:

STEP 1: Map Buying & Selling Processes

STEP 2: Qualifying Leads

STEP 3: Becoming Customer-Centric

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STEP 1
Map The Buying & Selling Processes

Action Item

Use a Buying Process Stage Template to map your sales process to ensure it aligns with the buying process, including what actions need to happen at each stage for success.

Key stages in the Buying/Selling process:

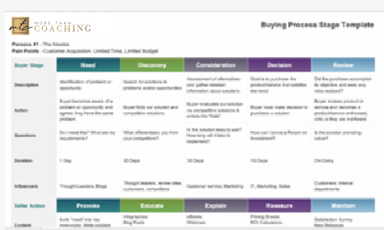
Need / Prospecting

Discovery / Qualification

Consideration / Demo

Decision / Proposal

Close / Contract



STEP 2
Teach How to Qualify Sales Opportunities

Action Item

Use a Qualified Lead Definition Tool to outline the key criteria required for a sales lead to be considered qualified..

Key qualification criteria:

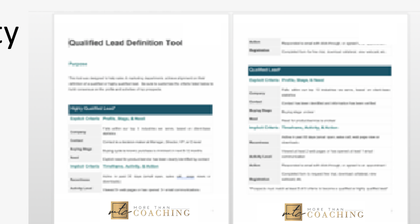
Company

Contact (decision-maker)

Buying Stage & Needs

Spending Authority

Recentness of Activity



STEP 3

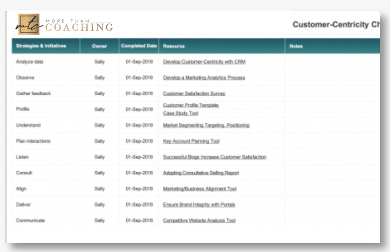
Develop a Customer-Centric Approach

Action Item

Use the Customer-Centric Checklist to deliver customer-centricity. This template is centered on the following best practices: Reliability, Responsiveness, Flexibility, and Partnership.

A Customer-Centric Checklist includes:

- Best practices
- Strategies and tactics
- Priorities
- Communication



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Customer-Centricity Ch

Strategies & Initiatives	Owner	Completed Date	Resource	Notes
Analyze data	Sally	01-Sep-2018	Develop Customer-Centricity with CRM	
Observe	Sally	01-Sep-2018	Develop a Marketing Analytics Process	
Gather feedback	Sally	01-Sep-2018	Customer Satisfaction Survey	
Profile	Sally	01-Sep-2018	Customer Profile Template Case Study Tool	
Understand	Sally	01-Sep-2018	Market Segmenting Targeting, Positioning	
Plan interactions	Sally	01-Sep-2018	Key Account Planning Tool	
Listen	Sally	01-Sep-2018	Successful Blogs Increase Customer Satisfaction	
Consult	Sally	01-Sep-2018	Adopting Consultative Selling Report	
Align	Sally	01-Sep-2018	Marketing/Business Alignment Tool	
Deliver	Sally	01-Sep-2018	Ensure Brand Integrity with Portals	
Communicate	Sally	01-Sep-2018	Competitive Website Analysis Tool	

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STAGE 4

Selling Technique

In this stage you will start to learn a Consultative - SPIN Selling Model.

Training will focus on the following:

- **STEP 1:** Asking Questions to Create Need
- **STEP 2:** Relating Needs to Features
- **STEP 3:** How to Communicate Value
- **STEP 4:** How to Deal with Objections
- **STEP 5:** How to Present Your Solution
- **STEP 6:** How to Customize a Proposal
- **STEP 7:** How to Manage a Geography
- **STEP 8:** How to Analyze Stakeholders

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STEP 1

Asking Questions to Create Need

Action Item

You will use the SPIN Selling Question Tool to learn how to consult your prospects and customers, earn their trust and respect, and understand their most pressing challenges.

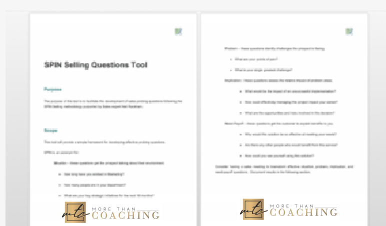
Types of open-ended questions you'll learn to ask:

Situation

Problem

Implication

Need-Payoff



Note – This method is derived from Neil Rackham's [SPIN Selling](#) methodology.

ALL Attendees Receive a Free Paperback Copy

STEP 2

Related Needs to Relevant Features

Action Item

Use a Feature Benefit Tool to learn how to relate the needs of your prospects to the right features of your product or solution.

What is the difference between an advantage and a benefit?

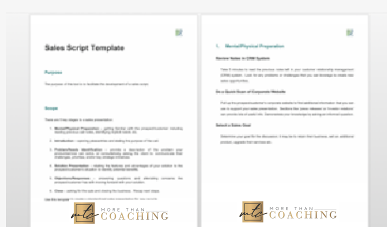
STEP 3
How to Communicate Value

Action Item

You will craft Sales Scripts so you know how to communicate the value propositions of the various features in your solution.

Key characteristics of a good script:

Real-World
Based on Success
Humanized
Adaptable
Specific
YOU!


Sales Script Template

STEP 4
How to Deal with Objections

Action Item

Use the Objection Response Tool to overcome the most common objections you're likely to face when selling your solution.

Framework for handling objections:

- **Soften** – show empathy
- **Confirm** – paraphrase
- **Respond** –a logical or emotional argument
- **Close** – start with a trial-close


Objection/Response Tool

STEP 5

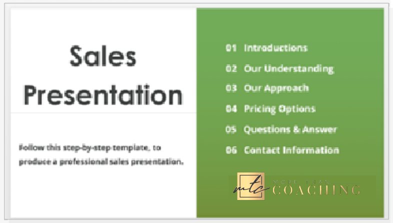
How to Present Your Solution

Action Item

You'll have a Presentation Template to create a standardized sales presentation Pitch Deck that's customizable depending on the selling situation.

Here is a format for presenting:

- Introductions
- Our Understanding
- Our Approach
- Pricing
- Questions & Answers
- Contact Information



STEP 6

How to Generate a Proposal

Action Item

Learn to create a standardized Sales Proposal

Tips for winning more proposals:

- **Quick Follow-Up** – deliver within 24 hours
- **Proofread** – grammar and spelling
- **Be Thorough** – no 'unsupervised' thinking
- **Pricing** – concise and all relevant costs
- **Guarantees** – include warranties

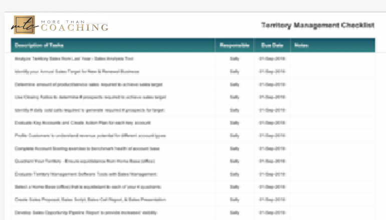
STEP 7
How to Manage Sales Territories

Action Item

Use the Territory Checklist to provide best practices related to efficiently working any given geography.

Here are some 'best practices' to consider:

Identify your average sale size
Closing ratios to generate prospects to quota
Create Key Account Plans


Territory Management Checklist

Description of Tasks	Responsible	Due Date	Notes

STEP 8
How to Analyze Key Stakeholders

Action Item

Learn how to evaluate all Stakeholders involved in a complex sales process and identify strategies that can influence the deal.

What goes into an influencer map?

Stakeholder Name
Decision Maker Role
Interest?
Power?
Buy-In Support?
Flexibility?

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Course Summary

Your path to fearless selling!

- **A Custom-Built and Personal Sales Training Course**
- **1-on-1 or Group Training Options**
- **All Tools and Resources in the Playbook are Yours to Keep**
- **Guaranteed Support Service Outside of Regularly Scheduled Training Sessions**

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MY PROMISE TO YOU

"I'm driven to work and determined to win. I take great pride in becoming part of a unified team who share these common goals: To create compelling and engaging content, to personalize the buying process and make it flexible for future customization, and to help to create an intentional process for developing high-potential sales leaders in your organizati

David Liberati

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