Sales Playbook

15 Steps for Sales Playbook Success

1. **Perform research to create ‘insights’** on why buyers should think and act differently than status quo – why should they change?
2. **Conduct VOC research** with high value accounts to learn their buying process and **understand your perceived differentation**
3. **Refine your value proposition** and work with top sales reps to document messages that work to acquire high value accounts
4. **Identify your most profitable accounts and create your ideal customer profile (ICP)**
5. **Define buyer personas** for all on the buying team, inlcluding their roles, motivations, concerns, and key issues
6. **Develop a customer journey map** with key touchpoints across channels, needs/wants, expectations and desired outcomes
7. **Define qualified lead/account scoring critieria,** determine when leads are passed to Sales, or passed back to Marketing
8. **Define and align the buying/sales process,** including core content, key messages, duration and influencers
9. **Audit your content and align it to the buying/sales process** to identify gaps, and develop new content for prospects and sales reps
10. **Build ‘plays’ for how to move each opportunity to the next stage** in the buying/sales process, including updating your CRM system
11. **Outline expectations for sales** rep activity metrics, follow-up times, etc. and include any SLAs between Sales & Marketing
12. **Communicate marketing campaigns**, nurture programs, events, etc. to sales reps
13. **Integrate playbook and content assets into your CRM system** with a sales enablement platform
14. **Roll out to sales reps**, monitor adoption and correlate to sales results
15. **Update regularly** with new ‘best practices’ discovered over time

Key Insights

Why Do Our Prospects Need to Change?

Key Insights

Enter your key insights, based on primary research with customers, that challenge prospects to think differently about their current situation. These may be stats that demostrate that companies who implement your type of solution are more likely to grow revenue, increase profitability, etc.

Without having any key insights to challenge the status quo, why should your prospects care to change? Inaction is often your top competitor.

Our Customers

Who Are They and How Do We Provide Value

Ideal Customer Profile

Demographics (who they are)	
Annual Revenue	$100M - $500M
# Employees	250-1,000
Industry	Healthcare
Psychographics (how they think)	
Culture	Open to new ideas and change, flexible and agile in their approach
Growth Orientation	Focused on growth and testing new ideas that produce increased results
Technology Adoption Profile	Early adopters of new technologies
Behavioral (how they act)	
Engagement	Conduct research and consume lots of content from various sources before making decisions
Buying Process	Team-based, typically initiated by one department, then moves to a cross-functional team
Environment (their situation)	
Technology Landscape	Have implemented Salesforce and a marketing automation platform (Pardot, Oracle, Hubspot, etc.)
Geographic Location	Based in USA, Canada, UK, ANZ, or Western Europe
Alignment with I/T	I/T is supportive but allows for solutions to be tested in departments with minimal oversight

Value Proposition

	For:	Product is:	Ideal for:	Better than:	Because:
Key Criteria	*Describe your ideal customer profile.*	*Provide concise description.*	*Describe best use or application for product.*	*Identify primary competitor or competing approach.*	*Focus on your differentiation and other evidence to back up your claim of superiority.*
Our Product					

Buyer Personas

Business Buyer Persona	
Age	28
Income	$45,000/year
Experience	5 years in Marketing
Education	University or College Degree in Business
Decision-Making	Make decisions quickly
Likes & Dislikes	Like being active and busy, dislike pushy salespeople and complex software
Media	Read online daily, have far too many email newsletter subscriptions
Habits & Skills	Excellent project manager and skilled at working with outside agencies
Research	Typically get information from reading reviews onilne or talking to peers
Technology Skills	Uses Microsoft Office but I/T manager makes it difficult to buy new software
Buying Power	Has sign-off authority for under $1,000
Purchasing Process	Reviews products, discusses with team and makes purchase with credit card

Technical Buyer Persona	
Age	36
Income	$75,000 per year
Experience	10 years in Information Technology
Education	University Degree in Computer Science
Decision-Making	Doesn't like to make decisions quickly
Likes & Dislikes	Dislikes end users who violate security policies
Media	Online forums with techies, virtual conferences, technology analyst reports
Habits & Skills	Very organized and tech savvy, not the best communicator
Research	Posts questions on forums, reads whitepapers, contacts reference clients
Technology Skills	Runs the datacenter and network for the business
Buying Power	Can authorize purchases up to $5,000
Purchasing Process	Identifies trends, researches solutions, requirements, vendors demos, contracts

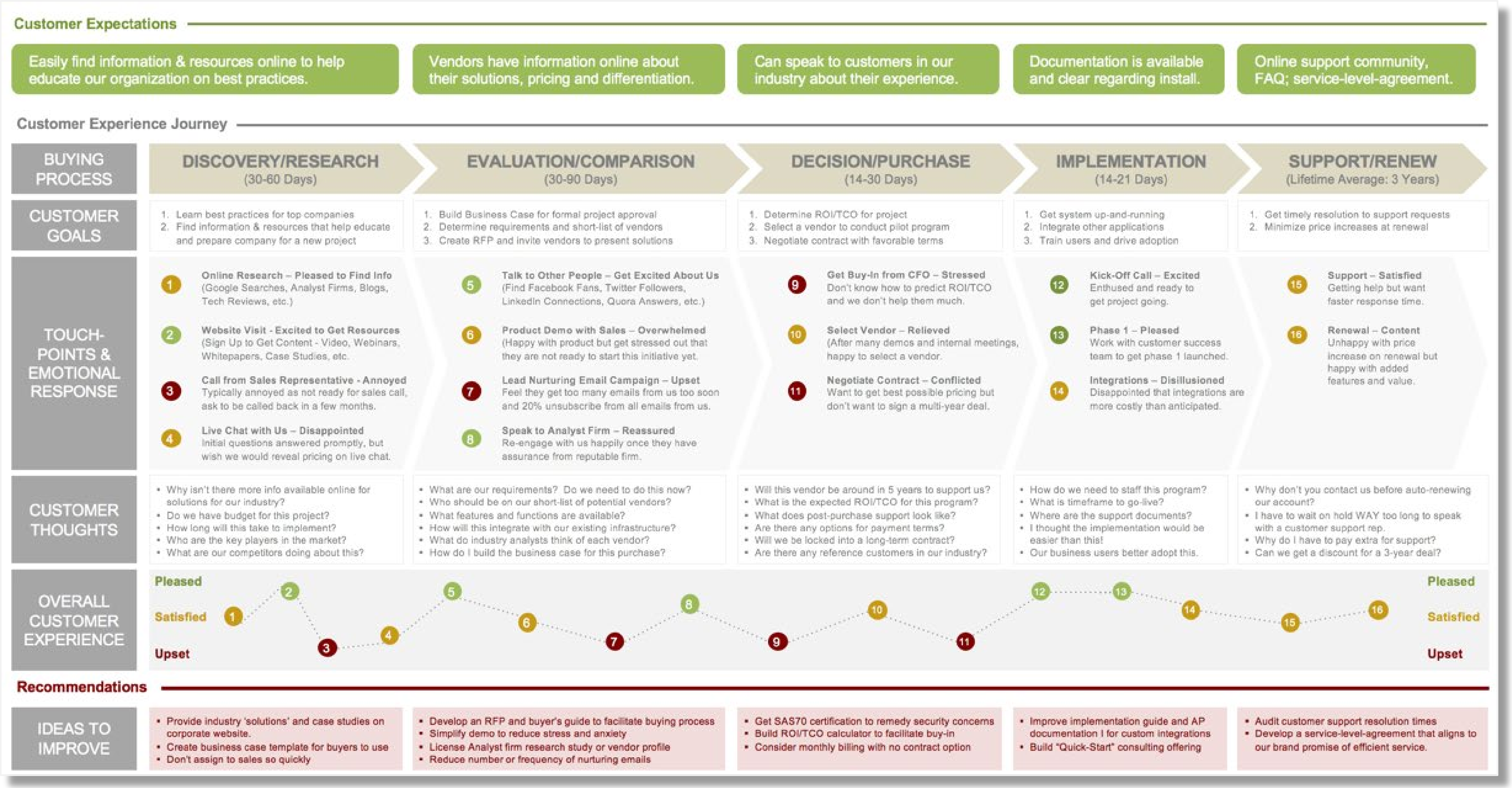
Qualification Criteria

Criteria	Description
Annual Revenue	50M – 500M
Contact	Director, VP, or C-Level Decision-Maker
Buying Stage	Stage is known, purchase to be completed within 18 months
Need	Explicit need has been stated by our key contact
Recentness	Active in past 60 days (call, email open, download, etc.)
Activity	Viewed 5+ pages on website, completed demo, or clicked on 3+ emails
Actions	Agreed to a sales demo
Registration	Completed online form, or requested demo from a trade show
Hand-Off	Assigned to Sales when score reaches 100 points, handed back to marketing after 4 weeks of inactivity

Our Sales Process

How Do Our Customers Ultimately Come On-Board

Customer Journey Map



Buying/Sales Process

Buyer Stage	Need	Discovery	Consideration	Decision	Implement
Description	Buyer aware they have problem	Search for solutions	Assessment of alternatives	Purchase product that fits their needs and problems	Did the purchase accomplish its objective?
Action	Buyer becomes aware of a problem or opportunity	Buyer finds our solution and competitive solutions	Buyer evaluates solutions & enters into “trials”	Buyer must make decision to purchase a solution	Buyer reviews product or service and becomes a product/service enthusiast
Key Questions to Ask	Do I need this? What are my requirements?	What differentiates you from the competition?	Is solution easy-to-use? Implementation time?	How can I prove ROI?	Is the solution providing value?
Duration	1 Day	30-90 Days	30-60 Days	15 Days	On-going
Influencers	Thought Leaders, Blogs	Review sites, customers, competitors	Customer Service, I/T, Senior Executives	Senior Executives, I/T, References	Internal users, business unit leaders, senior executives
Seller Goal	**Provoke**	**Educate**	**Explain**	**Reassure**	**Maintain**
Content Types	Build need into key messaging, blog posts	Infographics, viral videos, analyst reports	eBooks, white papers, demo videos, case studies	Pricing sheets, ROI calculators, testimonials	Satisfaction survey, product roadmap, new features
Core Messages	Key benefits like save time or money	Points of differentiation	Solution is easy to use and implement	Solution has positive ROI, and is self-funding	We are here to help 24/7
Sales Cycle Stage	**Prospect**	**Qualification**	**Demo**	**Proposal**	**Contract**

Content & Sales Tools

Resources We Provide to Help Our Customers Buy Faster

Content & Sales Tools

	Prospecting/ Needs Analysis	Qualification/ Discovery	Demo/ Consideration	Proposal/ Decision	Contract/ Implement
Customer-Facing Content Assets	▪ Buyers Guide ▪ Infographic ▪ Research Report	▪ Whitepapers ▪ Overview Video ▪ On-Demand Webinars	▪ Case Studies ▪ Datasheets ▪ Customer Testimonial Videos	▪ Customer Reviews on 3rd party Websites ▪ ROI Calculator ▪ Customizable Presentation Deck	▪ On-Boarding Package ▪ Implementation Services Guide ▪ Customer Community
Internal Sales Tools	▪ Personalized Video Introduction Script ▪ LinkedIn Connection Request Templates ▪ Appointment Booking Script	▪ Lead Qualification Checklist ▪ SPIN Selling Questions Tool ▪ Feature, Advantage, Benefit Tool	▪ Demo Script ▪ Objection Response Tool ▪ Key Account Analysis & Reporting Tool	▪ Sales Presentation Template ▪ Sales Proposal Template ▪ Decision-Maker Influencer Map	▪ Contract Templates ▪ Pricing Guide ▪ CPQ System

Deal Advancement Plays

Your Stage-by-Stage Playbook for Moving Deals Forward

Deal Advancement Plays

PROSPECTING – Help the Buyer to Understand the Need		
Key Messages	In this section include some of the key messages or ‘talk tracks’ that top performing reps have been successful using to generate appointments to talk.	
Contact Approach	▪ LinkedIn Connection Request ▪ Ask for Intro on LinkedIn from a joint connection	▪ Send email to request meeting after prospect visits your website ▪ 5 phone calls a week until you book appointment
Content Assets by Buyer Persona	CIO at 500M/year pharmaceutical company ▪ Technical Webinar about Disruptive Innovation ▪ Blog post on new ways to integrate applications faster ▪ Other content or assets that help to build need	CFO at 500M/year pharmaceutical company ▪ Webinar about the Financial Impact of Not Changing ▪ Blog post on how existing architecture is losing you money
Key Objectives	▪ Book a 30 minute discovery call to discuss needs ▪ Invite to upcoming webinar on ‘need-building’ topics	
Success Metrics	Enter the number of new prospects that sales reps need to add to the funnel each month to hit their quota, based on historical metrics from top reps.	
What to Listen for:	If there are key signals the buyers send to indicate an urgent need, enter those types of comments in here to help new reps listen out for hot prospects.	
Sales Tools	Include links to any sales tools you have that will help for this stage such as: Personalized Video Introduction Script, LinkedIn Connection Request Templates, Appointment Booking Script	
Updating CRM	Include instructions and information that needs to be updated in the CRM system following the completion of this stage such as demo date, key contacts, preliminary needs and requirements, etc.	

Deal Advancement Plays

QUALIFICATION - Help the Buyer Discover Your Solution		
Key Messages	In this section include some of the key messages or 'talk tracks' that top performing reps have been successful using to qualify opportunities.	
Qualification Criteria	▪ Has budget to purchase in next 6-18 months ▪ Expressed explicit need for a solution that you can provide	▪ Has been active (online or phone calls) in past 60 days ▪ Decision-making authority to make a purchase
Content Assets by Buyer Persona	CIO at 500M/year pharmaceutical company ▪ Infographic on Industry Situation ▪ Analyst Report with Benchmarking Info ▪ Other content or assets that help to qualify need	CFO at 500M/year pharmaceutical company ▪ Webinar about Organizational Readiness ▪ Blog post on 'is this the right fit for you'? ▪ Case Study on company in same industry
Key Objectives	▪ Book a 60 minute call with a Sales Engineer to discuss technical requirements and qualify the opportunity ▪ Understand the decision-making process, key requirements, identify stakeholders, and determine timeframe for a decision	
Success Metrics	Enter the number of prospects that sales reps need to qualify each month to hit their quota, based on historical metrics from top reps.	
How to Qualify	Enter the key qualification questions here such as 'who is involved in the decision-making process?', 'what is your timeframe for implementation?', etc.	
Sales Tools	Lead Qualification Checklist, SPIN Selling Questions Tool, Feature, Advantage, Benefit Tool	
Updating CRM	Include instructions and information that needs to be updated in the CRM system following the completion of this stage such as key influencers, decision timeframe, competitors, etc.	

Deal Advancement Plays

DEMO – Get the Buyer to Consider Your Solution		
Key Messages	In this section include some of the key messages or 'talk tracks' that top performing reps have been successful using in the demo stage.	
Impact Questions	▪ How will a solution like this impact your company technically? ▪ If you don't do anything, what is likely to occur?	▪ If we can save you 100 hours of time, how much is that worth to you? ▪ Can you visualize your organization after a solution like this is in place?
Content Assets by Buyer Persona	CIO at 500M/year pharmaceutical company ▪ eBook from CEO ▪ Webinar on Top Technical Benefits	CFO at 500M/year pharmaceutical company ▪ Joint Webinar with Analyst Firm ▪ Other content assets that help to demonstrate your solution
Key Objectives	▪ Complete a 30-60 minute demonstration of your solution ▪ Customize the presentation so it fits the prospects requirements and industry	
Success Metrics	Enter the number of prospects that sales reps need demo each month to hit their quota, based on historical metrics from top reps.	
Demo Tips	Enter any specific tips that have worked well on past demonstrations, such as call structure, presentation advice, specific questions or analogies used.	
Sales Tools	Demo Script, Objection Response Tool, Key Account Analysis & Reporting Tool	
Updating CRM	Include instructions and information that needs to be updated in the CRM system following the completion of this stage such as Opportunity Amount, Close Date, Key Objections, Products & Services in Solution, Implementation Timeframe, etc.	

Deal Advancement Plays

PROPOSAL – Get the Prospect to Select Your Solution		
Key Messages	In this section include some of the key messages or ‘talk tracks’ that top performing reps have been successful using in the proposal stage.	
How to Reassure	▪ Provide 2-3 reference clients in their industry ▪ Ask if they would like to speak to a key product manager	▪ Develop a customized proposal based on the prospect’s needs ▪ Follow up diligently and don’t be late for any appointments
Content Assets by Buyer Persona	CIO at 500M/year pharmaceutical company ▪ Business Case ▪ Technical Implementation White Paper ▪ Video Testimonials	CFO at 500M/year pharmaceutical company ▪ ROI Calculators ▪ Case Studies ▪ Pricing Sheets
Key Objectives	▪ Craft a compelling proposal that includes all of the prospects requirements and get a firm date for a decision ▪ Identify competitors on the deal and communicate your key differentiation to all relevant stakeholders	
Success Metrics	Enter the number of prospects that sales reps need send proposals to each month to hit their quota, based on historical metrics from top reps.	
Proposal Tips	Enter any specific tips that have worked well for past proposals	
Sales Tools	Sales Presentation Template, Sales Proposal Template, Decision-Maker Influencer Map	
Updating CRM	Include instructions and information that needs to be updated in the CRM system following the completion of this stage such as Updated Opportunity Amount, Updated Close Date, Key Competitors, Decision-Maker Influencer Map, and any notes or tactics to win the deal.	

Deal Advancement Plays

CONTRACT – How to Get the Deal Signed		
Key Messages	In this section include some of the key messages or 'talk tracks' that top performing reps have been successful using in the contract stage.	
Things to Capture	▪ Willingness to be a reference customer ▪ Ask if they will do a video testimonial	▪ Commitment to participate on a panel at a webinar or conference ▪ The reasons they chose your solution
Content Assets by Buyer Persona	CIO at 500M/year pharmaceutical company ▪ Service Level Agreement ▪ Implementation Roadmap & Project Plan ▪ Letter of Intent	CFO at 500M/year pharmaceutical company ▪ Purchase Contract ▪ Any warranties or guarantees
Key Objectives	▪ Send the purchase contract to be signed to close the deal ▪ Determine timeframe for implementation and professional services kick-off dates	
Success Metrics	Enter the number of prospects that sales reps need send contracts to each month to hit their quota, based on historical metrics from top reps.	
Contracting	Enter any specific tips that have worked well for past contracts and how to smoothly transition to the delivery team for implementation	
Sales Tools	Contract Templates, Pricing Guide, CPQ System	
Updating CRM	Include instructions and information that needs to be updated in the CRM system following the completion of this stage such as Updated Opportunity Amount, Updated Close Date, Implementation Kick-Off Date, etc.	

Expected Metrics

What You Need to Do Each Month to Succeed Here

Expected Metrics

Prospect Connections	Qualified Demo Appointments Booked
✓ 50+ New LinkedIn Connections Per Month ✓ Send 25+ InMails to Targeted Prospects ✓ Send 100+ Invitations to Connect	✓ Book 30 New Qualified Demos Per Month ✓ 80% Attendance Rate to Booked Demos ✓ 24 Completed Demos Per Month
Opportunities Generated	**Sales & Revenue**
✓ Create 18 New Opportunities Per Month ✓ Close 30% of Opportunities ✓ Average Sales Cycle Under 180 Days	✓ Close 4 New Deals Per Month ✓ Average Contract Value: $15,000+ ✓ Monthly Revenue: $60,000+

Marketing Campaigns

Air Cover to Support Your Sales Activities and Effort

Marketing Campaigns