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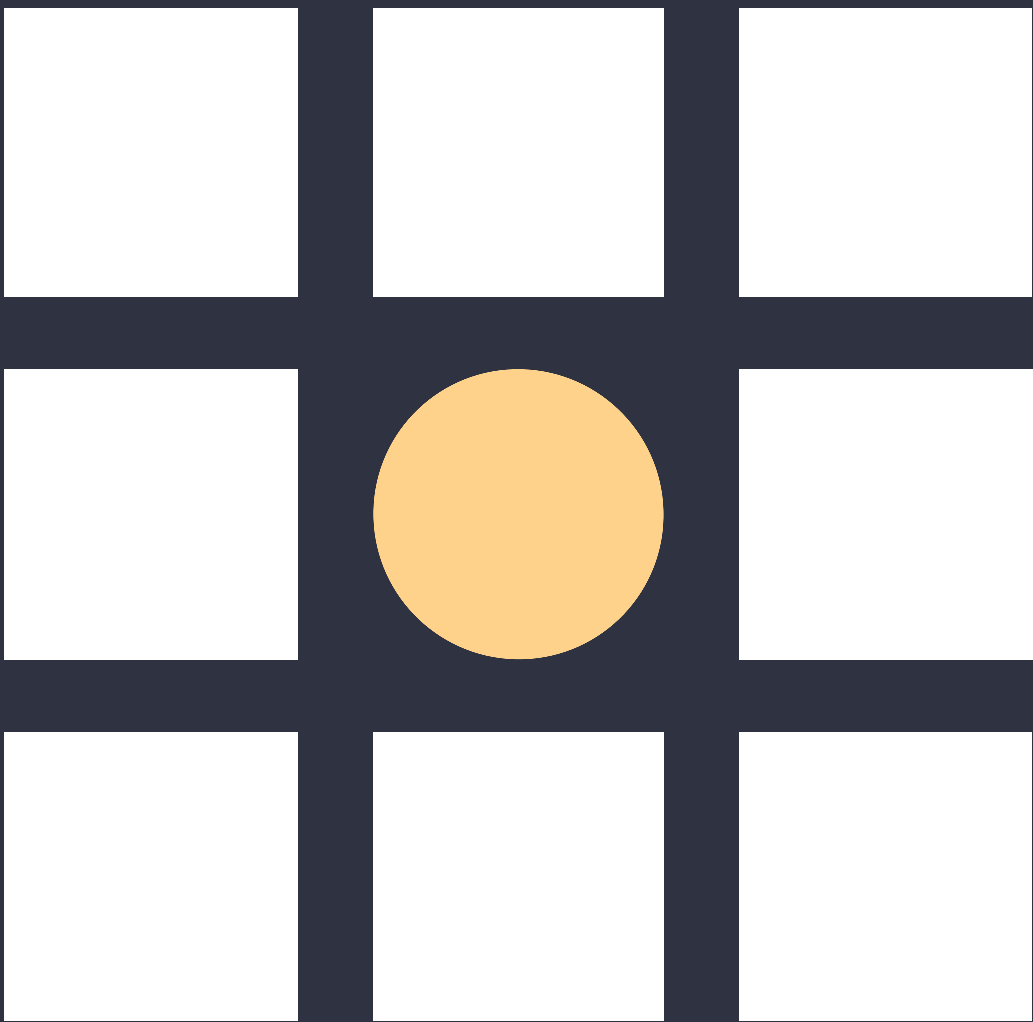
To be or not to be: Sales Playbooks



A White Paper by **RevenueGrid**

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What`s inside

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As someone in charge of sales at your company, you should never stop trying to shorten the time it takes for your team to close more deals.

The best way to move leads through your sales funnel more efficiently is to have a mapped out sales process for your reps to follow. **Enter: the sales playbook.**

A sales playbook acts as a roadmap for your sales reps to guide them through the entire process of closing a sale. From finding a lead to qualifying and closing a deal, a playbook outlines your sales protocols, techniques, and expectations for each rep's performance.

However, a sales playbook does more than that. It makes sure your whole team—from reps to managers and VPs—are dedicated to boosting your team's abilities by selling on the same page.

- What are sales playbooks?
- Why following a playbook is a good idea?
- What does a sales playbook look like?
- How to make sure your team follows playbooks?
- The importance of keeping your playbook updated

Ready to get your sales team on the same page? →

What are Sales Playbooks?

A sales playbook is a document outlining your sales process; buyer personas; call scripts and agendas; sample emails; discovery, qualification, demo, and negotiation questions; proposal guidelines; and/or competitive intelligence guidelines.

In other words, your sales playbook arms your reps with all the content and strategies they need to close a deal

HubSpot

Deals are becoming harder to close, and reps are competing harder than ever before to win customers. On top of all this, sales processes are getting more competitive and complicated for sales reps to follow. Highspot's 2018 State of Sales Enablement Report found that nearly 70% of respondents agreed their company's sales processes were becoming more complex.

A sales playbook can be a team's secret weapon. It documents and streamlines each and every play that has landed great results within a sales team.

With a sales playbook, it's easier to make sure every last rep on your sales team sells in a structured way that aligns with your company's values. However, today's buyers also want a personalized experience. Any structured sales cycle you start using must also be customizable enough to respond to a prospect in a personable way.

If you put processes in place that are too restrictive, they will suffocate your sales rep's creativity—and your sales numbers.

However, if you get them right, sales playbooks can give your company a massive payoff. Research from Aberdeen Group shows that sales teams who've implemented playbooks correctly have had amazing results:

- Best-in-Class companies reported a 42% current adoption rate of sales playbooks
- 72% of the Best-in-Class indicated that "sales playbooks help sellers develop and customize content most appropriate to their individual accounts or territories," compared with 37% and 29% respectively among an under-performing cohort
- Playbook users report 15% more sales reps achieving annual quota, compared to non-adopters

Aberdeen Group says these figures drive home the quantifiable value of adding sales playbooks to the overall suite of sales enablement platforms.

Playbooks should also be wrapped into the fabric of the business... included in onboarding, discussed at sales meetings, used in pipeline management and opportunity management meetings, and in pre-call planning. They need to be coached to.

Mike Kunkle
Vice President,
Sales Enablement Services - SPARXiQ

Here's the catch with sales playbooks: every team sells differently. That's why a sales playbook's most significant benefit is maintaining a level of consistency across your sales team. A sales playbook will give each sales rep:

- A step-by-step process for qualifying leads
- A detailed buyer persona so they don't waste time when they're prospecting
- Scripts for cold emails/calls
- Tips and training on how to use sales tools effectively

What does all that look like?

Outline of a modern sales playbook

The best playbooks will have everything a rep needs to know about the ins-and-outs of your company, along with detailed outlines of **sales plays.**

A modern sales playbook needs to include:

Your company information:

- Why did your company start?
- When did your company start?
- Who owns or manages it?

Your products and services:

- What does your company do?
- What do you offer?
- What is your USP?
- Why does someone need your product/service?

Brand guidelines:

- Is your brand fun and quirky, or serious and professional?

Buyer personas:

- Who is your target customer?

Be specific here, like this example:

1 **Persona Name:**

Sample Sally

2 **Background**

Job? Career path? Family?

- Head of Human Resources
- Worked at the same company for 10 years
- Worked her way up from HR Associate
- Married with 2 children (10 and 8)

3 **Demographics**

Male or female? Age? Income? Location?

- Female
- Age 30-45
- Dual HH income: $300,000
- Suburban

4 **Identifiers**

Demeanor? Communication preferences?

- Calm demeanor
- Probably has an assistant screening calls
- Asks to receive collateral mailed / printed

Sales & buying processes:

- Do you offer a free trial? How long for?
- Is your product a one-off or a subscription?
- What qualifies as an SQL (sales qualified lead)?
    - Where do they come from, and how should sales reps find them?
    - How should reps find a lead's contact information? Do you have specific tools?
- Advice on how to reach a company's decision-makers
- Script to use when calling leads to qualify/disqualify them

Company selling methodology

- Do you use cold emails?
    - Is there an automated process already set up?
    - Are there templates to follow?
- Include any selling scripts for reps to follow
- What marketing tactics are used that a sales rep should know about?
- What is the methodology for each customer interaction? Be specific and outline it for the reps.

Outline every type of customer interaction and then provide specifics for each point

Calls	Demos	Emails
Strategy	Identifying leads' goals	Inbound or Outbound
Goals	Length	Technical or non-tech lead
Content	Detailed walkthrough	USPs and benefits
Talking points	Handling objections	Number of touches & content
Best ways to follow-up/close	Next steps	Personalization tactics

Sales funnel opportunity stages, which clearly outline:

- Identifying a lead
- Determining what problem they have (and how to position your product in solving it)
- Validating benefits and value
- Negotiating deal
- How to close a deal that's won/lost

Tools your sales team uses

- CRM
    - How do they use it? And how can they access it?
    - Do you use any other sales tools or software?
- Sales Engagement, Sales Enablement software, etc
    - What software does your company use to help sales reps to engage customers better?

KPIs:

- Do you have specific targets? What are they?
- How will a sales rep know they're performing well?

Commission structure and payouts:

- What percentage does your sales team earn on deals they close?
- What's the qualifying criteria for a sales rep's commission?
- When will it be paid out?

It's a lot to land a reps with when they first start working in your sales room.

Content in your playbook should be micro-targeted and include supporting materials, but you need to make sure it's super focused on whatever sales play process you're outlining. Because the better prepared your sales reps are, the easier it will be for them to integrate into your sales team.

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Sales Play Template

Example of how a cold outreach play can be written in a sales playbook

When creating a play, specify the following points:

Goals - what are you trying to achieve with this play?

Time - when should each step happen?

Results - how do you measure the outcome?

Tools - what tools are you using?

1 Emails

- Cold outreach templates
- Associated content, insights and reports
- LinkedIn Sales Navigator templates

2 Discovery Call

- Supporting research
- Scripts and talking points

3 Social Selling Tactics

- Platform, frequency of contact
- Graphics and illustrations
- Pre-approved social copy
- Shareable social material
- Other materials suited for social media sharing

4 Follow-ups

- White papers, eBooks, articles
- Collateral materials
- Content for the each stage in the buyer`s jorney

Why following a playbook is a good idea

According to research by the CMO Council, reps spend 40% of their time searching for and creating content to land a sale.

It makes sense that they're going to have more time to sell if that content is already pre-made.

However, a successful playbook shouldn't be created by a single person from your sales team. Each of your reps will have unique ways of selling, and some will have pitches and techniques that work better than others. Which is why creating an effective playbook should include input from team members across the company, including sales and marketing.

If a sales manager knows what works in a specific industry or for a particular client-type—aka they've got "silver bullet"—their whole team should have access to it. Which is why playbooks can be essential to scaling the success among sales team's selling approach.

Playbooks are only as valuable as the line manager and rep are willing to be held accountable to them.

Some plays can be very specific (scripts), other plays need to be treated as an outline.

Richard Harris

Founder - The Harris Consulting Group

The key takeaway: involve your team in the playbook process.

Identify a few key sales team members that you think could take responsibility for overseeing the creation of the playbook. These project owners will ensure that content is delivered on time and that everyone can review and propose edits throughout the process.

For the best results, your playbook needs to be championed from the top: **by your sales managers.**

How / Who	They influence Sales Playbooks	Sales Playbooks influence them
Sales Leaders	• Serve as champions • Provide unique insight	• Drive revenue • Motivate the team • Build great culture
Sales Ops	• Define processes • Improve processes	• Reveal bottlenecks • Show inconsistences
Account Executives **Experienced sales reps**	• Test, follow and report • Keep playbooks dynamic	• Help reaching the quota • Provide coaching • Clarifie complex processes • Establishe workflows
New reps **SDRs** **LDRs**	• Give feedback	• Ramp up productivity • Increase selling capacity • Onboard and train

Playbooks shouldn't take away the freedom of your sales reps

Don't misunderstand a playbook: it shouldn't be used to suck all of the freedom from how your sales reps deal with prospects.

On the flip side, a robust playbook will provide guidance, tips, and structure to a rep's selling strategy without cramping their style. For example, a play designed to create urgency could outline the competitive landscape facing modern buyers for a rep. The play could also give the rep access to content to help them create urgency during a conversation with a prospect.

This could include:

- Email templates that show examples of how to create urgency during prospect outreach
- Calling scripts that other reps have used to create urgency successfully
- Assets for the rep to use during their pitches like:
    - Case studies
    - White papers
    - Testimonials

Then, there will be space for the sales reps to make their own decisions on how they'll handle the overall interaction with their prospects.

What a team looks like without a playbook

A sales team without a playbook runs the risk of selling inconsistently and pulling different results.

Teams will be selling inconsistently

Without a playbook, your reps will all be selling in different ways, and there will be no consistency with how prospects are handled.

One rep will be selling products in a way that's entirely different from how another rep is selling. This isn't a good way to sell to customers, especially if a customer has dealt with more than one rep. It makes your company looks inconsistent and unprofessional.

Remember, it's hard to steer a ship without a clear course. Without a sales playbook, it's impossible to have all your sales reps selling in the same way.

Teams will be selling inefficiently

Do your sales reps know during what part of a pipeline to start closing a deal? Do they know exactly when they should be offering an upsell or a discount?

Without a sales playbook, they're essentially guessing, and potentially missing out on a substantial amount of revenue in the process. Introducing a sales playbook can make sure your reps are selling effectively and at their offers are being made at the right time in the sales pipeline.

Teams will be pulling unpredictable numbers

Without a clear path of what a deal should look like, or how long it should take, each rep will inevitably be pulling unpredictable sales numbers.

Using a sales playbook can fix this. It will help give your reps a sense of what numbers they should be closing, how long an average deal should take, and what's expected of them in their role.

How to make sure your team follows playbooks

For sales leaders and reps, a playbook puts the most important parts of your sales processes in black and white.

They are an unbeatable tool to make sure that there is no misunderstanding about what makes a lead qualified or what your target persona looks like. And because of that, playbooks can help sales leaders create high performing teams who sell consistently.

Once you've built your playbook, it will become:

- A single destination for any processes your sales rep needs help with
- A source of discipline and structure for your managers to enforce in the salesroom

But not every salesroom is perfect, and you **will** be faced with times when your reps miss or skip a play in the playbook. That is, unless, you've got a system in place to help them make every single play.

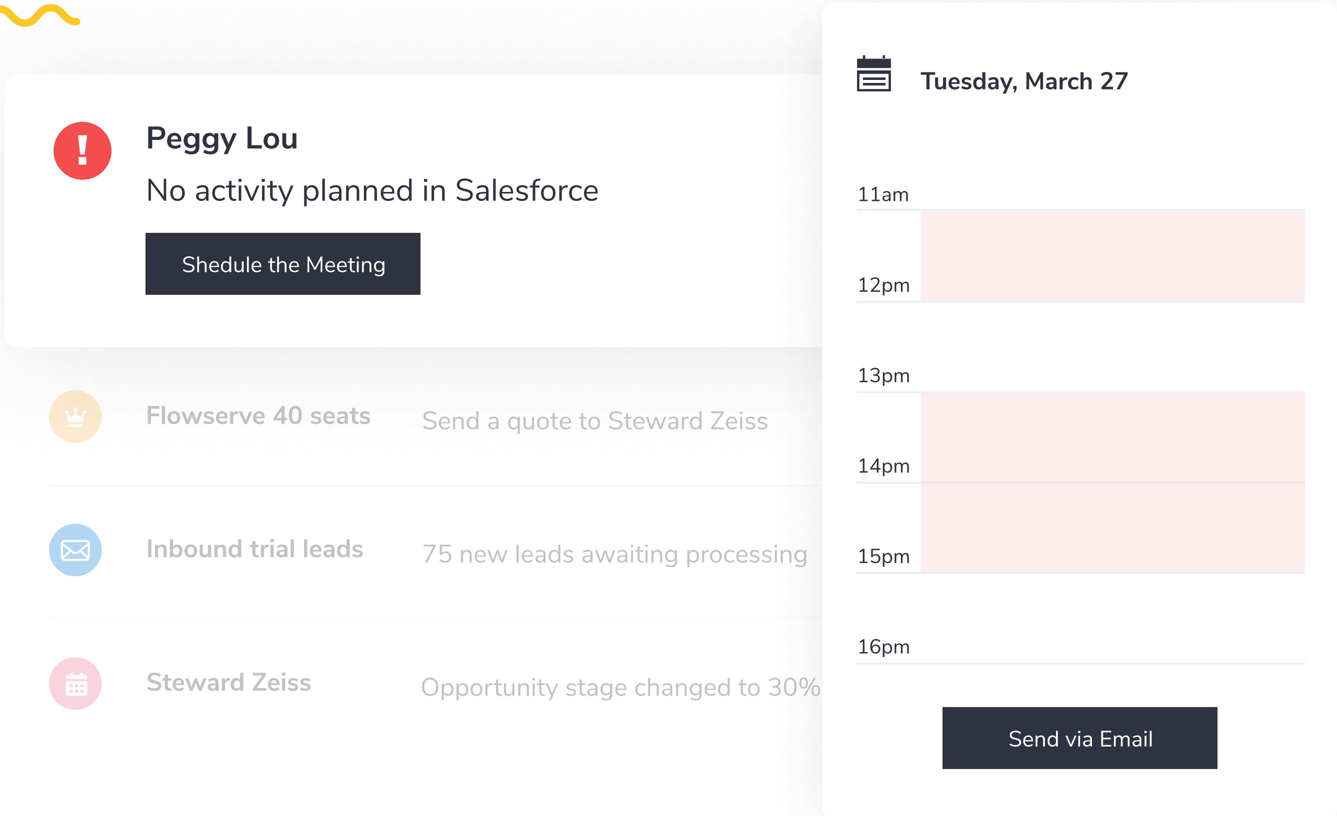
This is how the RevenueGrid team makes the most out of sales playbooks

At RevenueGrid, following sales playbooks comes naturally because we use Revenue Signals. Singals help our reps stay on track with reminders and alerts.

Here's how

Your sales team might be using a single playbook, or several playbooks at once. Talking from experiences, sales managers have enough on their plate without finding the time to track reps to make sure they're following the playbooks properly. And that's where RevenueGrid steps in.

All sales managers need to do is set up a playbook and select the **must-follow** steps of each play. Revenue Signals will then track any deviations and remind your reps if they skipped a step. By giving signals based on activity, your reps will be reminded to follow up with leads in their pipeline, so none of them fall through the cracks ever again.



An example of a Revenue Signal. Reps will be instantly alerted to any essential activity they've missed so they can follow up on it and keep the customer engaged

By now, you know that a playbook isn't about stifling your sales team's creativity and freedom.

And that's why signals are essential. It's going to be impossible for your reps to remember your entire sales playbook from start to finish. With Revenue Signals, your team will be automatically guided to the next play they should be making.

If a prospect is making buying signals, or it looks like a deal is starting to fall through—your rep will be reminded to make their next move

Signals can also be set by sales reps themselves as behavior-based reminders to help them keep track of the most important events in customers' journey and to help them identify leads that are growing cold.

Stay on track with analytics

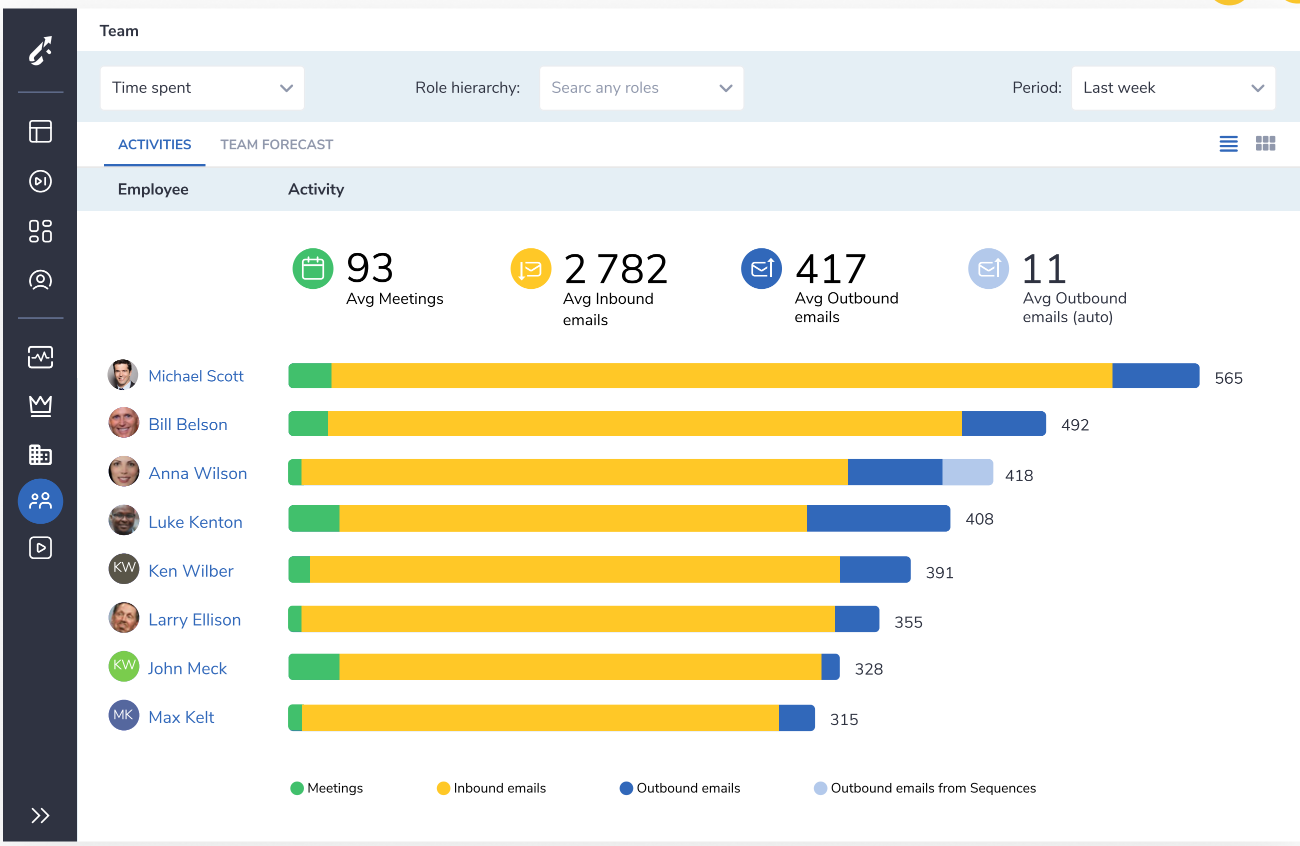
Having a playbook is important. Keeping an eye on how much your team is benefiting from it is also part of the sales and marketing puzzle. So we track how well each play performs, and have powerful team analytics in place.

Tracking analytics gives us key insights into the top performing sales reps. With real data, we get a realistic insight into what our reps need to do differently in order to meet their goals:

- Past, current and scheduled selling activity
- Productivity metrics such as average response times and average number of touches before meeting
- Team performance KPIs

Then, we measure the data against our playbook. Tracking analytics helps you change up your sales playbook and focus on what's important and celebrate your team's winning tactics.

It's the simplest way to make sure your team keeps hitting home runs.



Conclusion

As your company evolves, your sales playbook will need to keep up.

The sales play you used a year ago might not work as well anymore, and your goals might change as you start prospecting to new target personas. Which is why your playbook must be regularly reviewed and updated.

> *You need to make sure your playbook is updated every quarter to keep the plays relevant. However, if a rep comes forward with a new play that's been closing them a ton of deals, adjust your playbook so your whole team can benefit from it*

When a sales playbook is followed and kept updated, it has the power to have a tremendous impact on your revenues, sales efficiencies, and profits. Plus, playbooks help your sales managers onboard new reps faster with more effective training and skill development.

Want to give your team the unfair selling advantage?

REVENUEGRID

Start using Playbooks with RevenueGrid now

and see the results today

See it in Action

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