salesplaybook.pro

How to develop your own Sales Excellence Playbook

The Most Complete Guide on Sales Playbooks

Imagine how much can be achieved if every B2B Sales team is able to rely on proven and effective sales strategies built specifically for them

Yuri van der Sluis
founder of Salesplaybook.pro

Contents

What is a Sales Playbook?

A Sales Playbook is a cornerstone of any successful sales team.

It contains easy-to-understand, practical advice to guide your entire team through each step of the selling process, providing them with comprehensive best-practices that lead to consistently great results.

From engaging with customers and pitching to perfection to making on-the-spot decisions and closing difficult deals, a truly great Sales Playbook unlocks potential at every level of your team: it helps them sell smarter, faster and better, to produce bigger orders and better conversion rates.

Of course, such a Playbook takes real time and effort to put together. A truly great Sales Playbook is never generic – that would render it irrelevant. Instead, it must take into account every aspect of your market; your product or service; your long-term strategy; and the kind of team you want to build.

To do this requires real expertise and plenty of guidance. And in this guide, we're going to provide you with both. But first, we're going to convince you why it'll be worth your time, by showing you The Top Five Reasons Every Sales Team Needs a Playbook…

1. It Creates Consistency Immediately

There is a huge gap between what sellers 'think' they do and what they actually do. When every member of a sales team has a different approach to selling, every lead will be generated and followed up in a different way: this results in confusing messaging, disconnection with the customer and ultimately a decrease in the chance of a sale.

By providing a consistent and universally accepted methodology, a Playbook avoids this disconnect and improves the whole team's sales performances. But there's more: having established a consistent approach across the entire sales team, new strategies and sales tips can be easily recognized, introduced and implemented by the team. These small tips and tactics can have a huge impact on sales results.

A Sales Playbook allows the top 5% of sellers to pass on their best advice and wisdom to the rest of the team, closing the gap between the best and the rest, and bringing the entire sales team up to the next level.

"A Sales Playbook is the best way to help marketeers align with sales so can you reach the highest conversion of quality leads"

Brahim Samhoud
CEO BNZSA

2. It Develops Teams Quickly

To sell effectively, a sales professional needs to believe in themselves: they need to exude pride in what they do and confidence in what they sell.

A Sales Playbook allows a team to communicate and understand each other more effectively by giving them a shared language; it helps individual sellers feel confident and safe, knowing they're using a method of selling that works. This creates a feedback loop of positivity and common purpose, making their sales efforts far more effective.

And it helps grow the team quicker, too. In a competitive environment, how you onboard is crucial, and directly influences the success of new sales hires.

To unlearn poor sales engagement techniques is a lot harder than to learn the proper way to sell: rather than learning on the fly or stumbling about trying to imitate their colleagues, a Sales Playbook helps the new hire ramp it up at pace, by providing a clear, precise guide to the team's sales process that they can simply learn and implement immediately.

On average, new sales hires spend 10 weeks in training and development and only become productive after 11.2 months according to the Sales Management Association (SMA).

3. It Scales Management Efficiently

No matter how talented, managers simply can't be everywhere at once: their span of control, as the sales team grows more dispersed internationally, is put under severe pressure.

To constantly be guiding sales professionals with advice on best practice becomes not only highly inefficient, but also ineffective: the manager gets stressed, the team gets confused and the sales performance gets considerably weakened.

A playbook solves this problem, and helps management scale properly as the team grows. The Playbook ensures the entire team knows what is expected from them, and provides them with the tools that will help them to deliver it. Which leaves management free to focus on new challenges, bigger strategic questions and providing support to the team members that really need it.

93% of world-class sales organizations say their management team is highly effective in helping advance sales opportunities. But only 47% of average sales organizations say the same (MHI Global).

4. It Allocates Resources Effectively

In a world where distractions are ubiquitous, sales teams and their management need to be vigilant.

Social media and messaging services, coupled with the potential of wasting time on ineffective prospect researching and the numerous other operational activities they are responsible for, mean that sales people are forever at risk of mismanaging both their time and priorities. And there are real costs to this: according to one estimate, 30-50% of sales go to the vendor that responds first.

So simply not being ready when opportunity strikes can result in missed targets and dwindling sales.

A Playbook avoids this. It provides clear guidance as to how team members should allocate their time and how to prioritize customers and deals; it instils in them a sense of purpose and makes sure everyone is clear as to what their role is.

Plus it helps management: because the process and methodology is consistent, the sales performance data generated can be analyzed more effectively. Meaning management can more easily understand what needs to be focused on and how to improve results.

"Today's sales professionals spend just 34% of their time selling. Sales teams struggle to keep up with data entry, quote generation and other tasks that take them away from customers. Unsurprisingly, 57% expect to miss their quotas this year" (SalesForce 2019 State of Sales Report).

5. It Improves Sales Performance Immeasurably

Ultimately, we all know sales comes down to the bottom line: how much have you sold? Have you hit your targets? The world of sales is filled with 'advice' and 'thought leadership', with people telling you they know the 'best practice' that will help you shift your stuff. But in reality, the only thing that matters is whether or not it works.

A Sales Playbook is a compendium of real, earned knowledge about the sales process that is completely specific to your team's needs and your team's experience. Nothing will ever beat the experience, insight and intuition of someone invested in the real on-the-ground process of selling your product or service.

And because of that, a Sales Playbook is the most powerful way of improving sales performance. Rather than looking to gurus or trying to wing it, your sales team will be able to come back to the real, proven guidance stored there, and use it to drive their sales performance like never before.

"Having a Sales Playbook has facilitated a much more streamlined sales process, directly resulting in shorter sales cycles. I should have done this from the beginning."

CEO of a recruitment firm

Now you understand why you need a Playbook, we can get going with how you're going to create one. In the rest of this book, we're going to walk you through the entire process, step-by-step, with no detail spared, so you have everything you need to create a truly game-changing Sales Playbook.

But before we start, it's important we cover the Six Basic Principles which every great Sales Playbook needs to adhere to:

Principle 1: Inspire

Inspiration is everything: however much effort you put into creating your Playbook, if it doesn't capture the reader's imagination, if it doesn't engage them and make them want to read and learn, it will all be for nothing. The best way to achieve this is to make sure you feel inspired while you create it: take the passion you feel for the craft you're describing, and distill it in your Playbook so that it infects every member of your team.

Principle 2: Attractive

Content is king, of course. But as a sales professional, you understand that how you present things matters too. And nobody is going to get to the incredible content you produce if you present it in an unappealing way. So put in that extra effort to really make a beautiful, impressive looking Playbook: it will be more than worth it.

Principle 3: Up-to-date

A Playbook is only as good as the information it contains. It is absolutely critical, therefore, that you consistently update and upgrade your Playbook with new ideas and insights. It should be like a living organism: forever growing and improving.

Principle 4: Relevant

Your Playbook is going to be long; it's going to require time and attention from your employees. And for that reason, you need to reward them for their effort by ensuring everything is totally relevant to their day-to-day Sales work. It needs to be filled with real-life examples and directly actionable insights, so that the reader feels they are getting real value out of reading it.

Principle 5: Easy-to-understand

Sales content can easily become too theoretical, abstract or complicated. But people only put into action what they remember, and they only remember what is simple and direct. Your Playbook is going to be used on-the-go during real life situations: you want to ensure that there is no waffle and no needless jargon, so that employees can quickly access the information that they need.

Rule 6: Complete

Finally, it is incredibly important that your Playbook is complete. Now, this might sound obvious, but the reality is a great Playbook takes a lot of time and effort to produce; lots of people give up or get tired and wing it. It needs to be so comprehensive that your Sales team will consistently turn to it when they need advice or guidance. And to make that happen, you need to make sure the thing gets finished!

So with these rules in mind, we can finally begin. And as with any good sales effort, the best way to begin is by introducing yourself properly…

Chapter 1

Introducing Yourself

Introductions are important: they set the tone for the entire rest of your relationship. The introduction of your Playbook is the one chance you have to make a great first impression: if you get it right, your reader will be hooked; if you get it wrong, you may have lost them for good.

For this reason, a great Playbook begins with a strong, passionate, inspiring introduction: it should introduce the reader to both the company and the sales organization itself, and it should make sure the reader is hooked from the get-go.

Introducing the Company

A Playbook should powerfully captu re exactly what makes your company great: its story, its purpose, its essence. You need to validate your sales team, make them feel they have made a great decision joining the company, that they are part of something important and special.

Part of this is playing into their self-interest: every new hire wants to believe that their career is on the rise, that the company they are starting to work for is going to grow in the coming years and that their career will grow along with it. Tell them how your market is growing, how the company plans to expand: this will get them excited to make their mark on the team.

But there´s more: people need to feel they are doing something meaningful, purposeful. You need to convince your reader from the get-go that the company believes in something and invests in its people:

What is the purpose of your company? What is the story of how the company came to be? Capturing this sense of purpose will help your reader believe in what the company stands for; that belief will in turn help them inspire your customers to believe too.

Ultimately, it is an emotional connection you want: by engaging the reader´s emotions, you allow them to channel their own ambitions, values and desire to grow into the company. If you can make them really care about the company, they will be more dedicated, more enthusiastic and better at their job down the road.

Put simply: **make them believe in their career progression, care about the company and understand its purpose.**

Once the company is properly introduced it is time to talk about your sales organization.

Introducing the Sales Organization

It is important that sales people feel they belong to your sales department, that they feel connected and committed. Just as a company needs loyal customers that keep coming back and making more purchases, a company needs loyal sales people that give everything they've got to beat the competition and create highly loyal and profitable customers. For this reason, how you introduce your sales organization is incredibly important.

First, ask the questions: what are you all about? What is your ethos? What kind of culture do you have? Sales is the heart of a company: without it, the company will perish. You need to capture that urgency, make sure the reader understands how important sales is for your organization; they need to understand quite how pivotal their role is, how much responsibility and power they truly have.

Sales can be done in a lot of ways. The philosophy, values and how you deal with customers is something that must be clearly communicated so that it can be implemented and nurtured. Make sure it is very clear what selling in this company is all about: emphasize exactly the kinds of behavior and choices you like to see, and exactly what kinds of poor habits and wrong techniques you must avoid.

And finally, you need to be direct and clear about the objectives of your sale organization. While many sales people are brilliant as individuals, it is how a team functions which ultimately predicts success. Therefore, you need to inspire each reader to feel like part of a team, to understand the targets you have and inspire them to work as hard as they possibly can towards your goals.

Put simply: make them **feel like part of the team, understand how your organization sells and feel inspired to beat their targets.**

And now that everything is introduced, we can start looking at your value proposition…

Chapter 2

Your Value Proposition

It is always important to have a clear, concise overview of the main products you sell in your playbook. Doing so allows your sales team to become very quickly acquainted with which products or services they can actually sell, as well as providing them with a general overview of product type, description, pricing levels and USPs to use on the fly.

By including this in your Playbook, you have the opportunity to share different, more nuanced selling strategies for each individual segment. For example, strategies can differ depending on the complexity of the product or the length of the buying cycle; without differentiation, your sales team will treat each opportunity as the same, which will inevitably lead to lower conversions.

But you need to include more than this.

When your sales team is interacting with customers, what kind of things do you want them to be talking about? Do you want them to simply listing off generic product information or marketing copy, as if the customer couldn't find all of that by visiting your website?

No, you don't. You want a natural, spontaneous conversation where your team's sales talents can be put to use by explaining to the customer how their specific business could be improved.

For this reason, you need to include more than just the main products you sell and their USPs: you need to make sure your readers understand the actual value and impact you create for your customer.

This value lies in both reducing or eliminating problems and at the same time improvements you bring with your solution; together, they represent the total value of what you bring to the table. In your playbook you want to make sure that your sales people are fully aware of the problems they need to look for in the market, so urgency can be uncovered and created for your solution. List all these problems, together with statistics and examples so it is easy to understand and to address them with potential customers.

This will not be a generic endeavor. Instead, it will have to be tailored to fit your specific customers and your specific market. Which means your Playbook needs to offer detailed descriptions and analyses of both, starting with a full explanation of the market that you operate in.

Chapter 3

Your Market

When you communicate the specific market you operate in, you are positioning your company: it impacts how new business is generated, how leads and opportunities are qualified and managed, and how your competition is viewed. This in turn affects how your sales team views your company, and how they represent it to the outside world.

It is therefore incredibly important that your Playbook includes robust information about the market you operate in. This can be broadly split into market insights and market trends.

Market Insights

Market insights are essential to contextualize and make sense of the often-complex ins-and-outs of a market.

- What are the key characteristics of the market you operate in?
- How big is this market and what is its growth trajectory?
- What have been the key developments and what is projected for the future?

This context helps sales people to better understand the field they operate in, and therefore more confidently navigate it.

Market Trends

Market trends are key developments in a marketplace that have global implications, effecting the entire market in ways which are often highly volatile and difficult to predict. This might include changing consumer behavior, macroeconomics shifts, major business events or technological advancements. Maintaining an up-to-date guide to such things empowers your sales team with a properly rounded, global perspective, and helps focus the team in a particular direction.

The knowledge these market insights and trends instill in your sales people can be used to:

- **Impress prospects and clients:** By sharing their knowledge, your people will demonstrate their expertise, both stimulating trust and building authority
- **Understand new product initiatives:** New Product Roadmaps or strategic choices by the board can be more easily understood and quickly adopted by knowledgeable, engaged employees
- **Get inspired and feel pride:** Feeling that the company is on the right track emphasizes for the sales person he is part of the winning side.
- **Understand why now is a big opportunity:** Building for the long term is good for sustainable growth, but understanding that the window of opportunity is limited creates a sense of urgency, which is required to speed up business.

Chapter 4

Your Customers

"Show me your friends and I can tell you who you are. Show me your customers and I can tell you what company you are."

Yuri van der Sluis
founder of Salesplaybook.pro

You are defined by your customers. This is true of your company in general, and your sales organization in particular. Knowing who they are, how they think, and how they operate is absolutely pivotal to successfully sales. And in order to be truly effective, your Sales Playbook needs to reflect this.

Of course, there are many complex elements and aspects of your customers, and offering easy-to-understand, actionable insights into them requires very clear thinking and a thorough process. Therefore, in this chapter we will break down how to understand your customer into six separate parts: who your main customers are; creating customer success stories; your Ideal Customer Profile; customer segments; customer personas; and your customer's buying process.

This will allow you to go through step-by-step, everything you need what to include of your most important source of income: your customers.

Who are your Main Customers?

Your main customers are those who you pay most attention to, the ones who provide the greatest value to your company. What kind of customers are these? How much and which products do they buy from you?

Having a clear vision of this instills pride, confidence and a sense of identity in your sales team: they will feel validated that there is a place for what they are selling in the market by understanding which and how many customers are being served and the value your company provides for them.

Creating Success Stories

When your sales team approaches new customers, they can't only bring facts and figures to the table: they need to be able to engage these new customers emotionally and inspire them. Stories help us connect on a deeper level, making simple information come alive in an exciting way. And by bringing your customer stories alive, you can help create opportunities, speed up sales cycles and even close deals.

We have a simple formula to help you create effective customer success stories – it will ensure that they are as inspiring and engaging as possible:

1. Define an attractive transformation, with a clear and appealing Before and After.
2. Share key characteristics of the company (e.g. sector/size/location)
3. Describe the Before situation: what was the main challenge/problem they were facing?
4. What solution was chosen and how was it delivered?
5. What was the result after implementation? What was the major change compared to the start of the story?

The best part of this, is now your team is able to tell these stories to new customers: they will be able to choose the right story based on common characteristics. The right story will inspire prospects, generate empathy and create a powerful connection.

Idenitfying your Ideal Customer Profile (ICP)

Who is your customer? Some people answer this with: 'whoever wants to buy!' In this answer lies more danger than you realize. If you are trying to sell to the wrong customer, you risk the customer:

- Not being able or willing to pay your price; wasting your valuable, limited sales time; or forcing you to lose margin without much upside
- Not using the product/service in the way it is intended, therefore taking value out of your proposition and risking that they leave as fast as they came on board
- Spreading the knowledge across too many geographies, sectors and segments, resulting in poor guidance in the buying process

By defining your ICP, you will get a clear picture of what kind of company in what kind of situation is ideally positioned to be your customer. This customer profile is ideal when:

- Their problems can be solved with your proposition
- They gain the most benefits out of your proposition
- They are be able to grow as an account to obtain more products and services from you
- They are willing and able to pay your price without too much objection
- They can act as a reference
- They can attract more customers with similar characteristics

Your ICP is the absolute best fit for your proposition, your culture and what your company stands for. The market is big and competition is fierce; defining your ICP helps you save time and allocate energy and resources to those companies with the greatest sales potential. And not only will your chance of converting your ICP be higher, keeping your Customer Acquisition Cost (CAC) low – they are also more likely to grow into loyal customers long term, boosting Customer Life Time Value (CLTV).

Defining your ICP begins by dividing your market into smaller portions, and analyzing every aspect of these smaller portions. Below are five questions to help you define the ICP:

- What market dynamics should they experience, whereby they are willing to invest more to solve it?
- Which specific problem that your client faces creates the biggest need for your specific solution?
- What phase should your client be in, that they are perfectly positioned to work with you?
- What should their financials be, in order to evaluate your solution properly?
- What should their experience ideally be in working with your type of solutions?

Customer Segments

Your Playbook needs to include each of the key customer segments you focus on: this might be defined by sectors, sizes and/or geographies. This is especially important if your company is exposed to several markets:

It helps you to better organize your sales and marketing efforts and better allocate time and resources.

Customers can differ in many ways. For example:

- Size: SMEs buy completely differently compared to multinationals
- Culture: companies in Southern Europe expect a different sales approach compared to companies in the UK
- Relationship: project customers buy differently compared to long term customers with annual commitments
- Sector: companies in the Financial Services buy differently compared to companies in Retail

It is important to remember: recognizing these differences is only relevant and useful if you use it to help organize and manage your sales department. When you have defined your customers into specific segments, you can:

- Divide your sales along those customer segments, so they can acquire a deeper understanding of specific dynamics
- Vary in lead generation and marketing initiatives, to address segments more personally and increase conversion rates
- Adapt your collateral, messaging and sales approach, so you are in greater alignment

Your Buying Personas

Buying personas are all the people that play a role in making a purchase. They are part of the buying committee (DMU), formally or informally. In the vast majority of B2B purchases, there is a buying team involved - rarely does a single person reside over such large scale buying decisions. In fact, according to Gartner, at least 7 people are involved in making the average B2B Purchase – and this figure jumps to 13 people for B2B purchases of over $5mln!

This means it is essential to understand your buying personas and be able to influence them; your Playbook should therefore dedicate plenty of space to describing them.

There are numerous areas to consider when describing your buying personas. For example:

- Management level
- Department
- Level and type of responsibilities
- Goals, project & interest

B2B sales is very different to consumer selling. In the consumer space, a lot of noise is made about understanding what cars the consumer drives or what hobby they might have; in B2B Sales, such personal matters are far less important. B2B buying personas are chiefly defined by what business materials they read; what kind of business they operate in; what events they go to; which industry experts and gurus they trust.

Understanding these things will help your sales team in a number of ways. It will help them:

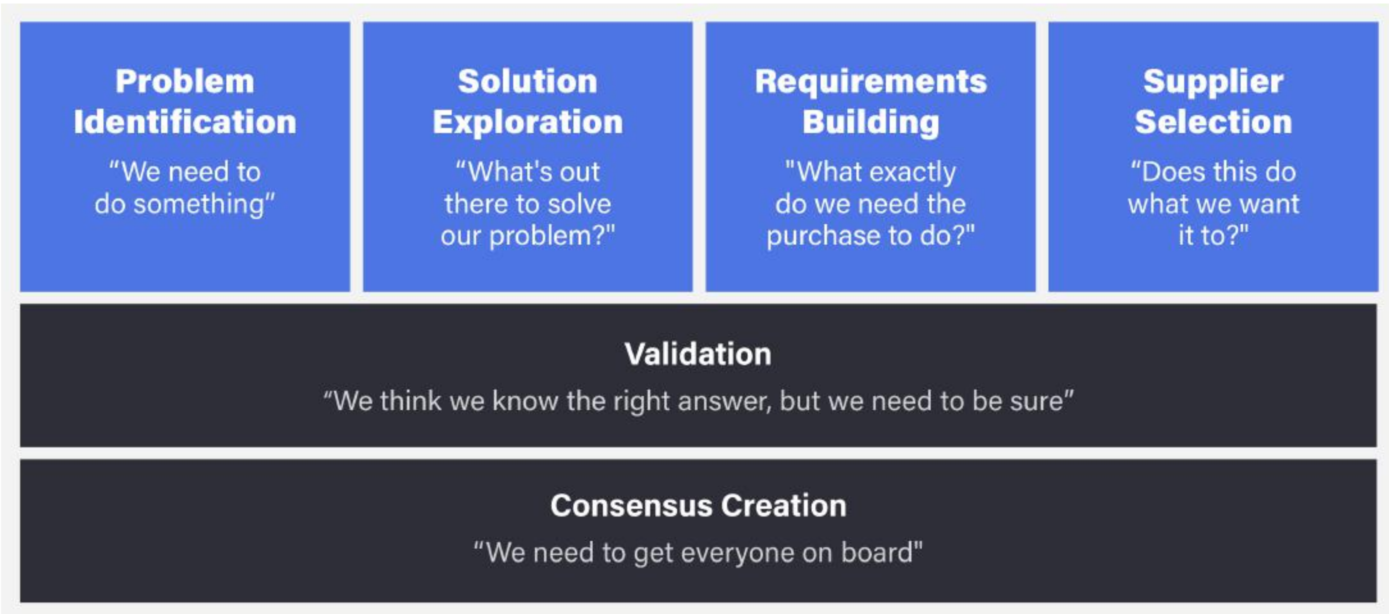
- better understand personal goals, ambitions and challenges
- better prepare and customize messaging and dialogue
- better empathize
- better strategize around dealing with complex group buying behavior
- better recognize common patterns
- improve analysis & evaluation of buyers

Your Customer's Buying Process

The best way to sell, is to understand how and why your customers buy. And while all people and customers are unique in some ways, there are in fact many common steps customers routinely follow. By discovering the common steps your specific customers go through and describing those steps in your Playbook, you can help your sales people guide their customers better and more effectively through them.

A great way of capturing these steps is to interview your best customers: this helps you get a better understanding of the process they go through internally prior to making a decision. When you do this, you need to:

1. Define the main buying steps
2. Describe what customers require per step prior to moving forward to the next step
3. Divide these requirements into what they need from you and for internal purposes



As the Gartner diagram shows, creating validation and consensus heavily influences the chance of successful selling. If your sales team understands this buying process and are conscious of it when working, they can guide customers more effectively and prevent them from failing to internally validate the investment, drastically increasing the chance of making a successful sale.

Chapter 5

Your Competition

Competition is important: if you don't know your customer's alternatives, you will always be one step behind. To be willing to buy from you, your customer must accept that they have a problem which is big enough to invest in, and they must believe that your approach is the best way to solve it. But this alone isn't enough to seal the deal:

in order for you to make a sale, your customer must also be convinced that your solution is better than other, similar ones.

Understanding your competition will help your sales team make this happen: it will help them strategize more effectively, and position your product or service intelligently to create a competitive advantage. Your Playbook, therefore, should include plenty of information about both your direct and indirect competition.

Outline Your Competitors

The first thing you need is a clear, direct rundown of your important competitors and the most salient information about them. This will include:

- **General information:** the location(s) they operate in; their financials; website; pricing; and the number of employees they have. This should be continually updated so your team is always one step ahead.
- **Their most important customers, projects and references**
- **Their product road map and future plans**
- **Their strengths and weaknesses**

With all this information readily available on-the-go, your sales team now knows more about the alternative solutions customers and prospects may look at. Next step is to make the right choices about how they position your solution against your competitors.

Create Competitive Positioning

Competitive positioning is all about how you present your company: what makes you the best option? How do you differ to your competitors? Why should a customer choose you? Much of this is about messaging, and framing your strengths and weaknesses in the most appealing way possible.

For example:

- You are not a 'small company': you are **agile** and **flexible**
- You are not a 'big company': you are **reliable** and **stable**
- You are not 'cheap': due to your company structure and low overhead, you can be more cost effective than others
- You are not 'expensive': due to your level of customer service, your customers get more out of their investment than others

By reframing yourselves in this way and keeping in mind your competitors, you create a clear, distinction for the customer to let them know you are offering the most attractive solution.

Detail Competitive Strategy

Every type of business and market can apply their own type of strategies, since there are countless of way to outsmart your competition. But there are a few constants: every strategy you detail should take into account one of your direct competitors, and every strategy should involve either emphasizing your strengths, exposing your competitors weakness or both.

Here are a few examples of such strategies:

- **Your competitor doesn't have a great reference client in your customer's industry:** you discuss the importance of having experience in their industry and you make sure a reference visit will become an integral part of their evaluation process, knowing your competitor will look weak
- **You are the only company that offers an integration with your customer's system:** you discuss how much time they save and all the business benefits of faster implementation
- **You know your competitor is strong in complete outsourcing:** you make sure the risk of dependence on a single supplier is emphasized and magnified. You do this by subtly connecting your customer to a reference where a single supplier experience went terribly bad - maybe even that same competitor

Having a collection of strong, proven strategies to reference in any given scenario will make sure your sales team always knows how to create a competitive advantage. And why is that important? Because it helps them meet their targets…

Chapter 6

Targets & KPIs

Performance must be measured: any good sales team knows this. But what specific metrics you use, and what kind of targets you set, both seriously affect the outcomes you get. Individuals need to understand exactly what is expected and what they need to focus on; teams need to have a goal to persue beyond their individual efforts.

Your Playbook is the perfect place to put this information, so that no one is ever uncertain as to what they are being measured on or what they need to achieve. You should separate these into two sections: targets and KPIs…

Targets (desired output)

As a sales leader, you have the ability to influence what kind of customer contracts will be signed. You can specify targets in many ways. For example:

- Order Intake
- MRR (Monthly Recurring Revenue)
- ARR (Annual Recurring Revenue)
- Focus on specific products/services
- New business vs. customer growth
- Customer churn %
- Customer satisfaction %

KPIs (desired input)

Key Performance Indicators are the measures of an individual sales person's performance. Many Sales Leaders find it difficult to set and share KPIs since they would like to avoid micro management; they also fear their employees will try to 'game the system' and focus on their KPIs at the expense of other important aspects of the job. But the downside of not having KPIs, is that when sales people underperform, it is hard to measure and identify where the true problem lies. And if you can't identify the problem, it's impossible to solve.

If you rely on the personal perception of the sales professional, you lack the ability to reflect, confront or challenge them: this limits your ability to improve their performance. Sales professionals love KPIs if they are properly communicated and used in a positive coaching manner.

Examples of KPI include:

- # emails, calls
- # demos, meetings
- # presentations, proposals

When you start measuring these KPIs, you have the ability to analyze an individual's conversion rates. This data allows a greater level of insight for the sales person, and allows them to reflect on how to improve. Usually, this will involve increasing activity, improving their process, or a combination of both. But there is no one-size-fits-all solution: by measuring KPIs and having an open dialogue about them, you can help an individual sales person understand how to further optimize the process and maximize their performance.

Chapter 7

Sales Strategy

A heavily underestimated part of enabling sales people to be successful is implementing a carefully crafted sales strategy. Having all the ingredients in place helps the sales people to carry out their jobs well, but nothing more; an actual sales strategy is sales enablement at a whole different level.

Sharing sales strategies in your Playbook will give your sales people continual access to this level of sales success, and provide a reference point when they're in the field. Below you will find a few examples of the kinds of sales strategy you can include:

- ## Land and expand

B2B sales decisions can take a long time: the bigger the deal size, the higher the level of competition, the bigger the DMU and the more politics involved. This means your chances of closing a deal are lower and the length of time closing a deal is longer. To start small and build from there can be an easy way to work your way into strategic accounts. This is also known as 'land and expand'.

- ## Piggy Back Riding

Sometimes, you don't have the right connections to make a sale. Instead of giving up, you can 'piggy back ride' by partnering up with other companies that do have access to the executives you need, and who can benefit from your value proposition. This partner then opens up their network, saving you time and increasing conversion rates

- ## Big Bang

Occasionally, you don't have to begin establishing a new relationship slowly with a pilot or POC (proof of concept). Instead, if you are a recognized thought leader within your field, are offering compelling business benefits which trump the existing suppliers, and – most importantly – have access to the right individuals, you can implement the 'Big Bang' strategy. This means that you embrace an all-or-nothing approach, and try to make a very large sale directly to C-level decision makers. While this can be a more difficult sell, it also produces far greater rewards.

Chapter 8

Lead Generation

"Just by taking a close look at the flow of quality leads you can predict how healthy your pipeline will look like"

Yuri van der Sluis
founder of Salesplaybook.pro

Lead generation is crucial to any sales team: it is new business that ensures a business's growth, compensates for customer churn and justifies the existence of the sales organization.

It is vital to determine where leads come from and how to properly manage them: the quality of this process will directly affect the chance of converting the lead into a real business opportunity. And your Playbook needs to reflect this.

It should describe the entire lead generating process, providing the best practices on how to engage with leads; how to qualify them; and how to convert them.

Lead Generation Process

Whether you are dealing with an inbound or outbound lead, you should follow the same process as much as possible. Every organization will have different needs in terms of generating leads, so you need to determine the best process in your organization with the following in mind:

- **Determining the different steps a lead should go through:** focus on maximizing interest and capturing as much information form the lead as possible
- **Determining how long it should take before a lead is picked up:** the longer it takes, the lower the chance of closing the deal, so ensure a speedy follow up
- **Determining how leads should be qualified:** what leads should be unqualified? You need to determine the criteria for when leads are handed over to the sales executive. When leads are not ready to speak to a sales person yet, it could make more sense to nurture the lead before handing it over.
- **Implementing sufficient checks:** prequalify as much as possible, in order to save costly sales time.
- **Determining how leads should be assigned:** specific sales people will have greater experience with particular kinds of leads; you can maximize efficiency and effectiveness by assigning a lead to be followed-up by the right sales person

Lead Follow-Up

How you speak with a lead is crucial: how you are perceived directly affects your chances of success, and how you are perceived is heavily influenced by first impressions, so making immediate positive impact is crucial. The playbook should contain enough guidance to help the sales person to:

- Pitch propositions effectively
- Determine which phase the customer is at in their buying journey
- Understand the level of interest and the business issues that need to be resolved
- Understand the level of experience required to acquire your product/service
- Determine the potential scope of a project or business opportunity

Chapter 9

Sales Process

Process is the backbone of any sales organization. Organizations that have not clearly defined their process will always lack control of the opportunities their sales people are managing.

If sales people don't know exactly where they are going or what to do, most customers take back full control of their buying process, leaving your sales team out of the loop. Sales should be a game of control, not a guessing game.

Your sales Playbook therefore needs to include a clear, easy-to-understand breakdown of the full sales process; for some organizations, this will involve officially outlining and designing their process for the very first time. When you are designing your sales process, you need to ensure:

- it aligns with and empowers the customer's buying journey
- it is balanced and gives weight to every part of the process
- it increases the chance of sales and helps your team's performance improve

For each phase, you will need to determine:

Actions

You can share what you expect from your team at each stage, from need analysis and presentation to proposal and negotiation. This should reflect in CRM and supported templates and content. For example, during negotiation it should be clear: what is negotiable; what type of order form should be used; and how it is supported in CRM.

Qualification Criteria

Qualification isn't something you only do in the beginning during the lead stage or the first conversation you have with your prospect: you are constantly qualifying throughout the sales process. Your Playbook should share with your sales people what exactly to qualify in each step: for example, you may not qualify on budget before you give the first sales presentation, but you may like your sales people to qualify before you send out proposals.

Objectives

What are the main objectives at each stage? Not just what sales people should do, but also what they are supposed to achieve in each stage. When is that particular stage considered successful?

Requirements & Commitments

Your R's and C's are vital to know: you want to protect valuable sales time as much as possible, and stimulate customers to show forms of commitment. You need to define what sales people should capture and have achieved at each stage prior to moving forward: for example, at certain stages it is easy to move forward, whereas during others you require C-level exposure before proceeding in the sales process.

Chapter 10

Onboarding New Customers

"You don´t close a deal, but start a relationship"

Yuri van der Sluis
founder of Salesplaybook.pro

Sales people celebrate when the deal is done; customers however start celebrating when implementation is completed or the product/service is delivered. Between these two instances is the all-important onboarding process. This is absolutely pivotal for forming a strong, long-lasting relationship with the customer.

The ultimate goal is for you to make active ambassadors out of your customers. How you onboard new customers will shape their perception of your company. Therefore a proper onboarding is crucial to make sure trust and a positive expectation is well maintained.

Your playbook should cover the steps for properly onboarding new customers, to ensure the sales executive and the customer success manager are in sync, and each new customer experiences a seamless and smooth handling of the product or service that is signed for.

Your playbook needs to cover:

- How the onboarding process should function
- Which information is required to ensure proper general information, implementation/delivery, admin and logistics - everything important that is not covered during the sales process.
- What to cover regarding customer expectation, definition of success, concerns and requests.
- These should all be addressed beforehand to avoid confusion or misunderstanding.
- How to introduce the team that the customer will be working with, so the customer knows exactly when and who should be approached for what
- What the customer can expect in terms of working together, process, tools and communication

Chapter 11

Customer Success

"A satisfied customer is the best strategy of all"

Michael LeBoeuf

You can call it farming, relationship management, or success management: the essence remains the same. Customer Success involves keeping and growing your accounts with dedicated focus and attention.

Your Playbook should therefore cover some of the basics of Customer Success, so that the playbook is not only meant for your new business team but also the customer success managers.

The following customer success elements should be covered in your Playbook:

Your customer success philosophy

What is your customer success philosophy? This greatly determines how customer success managers view themselves and how customer success management ties into the overall business goals. Getting this right will help ensure your customers feel appreciated and welcome.

Your customer support strategy

What is your support strategy? How can you ensure customers are not only satisfied but also successful in utilizing your product or service? Satisfied customers who also have a great experience working with you will become the most loyal customers and valuable ambassadors: customer success is not only about keeping churn low, but also about growing your most valuable accounts.

Contact Strategy

What is your contact strategy? This is how you determined how often you call/visit and communicate with customers. Providing support when customers have questions is good, but that is only reactive; proactive customer success helps customers to grow with you and feel that you are a partner in their journey of growth - not just a supplier of services or products.

Large Account Planning

When you are dealing with key accounts that reflect a good percentage of your business, it makes sense to include large account planning in your Playbook. You can share your account planning template in the playbook so it is clear that customer success managers have certain key accounts that require a unique and individual approach, with an individual financial target attached to them.

Cross-and-upselling

Managing relationships is nice, but customer success management is much more than that: it is the key to growing your accounts and identifying new opportunities for your customer. Having pre-determined cross-and-upselling strategies will help your customer success managers:

- Sell more of the same or an upgraded version
- Pick the right moments to sell related products or services

Chapter 12

Ideal Customer Dialogue

"How you interact with your customers determines your success"

Yuri van der Sluis
founder of Salesplaybook.pro

This should be one of the most exciting and popular parts of your Playbook. Even though sales people like the freedom to choose how they talk to customers, a framework is always appreciated to provide structure and reliable fallbacks: they can use this as a guideline; it helps them to stay sharp.

Your dialogue framework should include examples for every aspect of customer interaction, including:

The Ultimate Pitch

No pitch is the same, since every customer and buying persona is different; with every pitch some changes are made in wording, story or examples. However, having a pre-defined set of knockout pitches provides a solid backbone your sales people can use when they need it, to help them connect with potential buyers faster and keep them from having to reinvent the wheel every time.

Handling Objections

Every industry and proposition encounters its own set of common objections; sales people should be very well prepared to properly respond and handle these recurrent objections. In such situations, many sales people are lost for words or are left improvising on the spot leaving it to chance; providing them with a set of clear, effective responses will help avoid this.

The Ultimate Sales Call

Sales calls rely purely on verbal skills: no body language can aid you, no physical cues can be read for guidance. Providing a clear set of ingredients for the ideal sales call will help your sales team nail every call they make: you should describe how the ideal call will go, with example scripts, questions, and call-to-action statements.

The Ultimate Sales Meeting

Too often sales people walk away from meetings without uncovering the information they need, making sense of what the customer wants or defining the next steps they are going to take. By providing your sales people with guidance on how to run sales meetings effectively, you leave nothing to chance and you help ensure they get everything they need from every meeting.

The Ultimate Online Sales Demo

More and more meetings are no carried out by video. And while new technology brings lots of great opportunities, it also provides new challenges: there is a risk of not interacting enough, of simply presenting information without properly engaging with the prospect. You need to provide guidance on how sales people should act during online sales demos, so that their skills can transfer to this new medium effectively.

The Ultimate Sales Presentation

Sales presentations can become stale: you tell your story and share some slides. But running really great sales presentations requires a process and a healthy balance between giving and receiving information. By sharing your best practices and helping your team create showstopping sales presentations, you will see your levels of prospect engagement increase dramatically almost overnight.

The Ultimate Negotiation

Negotiations can make or break a sale: it will help your sales team to have scripts and examples of great negotiations, so they know how to not give in too fast and find themselves too flexible in pleasing the customer or being afraid to lose the deal. And you have to have some hard lines drawn to negotiate successfully: you need to make clear in your Playbook what is negotiable and what isn´t, to avoid disappointing or damaging negotiations.

Chapter 13

CRM & Sales Tools

"Sales without proper tools can´t succeed over time"

Yuri van der Sluis
founder of Salesplaybook.pro

Sales tools are hot: new sales tools are introduced to the market all the time, to help sales teams close better deals in shorter periods of time.

According to Smart Selling Tools, on average B2B sales teams are now using 4.9 Sales tools - a big jump from 4.2 last year! The fact is today, sales without proper tools can't succeed over time. And this means your team needs to know how to use the tools as best they can.

Your Playbook should explain exactly what tools your team has; provide them with best practices; explain how to integrate them into their workflow; and make clear what is optional and what is mandator

CRM Best Practices

The most important tool of any B2B sales organization is CRM: it is the main machine that your sales team is running on. However, many teams are not using CRM to its full potential due to deficiencies in the human side of implementation.

Technically, you can be up and running in a day, but it can take years to have it adopted by your sales team – and some never manage it at all! Defining and implementing CRM best practices helps to increase adoption and show what value it can bring to your sales department.

Sales Tools

Whatever tools you have at your disposal have been chosen by your organization to facilitate, accelerate and improve the sales process.

These tools might help you with prospecting and outreach; meeting prospects online; scheduling more efficiently; or legally valid e-signage.

But many of these tools are difficult to use, and many sales people are unwilling to take the time to learn how to make use of them. When you share best practices of these sales tools, your sales team will be able to integrate them much more easily into their arsenal and bring the benefits your organization had in mind to fruition.

Your Playbook should cover all the crucial questions about these tools:

- When and how should this particular tool be used and for what purpose?
- What is the ideal process to follow, the expected workflow?
- How does this particular tool integrate with other tools?
- Why does integration matter?

Chapter 14

Smart Sales Hacks

"You should at least beat your competition in doing things smarter and faster"

Yuri van der Sluis
founder of Salesplaybook.pro

It is unlikely you can win every single customer; the reality of sales is simply too competitive. However, with the right Playbook you can at least be sure you will always win in doing things smarter and faster: sales hacking means finding innovative and smart ways to use the tools and techniques at your disposal to find potential deals faster and close more and bigger deals in a shorter period of time.

Now, this all sounds very nice, but it is easier said than done. Smart sales hacks are only smart if they are unique to your team: if your competitors are using them too, you are merely keeping up. Therefore your sales hacks need to be specific to your team, your market and your customers; they need to be founded on your best sellers' experience in the field and they need to be constantly updated to make sure they stay fresh.

Smart Shortcuts to find Great Leads

Finding great leads is a major concern for B2B sellers; finding ways to hack this process and more efficiently generate great opportunities will give you a clear advantage over your competitors.

Your shortcuts should:

- Be easy to understand and easy to apply
- Not interfere with your current workflow
- Discover leads right before they are on the market

Smart Strategies to reach Senior Decision Makers

Many sales opportunities encounter barriers along the way: without including senior decision makers, these deals will never convert.

Your smart strategies should:

- Find a way to include senior decision makers early in the process
- Find a way to expand to many new senior decision makers within the same prospect, while maintaining the existing relationship
- Establish trust and credibility and radiate authority at the C-Suite

Smart Shortcuts to shorten Sales Cycles

According to Research group Aberdeen, 53% of B2B buyers claim they postpone decisions on at least half of their purchases. Your Playbook should cover ways to avoid deal slippage and even smart shortcuts to shorten your sales cycles. These might include:

- Integrating small customer commitments as part of the sales process
- Ways to facilitate buyer alignment
- Ways to increase customer urgency to move forward

Chapter 15

Content & Templates

“In a world of infinite choice, context -not content- is king”

Chris Anderson

Most b2b Sales teams have access to content, some even great content. Your playbook should cover what content and templates are available and mostly how to use it to maximize impact.

Especially if you have great content, you can use it to increase conversion and elevate the opportunity to a whole new level. If you use the content or templates in the wrong way it may lose its impact. Implemented wisely this can become sales improvement at scale.

General Overview

If sales people can't find the content they are looking for they tend to create their own content or use old materials and update them themselves, even though their primary job is not content creation, but selling. Your playbook should clearly state:

- what type of content is available to them
- where can they find it
- what is the intended use
- best moment in the sales cycle to use the content

Type of content you can offer to your Sales Team

- Company Introduction
- Slide Decks /Presentations
- Product Brochures
- Onepagers, leaflets
- White Papers, Playbooks, Guides

Type of templates you can offer to your Sales Team

- Standard emails for outreach purposes
- LinkedIn Sales Templates
- Standard Proposals
- Standard Contracts, Order Forms

Chapter 16

Conclusion

"Every B2B Sales team deserves a Sales Excellence Playbook"

Salesplaybook.pro

So, there you have it. If you have come this far, you know everything you need to create an impressive Sales Excellence Playbook your sales team will love. And this puts you in great stead for the future: according to Salesforce, the majority of high performing sales teams have Playbooks in place. And by using this guide to create your own, you are ready to join that top echelon of sales.

If you've found this guide inspiring, but creating a Sales Playbook for yourself still feels like a daunting task, we at salesplaybook.pro have got your back: we specialize in helping sales organizations write and implement completely customized Sales Playbooks to transform their sales performance. We guarantee it will be your first step towards true sales greatness.

To find out how we could help your sales team, please contact us at:

gethelp@salesplaybook.pro
or simply click here