

How we Create a Sales Playbook?

Our Approach.

INFORMATION PACKAGE



SALES TRAINING EXPERTS™
CONSULTING, COACHING & TRAINING

Introduction

From Complex to Simple.



Through thoughtful investment strategies and strong customer demand you've grown a successful business. This growth creates opportunities and challenges. You need to create efficiencies, scalability and synergies between all the operating units. You systematically detail the provision of products and services in a series of steps **after the sale is made**. Standard Operating Procedures are developed, documented and trained across your organization. They are the foundation of your Customer Service Cycle.

But where are the detailed steps along the sales cycle that lead to a sale? Where are the Standard Operating **Sales** Procedures?



Scalability Drives Sales Success:

- ✓ Optimized Sales channels in your cross selling efforts
- ✓ Scalable sales teams cost less and produce more revenue
- ✓ Duplicating best sales practices is the key to sales success
- ✓ Standard Operating **Sales** Procedures or Sales Playbooks make sense

Sales Playbook

Defined.



Sales playbooks are a collection of your organization's sales processes supported by the content, tools, messages and strategies a sales team needs to close business at each stage of the sales cycle. They provide salespeople with the guidance and situational coaching they need to advance and win deals. And they can be developed for any recurring selling situation in which you want to drive repeatable behavior and remain nimble. A winning sales playbook consists of a series of "plays" that are based on what's proven to work in previous sales engagements. It can also include best sales practices from across business lines and researched customer purchasing preferences.



Sales Playbooks are...

- ✓ The end product of effectively developed Got-to-Market Strategies
- ✓ Client focused, sales channel specific, and rep activity based
- ✓ Optimized for the highest return on time invested between sales channels
- ✓ Comprehensive 'action' documents for sales leaders in training & incentives

Client Focused

How do customers like to buy?



How do you answer the question?

Creating a sales culture in your organization is important. Many organizations begin the process by asking 'How can we sell more product to our customers?' Client focused organizations ask the question. 'How do our customers like to buy?' This answer determines your Go-to-Market Strategies. These strategies then define your training and incentive requirements.



- ✓ Leverage pre-existing marketing intelligence
- ✓ Gather customer feedback
- ✓ Ask the sales and customer support teams their opinion
- ✓ Build a 'Future State' working model and then validate with the team

Step 1

Identify



The level of effort that goes into creating your sales playbooks will be determined by the expansiveness of your offerings, targets, sales process and personnel. Sales playbooks can be designed top-down or bottom-up and can either cover a broad sales methodology across the overall sales cycle or be focused on improving the execution for a particular process within the sales cycle consistent with a new go-to-market-sales- strategy.



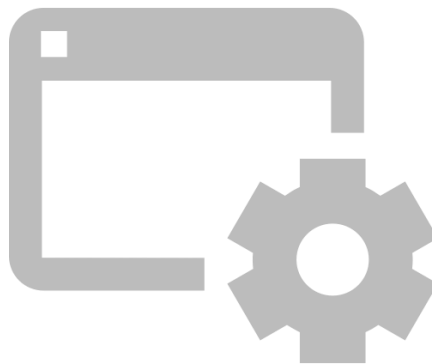
- ✓ Answer the question: How do customers like to buy?
- ✓ Clearly define the Go-to-Market Strategies for your Sales Channels
- ✓ Define the selling objective in each strategy
- ✓ Assess current sales cycle activities & identify customer preference gaps
- ✓ Realign and/or redevelop sales cycles to address these gaps
- ✓ Get agreement among all sales leaders to move forward

Step 2

Build



This requires some heavy lifting. Working closely with all the activity stakeholders, the sales playbook is developed. The level of detail can be extensive, but the real goal of the book is simplicity. Paragraphs become bullet points. Concepts become info graphics. Sales activities describe behaviors, resources and observable outcomes. Key performance indicators (KPI) that determine sales success are identified, benchmarked and measured along the sales cycle. These KPI's are uploaded to the CRM. Sales training skill gaps are identified and training programs are built. Your company maybe performing some of these project deliverables. Sales Training Experts optimizes the project by filling some or all the project gaps.



- ✓ Leverage the results of the repeatable selling system gap analysis
- ✓ Identify the highest key client influence points
- ✓ Identify activity stakeholders
- ✓ Define & document repeatable sales activities that have bottom-line impact.
- ✓ Do a skill gap analysis to assess required training. Build training programs.
- ✓ Create incentive opportunities along high customer influence sales activities.

Step 3

Launch



This is where things get interesting. Sales is the heartbeat of the organization. We don't want it to skip a beat! Change management requires all senior leaders on deck. This is especially true when making changes to the sales department. We recommend implementing change one sales channel or department at a time. Do a 'post launch' report on what worked and what didn't. Move to the next sales channel/department. Re-jig and launch with your learnings. Perfection is achieved along the launch path.



- ✓ Execute changes to CRM KPI's & deliver CRM training to activity stakeholders
- ✓ Execute orderly Sales Playbook Training to all activity stakeholders.
- ✓ Launch sales incentives at the same time training is done.
- ✓ Monitor and assess each launch: Pre Launch KPI's | Post Launch KPIs
- ✓ Report on progress

Step 4

Measure



Once the launch is completed, it's time to measure and monitor. Create a sales dashboard that measures the Key Performance Indicators. Benchmark the measurements over time and establish targets. Set sales targets consistent with measured activity. More importantly get ready to make changes. The best planning and execution will only be optimal at one point in time. Your customer, products, and markets will all change. So should your Sales Playbook.



- ✓ Create a Sales Dashboard. Measure and monitor Key Performance Indicators
- ✓ Establish KPI benchmarks over time and assess sales cycles
- ✓ Establish sales targets consistent with KPI measurements
- ✓ Plan to make changes and build processes to complete the changes
- ✓ Review your sales plans quarterly & make adjustments to your sales playbooks.

Identify | Build | Launch | Measure

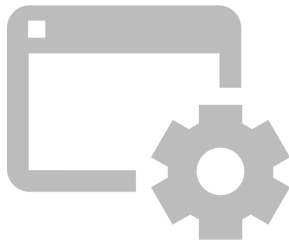
SALES PLAYBOOK



Step 1 IDENTIFY



Step 2 BUILD



Step 3 LAUNCH



Step 4 MEASURE



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