How to Create a Killer Sales Playbook

Four Steps for Designing Sales Playbooks that Win Deals

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You’re a quarterback and you’re down by five points. It’s fourth and goal at the seven yard line with 13 seconds remaining in the fourth quarter. You need a touchdown for the win—you need a play.

A series of questions enter your mind: Have I seen this situation before? Do I have the right personnel on the field? How might the opponent respond? What play should I call? This is when you rely on the playbook prepared by your coaching staff for this very game, before making your next move.

Like a game-day playbook to a quarterback, sales playbooks can provide the pivotal next move to a salesperson. They can shorten sales cycles, increase win rates, ramp up new salespeople, bolster deal sizes and optimize overall sales performance. In other words, they help salespeople win.

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 buying process. 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. A winning sales playbook consists of a series of “plays” that are based on what’s proven to work in previous sales engagements.

**Deliver the Right Content for the Right Opportunity at the Right Time**

In business-to-business (B2B) selling environments, sales managers and their teams are bombarded with a multitude of tools, content, methodologies, training guides, territory plans, pipeline reviews, curve-ball prospect questions, objections, competitor analysis and a myriad of other material and systems to help them sell better. They attend sales methodology certification classes and sales kickoffs and receive coaching strategies from managers or subject-matter experts, often retaining only a small fraction of what was thrown at them. The experience is similar to taking a drink out of a fire hydrant.

While each of these resources has the potential to improve a salesperson’s performance, the challenge is giving them a way to access the right resource at the right time—just when they need it to sell.
The sales enablement experts at CSO Insights address this challenge in their 2009 Sales Optimization Report, which states, “If you are going to invest in training your salespeople, then the follow-up processes need to be in place for their managers to ensure that the training is being applied consistently and effectively by the reps in their daily workflow, so that it becomes ingrained into how they sell. Failing to do so will minimize the ROI your company sees from your training investments.”

Sales managers need to ensure that their salespeople can take all the sales training, tools and content available to them and apply each consistently and effectively. What’s missing is a “smart” delivery vehicle that serves up whatever information is needed at the right moment in the sale cycle. A sales playbook can make order from the portal, content and tool chaos that exists in most organizations today, as well as give a salesperson the confidence he or she needs to make decisions about their next steps.

Just like the quarterback who relies on a playbook to play his best game, sales professionals can have confidence in their sales playbook as a proven guide on how to engage and execute with prospective customers in specific selling situations.

**Why Sales Playbooks Work**

If you look at sales performance across a sales team, it almost always forms a bell curve. The top 10 percent—the star performers—have one thing in common: Whenever they are in a particular selling situation, they do the same set of things that helped them win similar deals in the past. And when something stops working, they find an alternative and stick with it as long as it keeps working. You might say that star salespeople have a set of repeatable playbooks in their heads. These playbooks have been developed and adapted through experience in front of customers.

Middle of the pack salespeople are not as disciplined. They tend to make up a plan for each deal as they go along. Sometimes it works, sometimes it doesn’t.
In his presentation, *Don’t Understand Sales Enablement? You’re Not Alone*, IDC’s Lee Levitt stated that when it comes to aligning buyers and sellers, more than 50% of salespeople are not properly prepared for their initial meeting with prospects.

The best way to drive improved sales performance is to capture what your *best* salespeople are doing to win at each stage of the customer’s buying process and model it with sales playbooks that can be put into the hands of *all* your salespeople. What would happen if all your salespeople were doing more of the things your stars are doing? They could work more deals, win more of those deals and close them at a higher price.

**Collaboration Is Key: It Takes a Team to Build a Playbook**

Creating successful sales playbooks is something that can’t be done in a vacuum by one person or one department. It’s a collaborative effort. Before getting started, here are a few things that are essential to your success:

**Get the right people to the table.** Playbook design should typically be a collaborative effort between sales, sales operations, marketing operations, product marketing, subject matter experts and other content producers in your organization. The team should also include those who will use the sales playbooks, those who will supply the content, and those who will be responsible for their roll out and evolution. And, it is especially important that you get some of your top salespeople involved. This is your governance team.

**Identify a driver.** Ideally, the collaboration should be orchestrated by one or a few senior managers in sales operations and/or marketing who are mutually responsible for sales enablement. Many organizations create a specific role for a person who acts as the “Playbook Coordinator” or “Playbook Manager.”

**Outline a set of goals.** You’ll want each member of the sales playbook team to provide their support during the process of creating and refining playbooks. Ensure that they can commit appropriate resources and that expectations are set with their team.

“Creating successful playbooks demands that sales and marketing functions must work closely together to build and refine the targeted and integrated content, tools, tactics, and strategies that are aligned with sales process and tuned to the specific selling scenario.”

- SiriusDecisions
How to Create a Killer Sales Playbook

The Four Steps of Playbook Creation

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.

You may be familiar with the expression “don’t try to boil the ocean.” This is a good philosophy to keep in mind when creating your initial sales playbooks. To help you get started, we’ve developed ABLE, an easy four-step guide for designing your sales playbooks. ABLE is assess, build, launch and evolve.

Step One: Assess

Preparation is key. If you’ve ever painted a room, you know the exciting part is getting the paint up on the wall and marveling at the result, but the majority of a great paint job is done in the preparation. For maximum sales playbook success, you’ll want to focus your effort up front in the assessment step.

Best practice for assessing:

- **Focus in.** In keeping with the “don’t boil the ocean” idea, focus on a strategic selling objective, specific offering, promotion, industry vertical, buying cycle or customer profile. For example, you may begin by targeting a product sold by a portion of your inside sales team, in a specific industry and directed at a specific title or set of buyers. Or you might decide to create a playbook for new opportunities, expansion, or a specific competitor.

- **Identify selling situations where you want to drive repeatable behavior.** Create your initial playbooks with the notion of expanding upon proven success.

- **Conduct a discovery session with a number of the most successful salespeople.** Interview these people along with the other resources that contribute to the successful sales engagements that
you’re looking to replicate. Identify what these superstars are doing. Note: Ensure you have influential opinion leaders as part of this group.

- **Seek to understand how your sales team sells.** How do the top performers move through each stage of the sales cycle? What activities are associated with each stage that advanced the deals? This information will be extremely helpful to you in creating effective playbooks.

While you can create as many sales playbooks as you need, based on the assessment process, getting started with a single effort will help to ground those on the team with the concept and creation process. After completing your initial sales playbook, you’ll be able to enhance and optimize it, use it as a template, and evolve your own process for additional sales playbook development.

**Bringing It All Together: Aligning with Your Sales Process**

Whether you decide to begin with a top-down or bottom-up approach, your playbooks should be aligned with your sales process.

“But, wait,” you say. “We don’t have a sales process!” This is a very common situation. Chances are that you do have some process or steps that define the stages of your sales cycle. Sales playbooks are an excellent organizational hub for defining them. Also, every organization has successful salespeople who are following their own processes.

If you don’t have a defined process, you can still get started quickly by defining a baseline set of sales stages and then using playbooks as your organizing tool for its development. Focus on mapping out your existing sales-to-buyer lifecycle or process. Some of the most successful playbooks have been those designed from a blank slate or ones in which it was decided that the sales process would be reinvented through the use of sales playbooks.

If you have a sales process (or multiple ones), align it with your customers’ buying cycle and create a map for your sales playbook. The goal is to stimulate a conversation between seller and buyer—the seller diagnosing the buyer’s needs and then providing the buyer with the right information at the right time.
In addition to directing salespeople to what they should do at each stage of the sales cycle, mapping will also identify specific activities that need to be completed to advance deals. This should illustrate how your sales teams engage with customers at every stage of the buying process.

You’ve done the preparation, now it’s time to create a sales playbook.

**Step Two: Build**

As you begin, remember that your sales playbooks are a *guide* for your sales process. If your salespeople are locked into completing each activity, they may become less likely to use your sales playbooks. Your challenge will be to strike the right balance. Creating recommended—instead of required—steps will offer more flexibility and provide a set of guard rails for the salesperson rather than handcuffs. These steps will show the salesperson which actions are proven to help win the business or accelerate the deal, while also offering alternatives and coaching strategies that could advance a stuck deal.

**Best practices for building your sales playbook:**

- **Leverage the results of your assessment.** Merge the information gathered from your assessment phase with your sales process and customers’ buying cycle. Use the successful patterns that you identified from the top salespeople you interview to create your stages and activities. For example, some activities that might be identified for a “Qualify the Opportunity” stage might be as follows:

- **Identify the activity stakeholders.** The activities in your sales playbooks will most likely drive salespeople to various tools and technologies that your organization has implemented. Make
sure you collaborate with the people who understand and are responsible for the administration and use of these resources.

- **Create a visual.** It’s important to map out how your information will flow from where it lives to the sales playbook. Lay out the findings from your assessment phase in a visual format to form a logical overview of how the playbook and its activities will be created. For example, you can lay out your sales playbook in columns for your stages and rows for your activities. Do this by using a white board, spreadsheet, web page, or Visio diagram that can be shared among your team. (See the appendix for a sample sales playbook template.)

- **Have a content discussion.** This will help you to understand the details about the content and the activities you’ll want to include. Ask pertinent questions, such as who is responsible for content? Who will keep it fresh? Where does it live? Is there a schedule for it? Does it have other dependencies? Create a list of your content contributors, the content and activities they’ll be responsible for, as well as the tools or systems used to manage content.

- **Identify the best format to deliver activity content.** All forms of content formatting and media should be considered when building out playbook activities. Content can be any type of Word document, Power Point, podcast, video, URL link, or tactical coaching tips. Think about the best format for the content to be delivered.

- **Build sales playbooks that can be integrated where your salespeople “live.”** This tip is specifically for those whose salespeople use a CRM (Customer Relationship Management) system. This is the ideal environment in which to deliver your sales playbooks. The standard method of being shipped off to a portal, search engine, or other content repository pulls the salesperson away from the sales opportunity. There are multiple benefits of serving up a playbook within the CRM system, including improvements in data capture, productivity and overall sales performance.

- **Get sales managers, star players and subject matter experts to provide coaching tips.** Walk through the stages and activities with managers and ask them how they would coach their team to conduct those activities or what advice they would provide in advancing a deal. Also ask your
star salespeople, subject matter experts and other key resources in the sales cycle. Include these tips with each activity in the playbook.

**Step Three: Launch**

Launching your sales playbooks requires some thoughtful planning. As you release them, ensure that your end users are properly educated, that change management issues are considered and that a roll-out plan has been created. While sales playbooks should be very intuitive, they are still a new tool and process that should be given due attention when launching.

**Best practices for launching your sales playbook:**

- **Start with a pilot launch.** Whether you started with one sales playbook directed to a single team or are planning to launch multiple sales playbooks, it is best to pilot the launch with a good mix of end users. Get a mix of star performers, middle of the pack and new salespeople to use them. Get their feedback, then release your sales playbooks to your broader audience.

- **Put executive muscle to work.** Gain executive support and have them mandate (ahhem....promote) use by senior management, as well as the rest of the sales team. Having this level of support during the roll out will vastly improve the adoption of your sales playbooks.

- **Enlist the help of your cross-functional governance team.** Go back to the original group who worked on the sales playbook and assign various tasks in the roll out that will help ensure success and adoption.

- **Educate your internal stakeholders about sales playbooks.** Get them to understand the terminology and strategy and begin to see how they can be used. The cross-functional team focused on enabling sales should all become familiar with the sales playbook concept and help evangelize it going forward.

**LAUNCH TIP**

**Run a teaser campaign leading up to launch.** A teaser campaign is a series of communications geared toward piquing interest of the end users. For example, you might create a communication highlighting the benefits of playbooks to your salespeople—what they’ll be able to do, how they’ll save time, and how they’ll increase sales performance when they’re launched.
• **Engage education resources.** If your organization has a training department, leverage some of their successful tactics and methods used for other roll outs within your organization.

• **Think about your end users.** How do they learn, what tools do they use and how will you best engage them to ensure success through your sales playbook launch? In training, make sure to tie what they learn to something they can put into practice immediately.

• **Anticipate change management issues.** Change can be difficult. Thinking about the best methods to introduce and how to work sales playbook use into the everyday life of end users will help get everyone comfortable and make launching them more successful. Walk them through examples of how sales playbooks will be used in their daily lives.

**Step Four: Evolve**

Continual improvement of your sales playbooks through measurement and experience will allow you to realize maximum benefit. You may be familiar with the success of analytics in sports. Teams aggressively leverage analytics to uncover winning strategies and apply these to their playbooks weekly to improve their odds of winning. They apply analytics to all facets of their business, such as talent management, operations, process and game strategy.

You’ve likely heard, “You can’t manage what you can’t measure.” This is a key element for keeping your playbooks fresh and relevant for the buying situations your salespeople face daily. Understanding what is and is not being used at key points in the buying process allows you to keep your sales team focused on the activities that work and eliminate those that do not. Leveraging analytics to drive your sales playbooks will result in improved decision making and overall improvement of your sales performance and marketing effectiveness.

By gaining insight about what works and what does not in a given selling situation, sales managers, subject matter experts, marketers and salespeople themselves can analyze activity and evaluate performance on an ongoing basis. This practice needs to be built right into the selling process so that every selling opportunity can be monitored and optimized.

And the insights gained should go right back into your sales playbooks for future opportunities. Continuing to identify and enhance your best selling situations will help your organization bubble the best of the best practices to the top. This will ensure that salespeople are prepared for every customer interaction and increase the probability of winning.
Coaches update their playbook strategies seasonally and modify them weekly. You should do the same for your sales playbooks. Outline an overall strategy for how they’ll be created and then use feedback, analytics and experience to tweak them on an ongoing basis.

Best practices for evolving your sales playbooks:

- **Ensure that you have a feedback loop.** If you want to get good feedback, you have to make a clear path for it. Leveraging social networking tools can be very useful if applied properly and in a targeted fashion. For example, forums and discussion boards can be used effectively with end users, content owners and sales playbook managers.

- **Develop a review schedule.** Decide how the sales playbooks will be kept fresh and evolve, as well as who is responsible for specific sales playbooks and the process for updating them.

- **Create analytics by stakeholder.** Create analytics to enhance overall sales performance and individual productivity. For example, provide salespeople with a dashboard or report that drives daily activities that help them advance deals. Supply managers with playbook and pipeline reports to help them have more meaningful information about the probability of an opportunity to close.

- **Build reports that roll up to overall sales enablement goals.** Look at the goals you have for overall sales performance. For example, you might be focused on win rates, increasing deal sizes, increasing productivity, or the time it takes to ramp up new salespeople. From these goals, identify the key questions you want to answer by pulling metrics that include the combination of playbook insight, sales pipeline and overall sales performance data. From the metrics, create specific reports that provide you with the insight and action to drive more relevant information to “get the job done,” and that will help increase sales performance.

**EVOLVE TIP**

Consider establishing your baseline metrics as you define your stages and activities. Identify key goals and metrics for what you want to understand about your sales playbook usage. Leverage current sales effectiveness or pipeline analytics you use today and then begin to expand them within the context of the playbooks you design. For example, you can monitor metrics that influence increased win rates, increase the number of opportunities per sales person, increase average deal size and deal velocity.
Never stop evolving your sales playbooks! The beauty of a sales playbook is that it is a living, breathing document that is continually improved. While it takes effort to refine it, the returns are phenomenal.

With Sales Playbooks, Everyone Is a Winner

Sales playbooks are delivery mechanisms that reinforce all of the investment made in sales process, content, messaging, systems and other training. When designed well, they empower your salespeople to improve their productivity, offer managers an effective way to conduct situational coaching, as well as monitor, understand and enhance the sales process. Finally, they can help all those involved in sales enablement to work together in driving sales performance optimization.

By following the ABLE steps laid out in this guide, you’ll get your first sales playbooks up and running in no time. Soon after implementation, you will see the results of employing such a powerful sales enablement tool that will help all of your salespeople sell smarter!

About Qvidian

From first contact to creating loyal customers, Qvidian enables your sales organization to confidently engage prospects and win more often using proven, dynamic tools, and integrated best practices. Qvidian’s cloud-computing sales effectiveness platform combines Sales Playbooks & Analytics, Proposal Automation, and a robust Content Library. See it in action at www.Qvidian.com.

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**Qvidian**

**Sales Playbook Template**

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