Sales Playbooks: The What and Why

Water, water, everywhere – but not a drop to drink. You can’t blame today’s b-to-b sales rep for feeling like the Ancient Mariner of the famous Coleridge poem; overwhelmed by the sheer volume of content available to leverage, and not knowing what specifically exists or even where to find it.

To the rescue with increasing frequency are sales playbooks, a compass for locating critical knowledge. Beyond providing direction to relevant content, playbooks help guide reps through the key steps and activities of a deal. In this brief, we will define a sales playbook and note a few key items to keep in mind when deploying one.

**WHAT IS A PLAYBOOK?**

The playbook concept is as old as sales itself; it was born from the idea that steps in a typical sales process are repeatable and can be labeled. Fifteen or 20 years ago, playbooks were printed on heavy-stock paper, laminated and called cheat sheets or sales guides, but their premise was the same: To provide step-by-step instructions on how to manage a particular sales scenario (e.g. how to sell product X into industry Y). The playbook catalogued key activities and milestones that should be completed to move a sales process – and the commensurate buying processes it supported – forward. If a process step called for the use of content, the rep pulled it from a physical inventory.

Today’s reps pull content from portals designed very much like Web sites, with the playbook essentially acting as a “home page” for a given scenario. Relevant content (as suggested in the playbook) can be accessed as needed through hyperlinks to the content portal, eliminating the need for maintaining a physical inventory and minimizing search time. Content is used both internally (e.g. a pricing configurator) and externally (e.g. a white paper that is shared with a prospect). The vital components of a sales playbook should include the following:

- **A brief description of the “play.”** A two-to-three-paragraph overview of the sales scenario covered, including the market opportunity, key issues and industry trends.

- **Key activities by stage.** Playbooks are typically organized by sales stage; each stage should contain a series of key activities to be completed.

- **Content organized by activity.** Relevant content is accessed by hyperlinks that are embedded within the activity they support. For example, an organization might provide a link to a prospecting email template within an activity titled “secure initial meeting.”

- **Access to sales enablement resources.** Each playbook also should provide links to such enablement tools as online training resources, win/loss analysis, battle cards and competitive analysis.

- **Social collaboration.** The playbook should offer the ability for reps to communicate with subject matter experts, exchange best practices and provide feedback on content effectiveness to the playbook development team. Communication may occur via email, an internal discussion board or even a wiki.

**ADDITIONAL CONSIDERATIONS**

Over the years, we have seen a number of playbooks created by b-to-b organizations; some are exceptionally effective, while others fall far short of the mark. Those in the effective column share four common traits, including:

- **They are concise.** While they can be used
to support a more exhaustive and thorough documentation of a given scenario (e.g. a multi-page product guide for reps to reference), playbooks themselves should be no longer than four Web pages. By keeping the playbook short, an organization increases the likelihood it will actually be used in the field.

- **They are flexible.** There’s no right or wrong answer when it comes to deciding what selling scenarios to support via a playbook. An organization may end up building several, some with broad application (e.g. positioning its solutions for a specific vertical) and some very specific (e.g. selling the business value of a given solution to an economic decisionmaker). In deciding on what scenarios to build your playbooks for, consider the complexity of the process. For a highly complex sales process with multiple buying roles, activities and milestones, it may make sense to break down the process and create a playbook for each step in the process, especially in order to adhere to the four-page playbook length limit.

- **They align with a common, overarching sales process.** While each playbook will be unique based on the scenarios it addresses, each should follow a common sales process (hopefully one already in use). This provides consistency and familiarity from a user perspective, and helps in the playbook’s design. For example, if your organization uses a five-step sales process of qualify, identify solution, demo, propose and close, each playbook should follow these stages. Playbooks can be built for a given product that lists the various activities to be completed with the relevant content to use for each stage, or for a given stage, product or industry.

- **They are accessed through the SFA system.** It’s more likely that reps will use a playbook if they don’t need to leave their sales force automation tool to access it. By pulling information from SFA (e.g. the sales stage the opportunity has reached), the sales rep can be guided to content that’s most relevant within the appropriate playbook, transforming SFA from being a reporting tool to an enablement tool.

**THE SIRIUS DECISION**

It seems that the world of sales and marketing is in a constant — yet elusive — search for a sales enablement silver bullet. And while playbooks can indeed be a useful tool to increase the productivity of the field force, they should not be considered a cure-all for deeper sales ailments. As in sports, where every team has their own set of playbooks, it’s having the right talent, knowledge and skills for optimum execution that separates winners from losers. Playbooks should not be considered a substitute for proper rep selection, training and coaching; instead, they should be viewed as a valuable asset to support the hard work required to create a world-class sales organization.