The Ultimate Guide to Creating & Managing a Sales PlayBook

What to Include, How to Manage, & Why a PlayBook is Crucial to Growing Sales

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criteriaforsuccess [make sales success a habit.]

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01.
Introduction

If you downloaded this resource, you likely fall into one of the following categories:

1. You have no idea what a Sales PlayBook is, and you're dying to know.

2. You're familiar with the concept of a Sales PlayBook, and you're ready to start building one.

3. You currently have a Sales PlayBook, but something's not working.

OR

4. You just want to know what CFS has to say about the Sales PlayBook process (a little internet stalking is okay).

Whichever category you fall into, this eBook is here to help.

As you read through this guide, you'll discover the answers to the following questions:

- What is a Sales PlayBook?
- Why is a Sales PlayBook important?
- What should be included in a Sales PlayBook?
- How is a Sales PlayBook managed?
- Who should be involved in the Sales PlayBook process?

Ready to get started? Let's go!

02.

Sales PlayBook 101

What is a Sales PlayBook?

At CFS, we believe that a Sales PlayBook should be a dynamic resource containing an organization's best practice sales strategies and processes.

Wait, what do we mean by *should*?

Well, a Sales PlayBook should be more than just a manual. It should be more than just a book of text.

What a Sales PlayBook is Not

Back in what we like to call "the good 'ole days," a Sales PlayBook was quite literally a sales manual.

Said sales manual was typed up by Joe Sales Manager, or Jenny Salesperson, or Jerry Office Administrator.

This manual would include a table of contents, referring a salesperson to everything they might possibly need to know about selling.

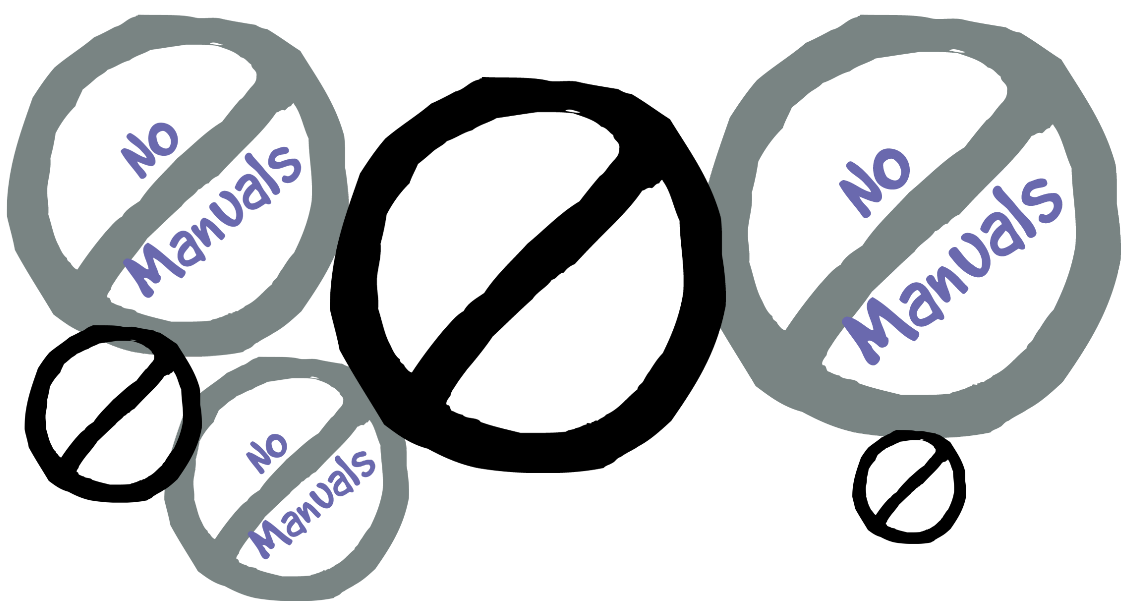
Need to know how to get a meeting? Refer to the sales manual.
Need to know how to close a deal? Refer to the sales manual.
Need a pitch from 1989? Refer to the sales manual.

Catch the drift?

The problem with the traditional "sales manual" is that it's simply not effective.

Why?

Salespeople (and most everyone) hate reading manuals.



Think in terms of appliance manuals.

First, do you even read those things to begin with? If you do, how long do they stay relevant? Well, for the duration that you own that specific appliance.

If you buy a new TV, that manual will be helpful if you have a problem figuring out where the HDMI port is located, right?

But what about when you replace that TV with a new one a few years later? Are you going to refer to the old TV manual? No way! It's a new TV!

The same thing applies to the concept of a Sales PlayBook.

The sales process today is not what it was in 1965, or 1975, or 1985, or even 2015 for that matter!

Technology is advancing so quickly that industries are changing even as you read this eBook. By the time you're done reading this, the algorithms on LinkedIn will be different and you won't be able to tag or make notes on a contact (this really just happened).

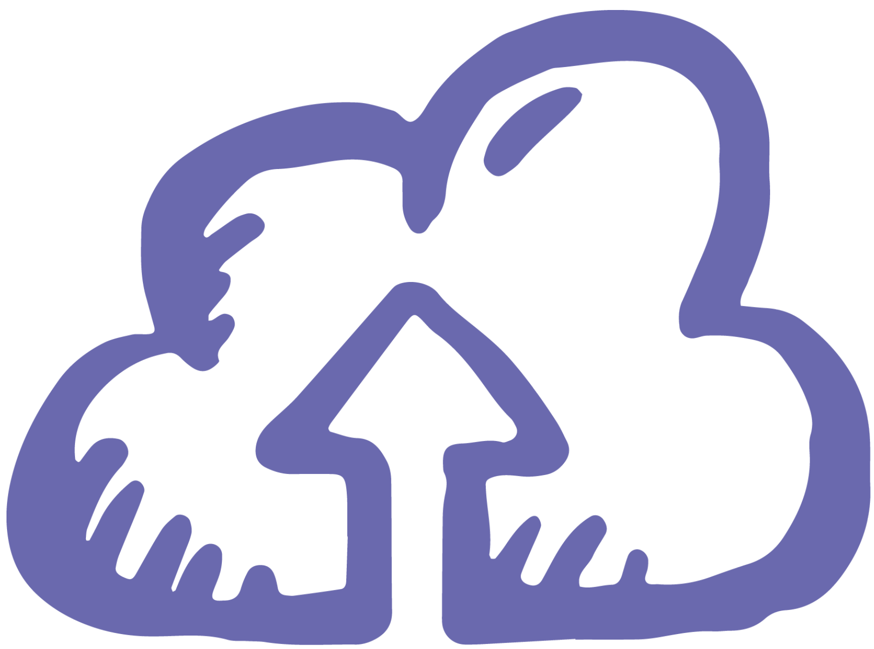
The point: a Sales PlayBook needs to be dynamic. It needs to be easily accessed, edited quickly and simply in real time, on a platform (or app) that is flexible, and most importantly it needs to be useful!

The CFS Sales PlayBook

In our experience, a great Sales PlayBook is **interactive**.

It's a **living, breathing** document that not only houses best practices, but grows and develops with your team and provides value.

For us, this means that our Sales PlayBook is **cloud-based**.



We build the PlayBook on a platform that houses our process within a collaboration-friendly wiki. Updates are made in real-time.

Instantaneously.

The CFS Sales PlayBook is not a manual; it's a sales tool used daily that grows with each and every member of a sales team. It tracks, it develops people, it guides, it teaches, it grows as teams grow.

Why is a Sales PlayBook important?

After surveying hundreds of CEOs, sales managers, and salespeople, we've discovered the following to be the **biggest** sales problems:

- There's no process for selling—and if there is, salespeople struggle to keep up with "processes" while trying to sell.
- CRM doesn't add value to the sales process and doesn't save time for the seller
- Communication with marketing is difficult or non-existent.
- Not knowing how to generate and convert more leads to new opportunities
- Salespeople struggle with specific tasks—such as getting the right leads in the pipeline, using the right language, closing deals quickly, or managing their time.
- Salespeople don't know what questions to ask prospects.
- Salespeople struggle to run effective sales meetings with prospects.
- Salespeople don't have a consistent process for following up after a meeting.
- Salespeople struggle to engage people they meet in 30 seconds or less.
- Salespeople don't understand the value of social selling, or how to use social media to aid in the selling process.

What a Sales PlayBook Does

The quick answer to why a Sales PlayBook is important lies in the above sales problems. A properly designed and utilized Sales PlayBook produces the following results:

- **Your company becomes more valuable**
- **Your team sells consistently**
- **Revenue grows faster**
- **Deals close quicker**
- **Salespeople are managed better**

03.

PlayBook Mechanics

What should be included in a Sales PlayBook?

It's important to be strategic about your Sales PlayBook.

Include too much and people will get lost. Include too little and you're missing opportunities for growth.

At CFS, we divide our PlayBooks into five success areas:
Prospecting, Selling, Support, System, and **Team.**

Best practices in the Prospecting and Selling areas tend to get the most attention because they relate more to generating, developing, and producing revenue.

The other areas are equally important because they drive good management and a healthy selling culture in the enterprise.

1. Prospecting

The prospecting section of your PlayBook is all about getting more quality leads.

We believe the foundation of successful selling is effective prospecting, and the prospecting section of your Sales PlayBook should focus on developing the skills and executing the activities associated with effective outreach to new customers to start the sales cycle.

Prospecting Action Plan

In order to focus on your prospecting activity, we recommend that you begin by creating a prospecting action plan on a monthly basis. Need help getting started? Check out our free eBook on Sales Prospecting—it will help!

Targeting

Next, focus on targeting. What criteria will lead to your ideal client? What tools have you employed or tactics do you use to target the right prospect?

Include all information related to your targeting process here, then go out and find some customers!

Lead Sources

This section should be all about ideas for finding new prospects. Want two great approaches? Think about effective approaches to ask for referrals and perform networking.

Outreach

Once you've established the tactics above and have acquired a list of prospects, it's time to start reaching out. Include pages for the most effective way to reach out through email and phone.

30-Second Commercial

As your team is prospecting, they'll need a 30-second commercial. We recommend creating different versions of the 30-second commercial for different venues and applications. It's also important to have 30-second commercials that focus on specific niche benefits that your company provides.

Be sure that all of your 30-second commercials reference the most common problems that your clients face.

2. Selling

Effective selling is a combination of philosophy and mechanics. It’s important to understand the why behind your actions and establish the right mindset before tackling the nuts and bolts, or the how.

The selling section of your playbook should contain the philosophy and mechanics recommendations that drive behavior to close more business opportunities.

Here are some areas of focus for the selling section of your Sales PlayBook:

Sales Process

The foundation of a successful sales function in any organization is a clear sales process, which enables everyone to speak the same language and execute best practices.

A typical sales process has three stages: lead generation, lead management, and opportunity management. Developing a specific process for each stage is crucial and it may help you to develop a sales process map that guides the mechanics of your sales process.

Value Proposition

Aligning on the value proposition you provide to your customers, as well as your core strengths, will help you bring a consistent message to the market. It's also an integral part of selling—a strong value proposition allows buyers to think of your products and services as investments, rather than costs.

A value proposition is different from a 30-second commercial. Where a 30-second commercial presents problems that your company solves for clients, a value proposition is a clear statement of the concrete business results a customer will get from purchasing or using your product and/or service.

Running a Meeting

Have you ever ended a meeting with a prospect and wondered how it went so wrong? The primary reason meetings go off track is the lack of an agenda. "Winging it" is rarely a strategy for a successful meeting!

Use this section of your Sales PlayBook to guide your team on how to run an effective meeting with a specific agenda. The key here is that agendas, like appointments themselves, require purpose. If they have purpose, meetings will be easy and will lead to improved results.

Success Stories

Stories are an incredibly powerful tool in selling, and when your sellers leverage each other's stories in conversations with prospects and clients, they can gain a lot of credibility.

A strong sales success story includes the following three elements:

1. **The problem a client faced**
2. **The solution that was provided**
3. **The business impact of the solution**

Common Objections & Pushbacks

Anticipate hesitation and objections from prospects. They often will have a preconceived idea of your salespeople, your company, or your offering, which might put them on the offensive.

Break that stereotype by creating a plan for handling common objections and pushbacks.

3. Support

A strong support structure is essential to establishing and replicating best selling practices. Effective sales support generally consists of three areas: management, marketing, and operations.

Create a Sales Management area, which provides a structure for accountability and guidance that salespeople need to succeed. The Sales Management section in the PlayBook contains best practices for sales management, and access is restricted to managers and senior staff. Develop a checklist that contains management "how-tos," such as how to run an internal meeting with your sales staff and how to coach and mentor them.

In the Marketing area, support the sales team by clarifying the business message, identifying targets and generating inbound leads, and developing collateral salespeople can use in conversations with prospects.

Add an Operations area that describes what the organization is capable of providing to your clients. From pricing and implementation schedules to industry-specific rules and regulations, operational support helps salespeople avoid over- or under-promising and aligns sales with delivery.

The Support section of the Sales PlayBook should also contain onboarding and ramp-up materials for new hires.

4. System

The sales function is supported and augmented by a number of important systems – your Sales PlayBook being one of them!

Document best practices for using your internal systems, such as CRM, ERP, and any other systems salespeople use.

Don't replicate user manuals, but document best practices that won't be found in user manuals, such as your organization's data policies.

5. Team

Sales success requires that your salespeople maintain a strong bond with each other, so they are part of a high performing team. Use this section of the PlayBook to enable them to communicate and collaborate with each other.

Include:

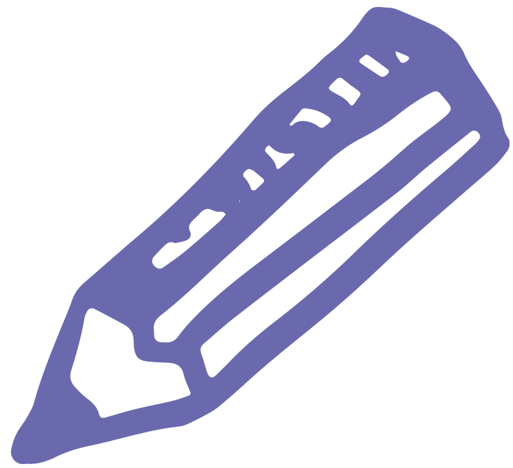
- Org charts
- Discussion boards and forums
- Success stories and case studies
- Lessons learned in the field
- Recommended improvements to the Sales PlayBook

04.

PlayBook Management

How is a Sales PlayBook managed?

Consistent management of your Sales PlayBook is pivotal to sales success.



In order to keep your PlayBook relevant, we recommend developing a Sales PlayBook team that manages and maintains the PlayBook and it's associated processes.

This team is responsible for developing the initial PlayBook content, and should meet on a quarterly basis to review the PlayBook content and identify areas that need to be created, updated, changed, or removed.

In addition to the Sales PlayBook team, all PlayBook users should have the ability to contribute to the PlayBook on an ongoing basis, but the PlayBook team is charged with maintaining a strategic point of view and looking after the PlayBook as a whole.

Who should be part of the Sales PlayBook team?

Everyone with a stake in seeing sales succeed! Yes, **everyone**!

We recommend that people from finance, and members of management and executive teams participate in the development, deployment, and adoption of the Sales PlayBook. It's also important to have a mix of experienced and less experienced people on the team, as this allows for varying thoughts and perspectives to be included.

When does Sales PlayBook content development and management end?

Never!

How does the Sales PlayBook get rolled out?

The key to success is that the Sales PlayBook be adopted by your sales team. We recommend that you develop a training program that accompanies the roll out of this vital resource. Below are the steps we take when working with our clients, to deploy their PlayBooks:

- Assign specific "pages" of the PlayBook to one or more members of the PlayBook team. These individuals are responsible for drafting content in each area they own.
- Facilitate content-development sessions. The entire team reviews the content that has been drafted and makes recommendations for modifications, as needed. These sessions can be done in person or via remote sessions like WebEx or GoToMeeting.
- Conduct sales training on each area of the playbook, again using a combination of in-person and remote sessions. We recommend that you phase in the PlayBook so the salespeople can learn your processes and procedures in digestible chunks.
- Refer to the PlayBook on a frequent basis, such as during sales staff meetings.
- On a rotating basis, have various members of the sales and marketing teams present either an assigned section or one of their choosing to a group of peers and managers. You can even role-play some of the techniques if you do that sort of thing in your company.

05. Conclusion

Moving Forward

By now, you've probably realized that there is much more to the Sales PlayBook than you originally thought.

It's a living resource that is shared by your community of users.

The best PlayBooks are the ones that inspire you and your company to continuously improve and produce the best possible sales results—making your company not only productive, but also extremely valuable!

Let's Get Social!

Looking for tips on sales management, sales processes, and sales growth? Join us on social media & visit our blog!

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