

# SALES PLAYBOOK



# WHO WE ARE

## Our Vision

-TELL A STORY OF WHERE YOU STARTED AND HOW YOU GOT HERE

## Our Values

-HAVE A DECLARED SET OF VALUES FOR THE COMPANY OR SPECIFIC TO SALES

# WHO WE SERVE

- ALIGN ON WHO YOUR IDEAL CLIENT IS AND EXPLAIN WHY YOU SERVE THEM

# PRODUCTS & SERVICES

- LIST ALL YOUR SERVICE AND PRODUCTS
- IF POSSIBLE, INCLUDE A ONE-SHEET PRICE MATRIX FOR QUICK REFERENCE

# PROSPECT INSIGHTS

Persona	Problem	Solution	Sales Proof

# COMPETITIVE INSIGHTS

Competitor	Strength	Weakness	Advantage

# BUSINESS & LEAD RULES

- WHAT IS EXPECTED
- WHAT IS RECOGNIZED
- WHAT IS COACHABLE

# SALES PROCESS



(EXAMPLE)

## PIPELINE STATUS DEFINITIONS

- HAVE A CLEAR DEFINITION OF EACH STAGE OF THE SALE
- HAVE CLEAR STEPS THAT ARE NEEDED TO MOVE TO EACH STAGE

### **Example:**

Open – No contact has been made

Attempted – Called with voice mail, email sent

Contacted – Reached contact

Needs Assessed – Problems or desires recorded

Quote submitted – Pricing and products sent to prospect

Negotiation – Final decision being made

Closed Lost – Lost reason

Closed Won – Won reason



# SALES CADENCE

- HOW MANY TIMES AND HOW OFTEN A LEAD IS WORKED

**Example:**

**Day 1:** Email Quote & Call with Voice Mail

**Day 3:** Email in the morning, call in the afternoon

**Day 5:** Call in the morning, call with a voicemail in the afternoon

**Day 7:** Email in the morning, call in the afternoon with a voicemail

**Day 10:** Email and call in the morning

**Day 11:** Enter in Nurture Automation

# CRM USAGE

- HAVE AN INSTRUCTION GUIDE OR VIDEO ON HOW TO USE YOUR CUSTOMER RELATIONSHIP MANAGEMENT TOOL

## **Example:**

### Leads

- Leads must be entered into CRM
- All interactions must be recorded
- Deals not closed in 30 days to be recycled into marketing campaign

### Reports

- Friday reports pulled from Accounts>Reporting>Sales>Lead Details

# KPI/PIPELINE REPORTING

- SET EXPECTATIONS ON REGULAR REPORTING
- KEEP THE TEAM ACCOUNTABLE
- GIVES SALES AND LEADERS LINE-OF-SIGHT TO SUCCESS

Example:

		Jan	Feb	Mar
Units	Forecast	70	95	120
	Actuals			
	% attainment			
	YoY Growth			
Annual Value	Forecast	\$140,000	\$190,000	\$240,000
	Actuals			
	% attainment			
	YoY Growth			
Gross Margin	Forecast	10%	10%	10%
	Actuals			
	% attainment			
	YoY Growth			

# RESOURCES

- A LIST OF WHERE SALES MAY FIND ANYTHING THEY MAY NEED TO PROSPECT AND SELL