

Increase Sales Readiness with Playbooks

An interview with Jeanne Buchanan, Marketing Director, Critical Path Strategies



Sales playbooks produce self-sufficient sales teams who accurately assess and address selling challenges.

Today's market dynamics are forcing companies to rethink how they market and sell products. But one thing remains the same—customer-facing time is valuable. In this interview, Critical Path Strategies' marketing director, Jeanne Buchanan, relays how to create sales playbooks that will empower your sales teams, increase their effectiveness, and win more business.

First, let's define our terms. What is a sales playbook?

BUCHANAN: It is a guide that captures and documents what your best salespeople do to advance and win deals. It integrates customer knowledge, buying process, company positioning, competitive analysis, sales process, and key messaging. This collective institutional knowledge is arranged in a series of situational plays that align sales activities, content, tools, and coaching with your customer's buying process. It delivers stage-appropriate content to salespeople within the context of their current deal.

What makes a good sales playbook?

BUCHANAN: A good playbook is one that your salespeople will use. It contains the right information and experiences on the most successful ways to sell your product at the right time. It is appropriately sized and referencable so that learning is a click away, not a novel away.

What kind of sales knowledge belongs in a playbook?

BUCHANAN: There's no formula. But in our work with clients, we have identified some common elements that are particularly effective.

- **Pain points/symptoms and development questions** – Identify your key buyers and their motivations. What's causing them real pain?
- **Positioning statement or value proposition** – This brief statement ties how your product links directly to your customer's pain points and the business problems you solve.
- **Potential objections and responses** – Be prepared. This section captures the most common objections and how best to respond to them.
- **Customer results** – Be sure to capture quantitative data that demonstrate how much better things are with your solution than they were before.
- **Qualification and process-specific sales strategy** – We like to have a section where your people hit the pause button and ask the question, "Am I running the right play?"
- **Key differentiators** – It's always good to start with some competitive analysis. How do your competitors position themselves in the market? How do your customers view you against the competition?
- **Related resources** – We provide links to applicable information—things like brochures, FAQs, presentations, tools, references, contract templates...anything that a salesperson is likely to need.

How many plays should I have?

BUCHANAN: Again, there's no rule. One of our clients has 10 plays, another only one. Yet another has 16 to 20 that are based on sales competency. The important thing is to select the selling situations where you want to stimulate repeatable behavior.

What process do you use to develop a playbook?

BUCHANAN: Once we're engaged by our sponsor, our process works this way.

- **First**, we develop a framework for the plays. We identify the content "buckets" based on conversations with the sales leadership. Remember, sales playbooks are to the point—we collect only the plays and resources with proven effectiveness for a given sales situation.
- **Second**, we gather relevant collateral and leverage existing collateral. We distill volumes of information to capture and scale best practices.
- **Third**, we interview sales operations and subject matter experts and harvest the "playbooks" in their head. Experience-based playbooks are buyer-focused. These folks give us a clear understanding of the buyer so that we align the appropriate information with the buyer's needs. They also validate the best practices gleaned from the collateral and offer coaching advice.
- **And finally**, practice, practice, practice. In our playbook deployment training, we develop real-world role plays that put salespeople through their paces. The more they practice, the more confident they become in their ability to successfully execute sales calls.

How do sales leaders ensure that their salespeople will actually use the playbooks?

BUCHANAN: Some sales leaders require that their salespeople be classroom trained on the use of the plays. Others use e-learning with varying degrees of discipline. Some require no follow-on testing; others require their people to take an exam with a 100% pass rate. Increasingly, sales leaders are taking their training concept one step further—with sales certification. They enable their sales teams with plays and then measure their ability to articulate the value of their solution suite, whatever the selling situation. As far as making the use of playbooks stick, management-required certification is the stickiest.

How would you summarize the benefits of using playbooks?

BUCHANAN: One, a playbook is a simple, consistent, scalable approach to sales competency. Two, it is field deployable, no instructions necessary. New salespeople can learn from all who have sold before them. Three, the cost is incremental; it scales.

Here's an example. One of our technology clients had a best practices group for major software sales. With the downturn in the economy, they couldn't afford the best practices group. But by investing in a sales playbook, they leveraged the accumulated wisdom of that group across the organization. Everyone in their selling organization is now the best practices group.

So you're a fan?

BUCHANAN: Absolutely! The sports analogy is overused, but the use of best practices sales plays are like muscle training. With every repetition, you get stronger.

Critical Path Strategies is in the business of helping sales leaders develop effective selling organizations that support sales sustainability and the revenue engine. Toward this end, sales playbooks produce self-sufficient sales teams who accurately assess and address selling challenges. They provide concise, just-in-time, market-ready plays for articulating solution benefits in resource-efficient, business-effective ways. The end result? Shortened sales cycles, increased win rates, and faster on boarding of new salespeople. What's not to like?

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