

Template to setup your Sales Playbook

Company Focus – These are questions to ask your leadership team.
Examples are for our business, Passle.

How will we reach company objectives?

By working as a team and consistently educating the market, prospects and clients. We will make our clients advocates at all levels of the business through our premium technology and service.

Why do we exist?

To help our customers build trusted relationships with their audiences to drive business growth and increase the amount of expert-led, high value content online.

How do we behave?

With credibility and confidence in the best interests of our clients whilst working as a team.

What do we do?

We enable organisations to drive business growth through capturing the knowledge of their internal experts, with ease and delivering this directly to their key audiences to strengthen and create key relationships, as a firm.

Operations

1. Facetime

Qualification to warrant your time visiting a client is key. However, once you have determined a positive fit and business need, spend as much time seeing your clients and at their offices. We have a great setup at our company so also invite clients to our building and introduce other members of the team strategically.

2. Nurture

Produce and send specific content to clients however you can also create FOMO by sharing your client's examples on a regular basis to prospects AND existing clients who need a nudge.

3. Why should I log meeting notes?

Clearly it is a useful record for when you make that next phone call. Understanding who is involved in a deal, any surprises, licensing discussed etc

However, it is also an opportunity to review your meeting and at a different time when you have lower workload and high capacity to think.

If you attended with another person sit together and write the notes. It is always easier to do this when someone dictates!

Your notes should also be a source for your personal content/marketing efforts.

4. Content is a product of listening to your client

Content produced should be answering a client pain. Any piece produced you should be able to directly relate it to a current client engagement.

This challenges you to qualify and listen to your clients.

5. Events

Events are key to your business development. Look at your data to demonstrate this. It is still one of the best ways to open a conversation. Knowing which events to attend can be a challenge, asking your prospects/clients or reviewing what they share online can help so you make the most of your team.

It is also a great way to understand your clients market place.

Example: The future of finance and insurance effects everyone. When will amazon start offering insurance? When will bank branches disappear? This impacts all industries (lawyers, SITS, consultants, accountants) and if you can demonstrate a level of appreciation for these pains it is going to help you build key relationships.

6. If you are a goal keeper don't practice corners

The football analogy comes from committing to a discipline and sticking to it. A top goal keeper will not practice his corners.

You must set targets, focus, commit and execute. Creating a plan, working hard and smart is all that is required and asked. Success will come.

7. How do you measure success?

Key metrics to keep in mind when managing your workload include:

- Opportunities Created and their value. Should any opportunity be lower than your minimum selling price?
- Events attended. What do you have in the next 2-4 weeks?
- Meetings attended.
- Proposals sent and the outcome. Pointdrive, are your proposals being read?
- 1-2-1 timely, personalised and expert content sent to the right people
- Content written specifically for a client. What is your goal with content and are you achieving it?

8. Wake up and read a report

To help focus each week you can use sales leading indicators (send proposal, make specific calls, attend events, create content), these are driven by an overriding objective of closing deals. On a day-to-day basis these are easily reviewed. Reviewing this first thing in the morning will really help focus your efforts. In addition, your active pipeline in CRM. Reports can be found [here \(insert\)](#). Start each day with a water/coffee/tea and review of your reports.

9. Think Big and Get Excited

There is no doubt that your solution can add value to a business in multiple ways. Whilst we must focus on the exact business need it is important to think and talk big from the outset.

It helps anchor licensing and prioritise for the prospect. Your research in a company should help you authentically do this.

10. Sales is a team sport

Everyone in your business has unique, high-value skills. Discussing deals, ideas with all different members will help. Equally sharing your colleagues content or even asking a colleague to write content will help demonstrate the depth of expertise within your business and that you work cohesively.

11. Preparation is the majority of a positive outcome

Just feeling prepared will translate into a relaxed and focused approach in the meeting.

Points to review in order to do this:

- Understand the prospects business and products
- Understand the prospects requirements
- Think about potential objectives
- Understand the personal and company motivations for all those involved in the deal
- Who are the key stakeholders (Opponent of the sale, proponent of the sale, decision maker, other stakeholders)?

12. Credibility and Confidence

Selling a premium product requires the sales person to appear credible from the clothes they wear to the note pad, presentation and confidence in price.

Always aspire to 'dress' for the position you wish to be in (that matches your role) and it can be useful to benchmark yourself against the worse too!

13. Premium

Passle is a premium product and inline with credibility, everything must be premium from the calendar invite you write to the delivery of pricing.

14. Always get a time in the diary

Whether it is a quick catch-up or a pitch, find a way to lock in a time with the prospect when communicating on the phone or email.

15. Review

Reviewing is critical in any business. Pilots in particular will review before, during and after flights. The temptation, particularly after a success(ful flight) is to not review. Constantly share mental models to ensure all team members are working towards the same goal. Making sure you have time to review pitches (before/after), accounts and practices will help us move forward.

A few additional notes...

How to qualify?

M – Building Important Metrics. Quantifiable measurement with a monetary benefit.

E – Access the Economic Buyer. The person is an account with discretionary use of funds.

D- Understand the Decision Process. Approval, validation process. The steps involved for an account to .evaluate and implement a solution.

D – Define, Influence the Decision Criteria. Their shopping list.

I – Identify Pain in the organisation. Identify a compelling event.

C – Champions. People with power and influence who are willing to sell for you.

What to do with an inbound?

1. Phone first, email second

Phoning makes it easier for the inbound to commit to a meeting. You can compare diaries there and then. Ask qualification questions.

2. A winning phone call will include:

- introduce the value of your product
- Provide success stories and leverage people closest to your prospect (former colleague or someone with public kudos)
- Understand the experience the prospect has had with other relevant technologies or services (agencies, copywriters)
- Don't give out detailed pricing until they truly understand the value
- Confirm a meeting or next step

3. Track all of the above within your CRM

What to do leading up to a pitch?

1. Research the people and company you will meet and who you want to meet
 - start with Google, Twitter (tweetdeck), LinkedIn, Instagram, Company Website,
 - What content are they producing or sharing?
2. Enter all stakeholders (Opponent of the sale, proponent of the sale, decision maker, other stakeholders) details into Insightly
3. Map an influence plan
4. Open an opportunity
5. Put time in your calendar for the follow-up during the same day

During the meeting make sure you involve the names of suspected stakeholders who are not in the room. This piece of qualification will help with understanding who signs your order form!

What does a winning pitch look like (apart from a confirmed deal!)

1. A next step with date attached
2. Introductions and a meeting with additional stakeholders not in the room
3. To help position your product or service, a full understanding of the prospects company, team and personal objectives

What to do after a pitch?

1. Log meetings in CRM
2. Send an ISTATOY relevant to the meeting
3. Connect with additional parties on LinkedIn/Twitter
4. Send a follow-up email asap
5. Have a firm next step and log this in Insightly Tasks/Calendar
6. Nurture
7. Explore the wider account
8. Share the experience

What to do when a deal closes?

1. Process paperwork for Accounts. Do not press closed won in CRM until the accounts team is notified
2. Brief client success with the account and book time with the correct person to plan the launch internally.
3. Maintain relationship with your key stakeholders for upsell.
4. Keep adding value to the client, not just to upsell the account but also to make the client a lead generation machine. They are likely to be talking to their peer group, what happens after you sign paperwork is important.