THE HIGH PERFORMANCE SALES JOURNEY

EVOLVING TO SERVE TODAY'S SOPHISTICATED CUSTOMER

KEN REVENAUGH

CHAPTER 7

SALES PLAYBOOK

"Disciplined people who engage in disciplined thought and who take disciplined action–operating with freedom within a framework of responsibilities–this is the cornerstone of a culture that creates greatness."

- Jim Collins, Good to Great

7.0 Sales Playbook

How to develop a sales process that leverages top performer success and best-in-class methodologies

Winning Plays

A well-designed Sales Playbook allows you to share the most successful accumulated knowledge about how to sell your organization's product.

It is down to the wire. Only 19 seconds on the clock. Your team needs a touchdown to pull ahead and win the game. As the quarterback, what play do you call? Do you make it up on the spot? No, you rely on the team's playbook, replete with proven plays for the situation you're in. Once the play is called, everyone knows what to do and what role they should play—and it leads to victory!

A sports playbook outlines a team's winning tactics and provides a written guide of proven techniques. Even sixth-grade football teams rely on a playbook. Selling is clearly a lot more complicated than what a group of 12-year olds are doing on the field, so doesn't it makes sense to have a written guide of "go-to" plays for your sales force?

Why Sales Playbooks Help

A Sales Playbook documents organizational, industry and general selling best practices; it is founded on customer buying model insights. When used appropriately, a playbook leads to more consistent sales force performance, ultimately resulting in:

- Greater transparency into the sales pipeline (better and more accurate forecasting)
- Increased wins
- Better coaching (improved sales performance)
- Improved understanding of trends, changes in customer behavior, market dynamics, etc.

A playbook will help shift your performance bell curve to increase the number of disciplined, high performers on your team who know exactly how to approach the customer (Figure 1). The alternative? Lots of middle-of-the pack players who react to each situation randomly.

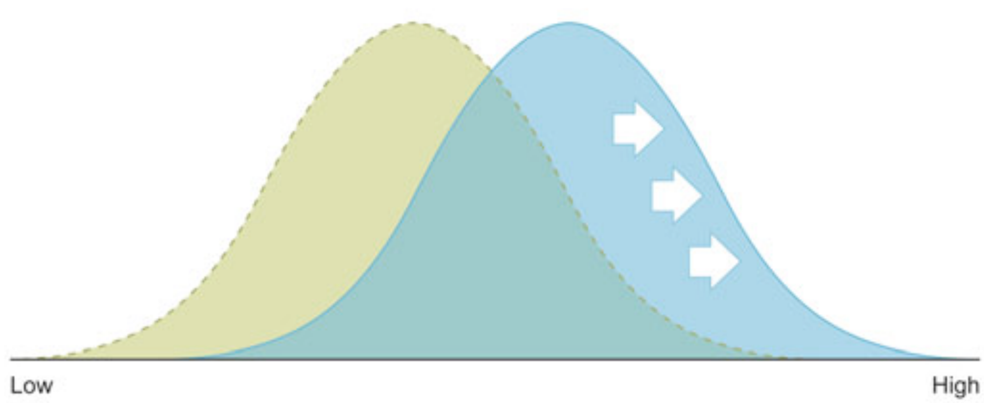


Figure 1. Improving Performance
Identifying top performers' best practices helps shift your performance bell curve to increase the number of highly-successful salespeople within your organization.

Creating a Sales Playbook allows you to learn and evaluate why and how your best salespeople are winning at each stage of the buying process. It establishes a proven set of guidelines, helps managers coach and salespeople sell. Once the whole team knows how to make the top plays, everyone has a chance to score more often.

"Creating successful playbooks demands that sales and marketing functions work closely together to build and refine the targeted and integrated content, tools, tactics and strategies that are aligned with sales process and tuned to the specific selling scenario."

- SiriusDecisions

Why call it a *Sales Playbook* and not a sales process guide? Face it—salespeople don't like designated processes, rules or guidelines. But who can resist using a tool that shares top performers' and top earners' plays? The playbook metaphor will resonate with salespeople and can act as your Trojan horse; you'll be able to implement the process and avoid resistance!

Also keep in mind how important it is to design a playbook that allows some freedom within the framework. Do not be so prescriptive that you tie your sales teams' hands. You need to encourage your sales force to think critically and to be innovative and creative as they react to situations in the field.

In this chapter, we walk you through the step-by-step playbook creating process and illustrate how to leverage top-performer activities and best-in-class methodologies. The main sections of this chapter address:

- 7.1 Problem
- 7.2 Approach
- 7.3 Deliverables
- 7.4 Outcomes

7.1 Problem

While most businesses have the key sales process stages in place, they lack a comprehensive, step-by-step, written game plan that helps them move swiftly across the playing field. Some who do have a playbook struggle to institutionalize it across the organization. Figure 2 below illustrates that most companies have defined and communicated high-level sales process milestones, but they don't document who the players are, what activities are involved or what tools to use.

Key Stages
The milestones of the sales process have been identified

Sales Process Mapping
Currently, the participants, activities, and tools are unclear.

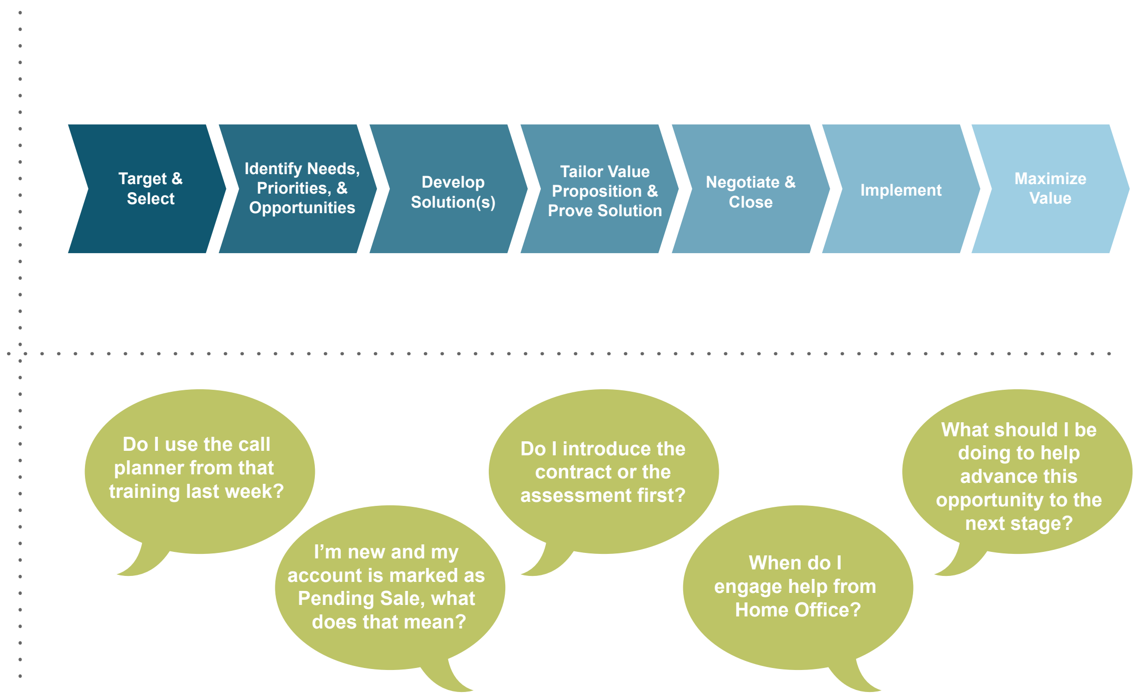


Figure 2. Common Sales Pitfall
Most companies define and communicate their sales process' high-level milestones. However, when they neglect to document the participants, activities and tools within each stage, confusion results and sales performance is inconsistent throughout the organization.

Top performers usually use a variety of selling techniques, which makes it difficult to harness and replicate what is working. The challenge is to correctly identify best practices. Once identified, those "plays" can be the basis of a Sales Playbook that expands best practices into day-to-day operations—for everyone! A formal playbook eliminates confusion and is as crucial to each sales person as a game-day playbook is to a quarterback.

7.2 Approach

With the goal of compiling a series of winning plays for your team, where do you start? A successful playbook project requires extensive research, engages multiple perspectives and involves three key phases—the "ABC" approach shown in Figure 3 below.

Phase I: Assess *Buying Process & Best Practices.*	*Phase II: Build* *...the Sales Playbook.*	*Phase III: Commit* *...to a rollout plan.*
2 Weeks	**3 Weeks**	**1 Week**
Key Activities	**Key Activities**	**Key Activities**
▪ Conduct immersion interviews with stakeholders to identify needs and requirements. ▪ Review current sales process materials, tools and customer research. ▪ Conduct one-on-one interviews with top performers to uncover customer buying process and sales process best practices.	▪ Consolidate research and interviews into preliminary Sales Playbook blueprint. ▪ Refine Sales Playbook via two working sessions. ▪ Identify any change management challenges.	▪ Develop preliminary rollout plan. ▪ Collaborate with core team to revise rollout plan. ▪ Meet with steering committee to gain approval for rollout plan.
Deliverable(s):	**Deliverable(s):**	**Deliverable(s):**
▪ Proposed Sales Playbook template/format ▪ Summary of immersion insights	▪ Final Sales Playbook	▪ Rollout plan; including activities, timeline and responsibilities ▪ Identify requirements for possible integration to Knowledge Community.

Figure 3. The ABC Approach
Accessing best practices, Building a playbook and Committing to a rollout produces a winning playbook for your sales team and can be accomplished in as little as six weeks.

7.2.1 Phase 1: Assess Buying Processes and Best Practices

Phase I
Assess Buying Process and Best Practices

Like a coach preparing players for game day, you must have a clear picture of your team's abilities so you can create plays that accentuate strengths and mitigate weaknesses. The playbook journey begins by performing intensive quantitative and qualitative research to identify top performer success factors, as demonstrated in Figure 4 (next page).

"[Once] you know what's important to your prospects, you take a look at their decision making process. With a deeper understanding of how they think about change initiatives, you'll be better able to serve their business needs at the same time you increase your personal value to them."

- Jill Konrath

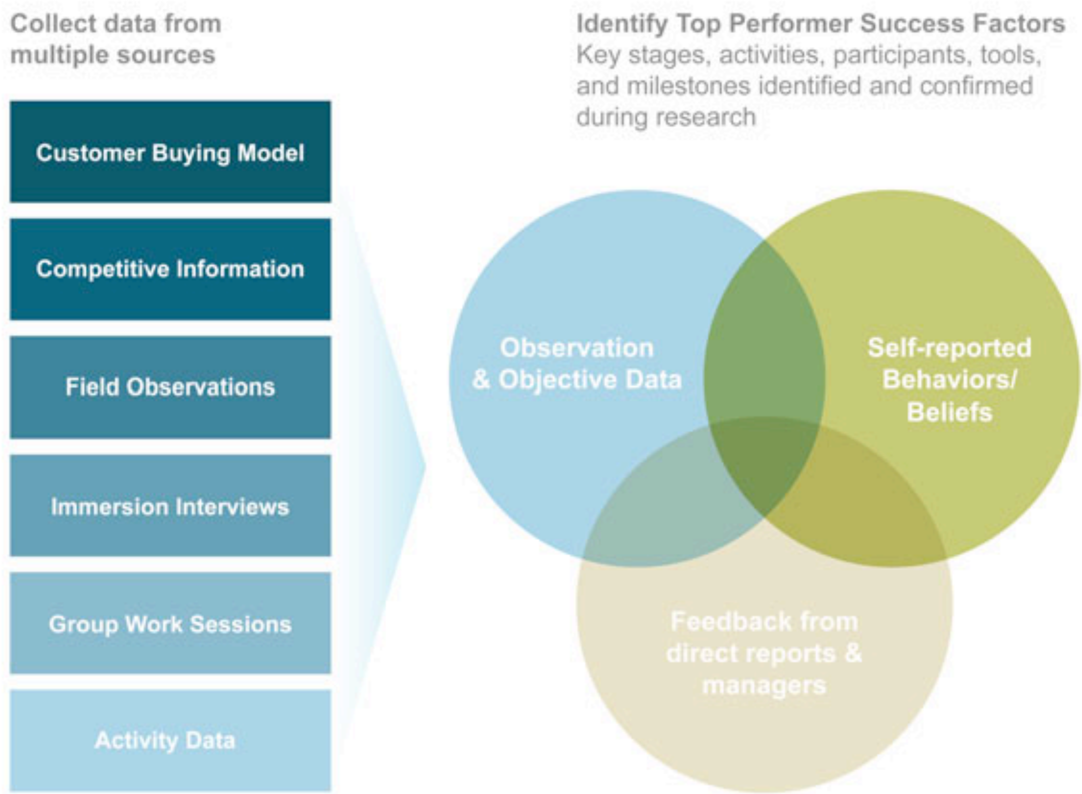


Figure 4. Identifying Top Performer Success Factors.
Engaging multiple perspectives in Phase I research uncovers the most effective ways to sell your company's product. This is accomplished through direct observation, self-reported behaviors and beliefs, as well as feedback from direct reports and managers.

To obtain vital information about how the best players on your team get things done, you must:

- Evaluate how sales currently happen
- Engage multiple perspectives
- Establish a detailed plan
- Develop a pre-immersion study
- Conduct immersion interviews
- Administer a quantitative survey
- Collect activity data
- Identify process improvements and best practices

Evaluate How Sales Currently Happen

Begin by reviewing current materials, tools, customer research and competitive intelligence. Identify gaps and/or outdated information. Remember, the goal of your research efforts is not only to uncover best sales practices, but to correctly assess the customer buying model. Including customers in your research is the best way to find out how they prefer to buy, but you will also learn customer preferences from top-performing sales professionals.

The "A" in the ABCs of a Sales Process

Accurately assessing your current sales process is vital. Keep in mind that the goal of research efforts is not only to uncover best sales practices, but to correctly assess the customer buying model.

When evaluating the current process, identify tasks that could be completed or supported by other departments or outsourced to vendors (administrative work, research, product implementation, etc.). Shipley Associates, a successful proposal management consulting firm, says companies can increase their capture/win rate by an average of 60% if they simply establish a formal business development lifecycle. Similarly, streamlining the sales process results in more time for the team to sell— and thus increases company revenue.

Engage Multiple Perspectives

Just as a quarterback has a different job and different skills from a tight end (and you couldn't play the game without everyone's participation), individual team members each have something valuable to contribute. Developing a new sales process should involve a cross-functional team consisting of sales, marketing, learning and development, operations and IT. Key players in a successful Sales Playbook initiative include the:

- Steering Committee
- Subject Matter Experts (SMEs)
- Core Team
- Project Management Team (PMT)

Engaging a wide-range of team members at the beginning of the journey generates company-wide momentum for the Sales Playbook and facilitates buy-in and adoption at all levels of the organization. It is important to understand that at least one executive team member must sponsor the Steering Committee. Unless someone in a high position within the organization champions the project, obtains funding and removes obstacles, the playbook initiative will die.

To achieve playbook goals, you must not only involve team members early on, but also clearly define their roles (Figure 5, next page).

Figure 5. Clearly Defined Roles and Responsibilities.
Establishing clear expectations during the Playbook planning kickoff meeting increases buy-in at all levels, accelerates decision making, ensures accountability and avoids duplication of efforts.

"Unless commitment is made, there are only promises and hopes; but no plans."

- Peter F.Drucker

Establish a Detailed Plan

Establishing a detailed project plan with milestone tasks, owners and due dates, keeps the Sales Playbook initiative moving forward. It provides an effective tool for monitoring progress during each phase of the project. Additionally, setting up key meetings is crucial to achieving a tight timeline. (Even a well-oiled team needs to huddle throughout the game.) An effective project meeting schedule communicates the meeting type, objectives, participants, format and timing, as demonstrated in Figure 6 (next page).

Meeting	Objectives	Participants	Format & Timing
Core Team Kickoff	▪ Introduce project plan and objectives ▪ Discuss characteristics of a good sales process	Core Team PMT	2-hour meeting or conference call 5/5
Immersion Interviews	▪ Uncover customer buying process ▪ Capture selling process best practices and improvement ideas ▪ Assess variability and change management challenges	SMEs Select Core Team members Select Customers	1-on-1 interviews with PMT 1-2 hours, in person or over phone Weeks of 5/8 – 5/22
Core Team Work Session 1	▪ Agree to high-level sales stages as a full team ▪ In breakout groups, refine sales process steps	Core Team PMT	1-day meeting in Dallas 5/18 or 5/19
Core Team Work Session 2	▪ Review and refine integrated Sales Playbook proposal ▪ Develop rollout plan	Core Team PMT	1-day meeting in Dallas Week of 5/29 or 6/5
Recommendations Meeting	▪ Present Sales Playbook and rollout plan to Steering Committee ▪ Gain support for next steps	Steering Committee Core Team PMT	½-day meeting in Dallas Week of 6/5 or 6/12

Figure 6. Detailed Meeting Schedule
Organizing key meetings in advance keeps the Sales Playbook initiative moving forward and helps the team achieve tight time frames

Table 1 below outlines additional project management tools to guide the Sales Playbook process during Phase 1.

Table 1. Successfully Managing Phase 1 Activities	
Project Management Tools	Description/Purpose
Core Team Introduction	A respected person in the company writes a message communicating the importance of their roles / responsibilities.
Brand the effort	Give the project a brand to identify it as specific initiative you will discuss and reference with clarity
Sales Playbook Kick-off meeting	Opportunity to outline the project roadmap for everyone involved to communicate ▪ Reasons for beginning the initiative ▪ Importance of the project ▪ Who is involved ▪ What is required ▪ Timelines / expected deliverables.
Immersion Interviews Guide	A clear set of questions to guide immersion interviews with all subject matter experts (to understand what is working and areas of improvement

Develop a Pre-Immersion Study

In order to conduct valuable immersion interviews, you must have a basic understanding of the sales organization and how it is functioning. If you already have this information, proceed directly to “Conducting Immersion Interviews.” However, if you are new to the sales organization or unsure of current processes, conducting a pre-immersion study will help you establish a general understanding of the customer buying process, potential issues and obstacles, etc.

A pre-immersion study consists of a short, anonymous survey of the entire sales force. Questions should be very general, such as:

- Do you have a documented process you use to guide your sales opportunities?
- Do you have a method to identify key buyers during a sale?
- Do you know when and how to engage internal SME resources?
- Do you know what your win percentage is by deal type?
- Do you know at what point in the sales cycle you win or lose?
- Do you know how to forecast deals accurately?
- Do you have a clear definition of what an opportunity is?

Taking the time to conduct this study yields three important things: 1) data to support the playbook initiative, 2) a great starter for the first meeting and 3) insight for creating the right immersion interview questions. An added bonus - involving the entire sales force in this first step helps establish team buy-in early on in the initiative.

Conduct Immersion Interviews

> ***You Don’t Have to Re-create the Wheel!***
> *Often times you will find that documentation for many winning plays already exists—those techniques just haven’t been implemented and adopted. One-one-one interviews are the key to collecting both documented and undocumented plays.*

One-on-one immersion interviews are key to discovering and collecting winning plays for the Sales Playbook. Interviews with stakeholders provide valuable information about needs and requirements within the sales organization. Meeting one-on-one with top performers to interview them and observe their day-to-day performance directly yields insight about:

- Customer buying process
- Sales process best practices
- What *not* to do

You will learn things during interviews you can test with a much wider population. For example, you may learn during several interviews that you have a bottleneck in your sales process at the contracting phase; salespeople may spend 40+ hours working through the contract. After confirming this information with a broader group, you will be able to tackle streamlining this arduous process for the sales force.

But remember, your goal is not to solve tactical bottlenecks around the organization, it is to build a winning playbook. It is important to keep the group focused on the original charter, or the group can quickly turn into a problem solving task force. If you do find issues per this example, tell the team you will get a different task force to resolve and make sure it is done.

Administer a Quantitative Survey

Since you cannot meet with every salesperson, use information from the immersion interviews to create survey questions that will help you identify consistent concerns across the entire team. A well-written survey allows you to capture opinions from the entire sales force and other stakeholders.

Collect Activity Data

Time & Money Saver

Engage a college intern to conduct "ride alongs" with sales team members. The intern's job is to observe and obtain valuable experience and you acquire vital sales activity data and documentation. This technique is effective, inexpensive and non-threatening.

233 yards rushing. 520 yards passing. Three turnovers in the first half. Why are statistics such an important part of sports? They provide valuable information for coaches and players. Activity data from your sales force is critical to help you identify trends and winning techniques.

If your company uses a Customer Relationship Management (CRM) database, you probably already have access to vital statistics such as how many appointments and/or sales presentations it takes to close a deal. If no database exists, you can obtain this critical information by conducting a simple "time spend study." Identify a random sample (approximately 5%) of your sales force to log activities in a spreadsheet in 30-minute increments over a period of two weeks.

Identify Process Improvements and Best Practices

Throughout Phases 1 and 2, you will be doing some type of process mapping—drawing out key steps in the sales process. You can accomplish this using a white board or on butcher paper (just like a coach in the locker room), or by using an electronic tool such as Visio to cleanly outline the entire decision path.

No matter how you do it, you will begin to see areas for player improvement. You will learn how top performers have figured out how to skip steps or move closer to a goal in a tough game. You have two options for improvement, either 1) simplify the current process or 2) develop a new, more efficient procedure.

"As you shape and modify your self-image so that it is similar to that of the best salespeople, you will begin to see improvement in your sales performance faster than by anything else you could do."

- Brian Tracy
Advanced Selling Strategies

A true best practice is a different way of doing something that:

- Can be effectively implemented across the organization
- Can be described in flowchart format
- Results in aggregate improvements in customer service and an ROI-positive cost of time and expense
- Will replace the current process
- Can be taught, coached and replicated to a broader set of people

Phase 2: Build the Sales Playbook

Phase II

Building the Sales Playbook

In Phase I, you gathered and assessed all necessary data—participant roles within each stage and customer buying model insights and best practice activities and tools. You are ready to move on to the next phase of the ABC approach and actually build the Sales Playbook. To accomplish this, you must:

- Develop and refine process improvements
- Consolidate research and refine content
- Establish a knowledge-sharing platform
- Organize group work sessions
- Design the playbook “look and feel”

Develop and Refine Process Improvements

Map It Out

Just like a coach gathers players at half time and draws winning plays on the locker room white board, make sure you perform some type of process mapping to outline the entire sales decision path.

Remember the work you did assessing your team and identifying process improvements? Now is a good time to evaluate the process map and to be sure you removed unnecessary activities from front-line sellers and managers. Centralize those tasks at headquarters, outsource to a partner or augment the process by using better technology or tools.

Table 2 shows examples of ways to streamline the sales process so team members can spend more time selling (and less time performing administrative work, research, implementation, etc.).

Table 2. Streamlining Sales Process Tasks and Activities

Outsourcing Examples	Centralizing Examples	Augmenting Example	Aligning Examples
▪ Leverage Bulldog Solutions, a lead generation company, to develop leads. ▪ Use West Corporation, a telesales organization, to handle the qualification phase of a lead. ▪ Use Shipley Associates to handle RFP/Bid responses.	▪ Develop a contract management office to handle contract administration. ▪ Build an implementation team to help complex customers transition to your services. ▪ Develop a National Account Coordination team to help Strategic Account Managers coordinate the moving pieces of a complex account.	▪ Use a service that harnesses and filters a wealth of online data—including news stories, company profiles, content from social networks and more. This helps sales teams stay one step ahead of the competition. (Providers include OnSource’s iSell, Hoovers and Inside View.)	▪ Engage marketing resources in the field. ▪ Align marketing resources and materials to the playbook. ▪ Align metrics needs across the organization.

Consolidate Research and Refine Content

With your knowledge-sharing platform established and process improvements identified, you are ready to carefully review the information collected through immersion interviews, field observations, group work sessions and activity data. First, focus on revising the high-level stages of your company’s sales process. Next, further sub-divide those stages as required. Finally, clearly define the tools, activities and participant roles within each stage/sub-stage and make sure they align with your company’s value proposition.

Be Prepared to Face the Opponent

As you consolidate your playbook content, identify gaps in processes, resources, etc. Also, select a team member to be responsible for regular updates so your sales force is always prepared to face the opponent!

Be sure it is clear what role everyone will play in creating and maintaining the playbook. Make a list that includes: Who will be responsible for the content? Who will update it? What is the schedule? Where does it reside? What tools and systems will be incorporated?

For example, Figure 8 illustrates possible playbook material for the “Identify Opportunity” stage of selling. The figure refines this stage as four additional sub-categories (steps A, B, C and D). For each step, it maps out required activities, participants and tools, and provides the sales team with tried and true plays to run on a daily basis.

Stage	**Identify Opportunity** A: Profile Account	**Identify Opportunity** B: Prepare Account Plan	**Identify Opportunity** C: Verify Account Potential	**Identify Opportunity** D: Finalize Action Plan
Activities	▪ Assess historical & current relationships with firm ▪ Research account’s financial position, competitive landscape, & strategy ▪ Make strategic calls for further discovery ▪ Query other divisions for info	▪ Complete Client Profile in account plan ▪ Identify key client personnel ▪ Schedule discovery meetings with key client personnel ▪ Review Client profile with Service Center Manager	▪ Review Discovery Questions ▪ Prepare Discover meeting agenda ▪ Hold meetings with key client personnel ▪ Identify Key Business Issues ▪ Perform additional account research	▪ Update and refine account plan document ▪ Determine and prioritize Single Sales Opportunities ▪ Update & refine action plan ▪ Review account plan with Sales Manager ▪ Answer unresolved questions
Participants	▪ Responsible: Sales Professional ▪ Resource: AR, Sales Reporting, Service Center Team Members	▪ Responsible: Sales Professional Service Center Manager ▪ Resource: Sales Manager, Peers, District Manager	▪ Responsible: Sales Professional ▪ Resource: Sales Manager, Peers	▪ Responsible: Sales Professional ▪ Resource: Sales Manager, Peers, Solutions Group
Tools	▪ OneSource ▪ CRM/SFA ▪ AR Reports ▪ Publicly available financial reports	▪ Sales Knowledge Community ▪ Value Proposition Training ▪ Account plan document	▪ Discovery Questions ▪ Meeting Agenda ▪ Six Critical Skills Training ▪ Key Business Issue Tool ▪ Discovery Questions	▪ Account plan document ▪ Guidelines for Single Sales Opportunities ▪ Guidelines for engaging Solutions Group

Figure 8. The Devil is in the Details.

Clearly mapping out the activities, participants and tools associated with each stage of the sales process (in this example, the “Identify Opportunity” phase), provides your sales force with practical, concrete “winning plays.” New hires to seasoned team members all have access to a step-by-step guide of proven strategies and techniques, resulting in more consistent performance throughout the organization.

Unifying the Team

During playbook content review sessions you will likely find that many top performers do similar things, but probably don't use the same vernacular to describe their best practices. To avoid getting hung up on semantics, consider integrating a proven sales methodology process into your playbook—effectively eliminating time wasted debating the best sales terminology to use.

Once you have a solid first draft, conduct at least two review sessions with your cross-functional team to further refine content. Present a synthesis of immersion findings and review the playbook in a simple, table format. Conduct review exercises aimed at reaching consensus about each key section.

Remember, often this is the first time top performers have articulated and explained their best practices. During these sessions, you will likely find that many of the top performers have similar practices, but probably don't use the same vernacular to describe them. If you find this is the case, it may take a while to get everyone to reach consensus about how to describe and train each other on these activities. To avoid getting hung up on semantics and naming, you may want to consider integrating a proven sales methodology process into your playbook. (If the methodology chosen does not define a specific term, just call it something and agree to revisit the naming convention later.)

For example, during one review session at a hospitality firm, top performers all identified they had received assistance from customers that aided them in winning a deal. One participant called this person an "advocate," another made reference to a "coach" and still another said a "champion" helped them. We could have spent an hour deciding the best term to use. Luckily, Miller Heiman (our agreed-upon methodology) clearly identified the buyer as a "coach." If you encounter this situation, there are many sales methodology vendors to evaluate for integration into your playbook, including:

- Achieve Global
- CCI's customer centric selling
- Corporate Visions
- Holden Power Base Selling
- Infomentis
- Miller Heiman
- Richardson
- Sandler
- SPI Solution Selling
- SPIN
- Target Account Selling (TAS)
- The Complex Sell

Establish a Knowledge-Sharing Platform

Why establish a Knowledge-Sharing Platform?

Imagine a stadium with unnumbered seats. Even if you know where your section is, finding and claiming your spot is complicated. Similarly, with no organized portal for finding relevant information, your sales team is at a disadvantage.

With an initial understanding of the activities and tools required for each sales process stage, you are ready to decide how to share playbook knowledge within your organization. Identify which departments and personnel outside of sales will benefit from access to playbook content (pricing, operations, etc.). Determine the best place to consolidate playbook information, as well as how to deliver it.

A simple, printed Sales Playbook is a good start. Making the printed version available online increases adoption among the sales force. Additionally, in this age of complex selling environments, a knowledge-sharing platform (such as an online portal) provides the ideal way to communicate best practices.

Why establish such a platform? Picture a stadium with unnumbered seats. You need to find your aisle and row before the game, but with no numbers, you could wander for hours before finding your place. That is what it is like for a sales person trying to establish a game plan in the organization with no organized portal for finding relevant information.

Think of the time, energy and cost that go into finding a sales asset when it is not readily assessable. Most organizations invest a lot of money just getting their sales force in front of a client. But, what does it take to get salespeople ready to be successful for that crucial meeting? They need immediate, user-friendly access to best practices—tools, processes, skills and knowledge.

You have a choice of a broad-range of knowledge-sharing platform options. Figure 7 (next page) shows the levels of performance and investment required when deciding what type of platform to implement.

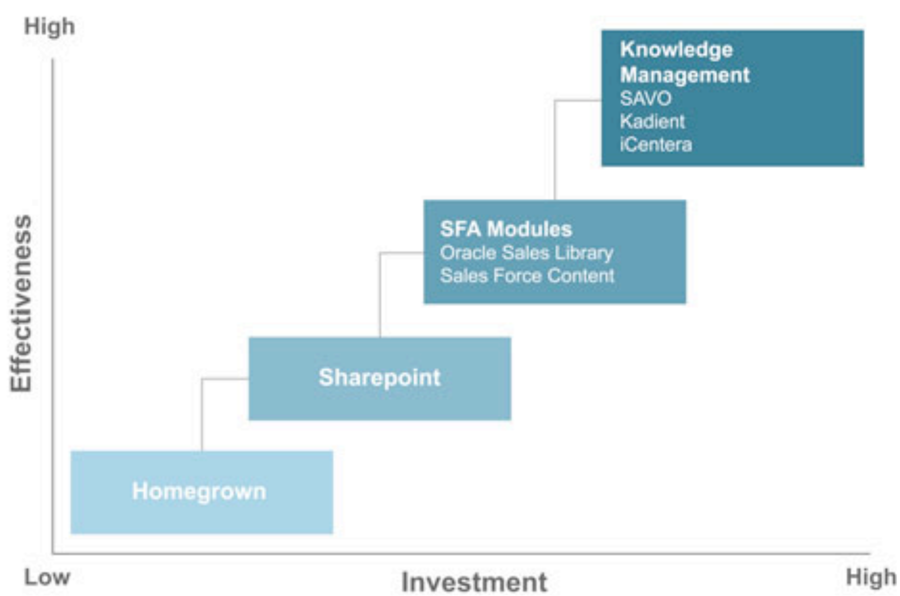


Figure 7. Selecting a Knowledge-Sharing Platform.
A substantial investment in technology yields increased levels of peformance—the sales force has all of the best practice tools and knowledge they need at their fingertips.

Additionally, during the "Build Phase" of the process, you should evaluate how to integrate the playbook into your Customer Relationship Management and Sales Force Automation (CRM/SFA) system. Integrating playbook content into the opportunity management and forecasting functions provides the sales force with a concrete tool for defeating competitors. Table 3 below shows some common mistakes and how to avoid them.

Table 3. Integrating Playbook Enhancements Into a CRM/SFA	
Common Mistakes	Better Way
Implementing enhancements from an "IT only" perspective, resulting in forecasting functionality that is neither user-friendly nor intuitive.	Obtain sales team input early in the development and testing phases. Do not go live with enhancements the sales organization has never seen before.
Creating burdensome data entry requirements, deterring salespeople from using the tool.	Design enhancements so the sales team can easily and quickly access client issues, driving forces, players and politics influencing the deal, the decision-making process and competitive traps.
Pressuring salespeople into immediately entering opportunities they create into the forecasting tool.	Encourage salespeople to follow the process outlined in the Sales Playbook so opportunities get started the right way. This eliminates "fixing" the deal at the end because a salesperson hid the opportunity until it was ready to forecast.

Coaching Tip

"Sales" is a noun representing people, assets and costs. An effective playbook focuses on "selling"—a verb. As a coach, that is the skill you are improving in your players!

Organize Group Work Sessions

Organizing group work sessions with the core team to provide feedback about findings helps uncover additional insights into the sales process. Discussions beginning with "Is this really a best practice?" usually end with many team members affirming *why* it is so, adding that it is "*their* own best practice," too—facilitating adoption and buy-in by the entire team.

Table 4 (next page) shows suggested agenda and presentation content to help you facilitate successful group work sessions.

Table 4. Facilitating Successful Group Work Sessions	
Project Management Tools	Description / Process
Work Session #1 Agenda	▪ Determine a brand name ▪ Set the vision and get buy in ▪ Recognize the team for their top performance ▪ Opportunity to assemble the core team (in person) to review a synthesis of immersion findings ▪ An early view of the playbook ▪ Team works through exercises to refine the draft playbook: ✓ Key Exercises – Focus on a methodical approach to reviewing and reaching consensus for each key section. ✓ Alternate Process Exercise – Meant to spur innovative thinking that may uncover sales process steps, activities or tools that have not yet been defined. ▪ Use stories to illustrate key components of the sales process. In advance of the meeting, ask each participant to complete a brief questionnaire about one of their most significant wins.
Work Session #1 Presentation	Present the complete synthesis of immersion interviews, including: ▪ General findings and voice of the subject matter experts and customers. ▪ Draft version of the Sales Playbook in simple table format for review in the exercises. ▪ Have drafts of “creative."
Work Session #2 Agenda	Agenda includes the same exercises used in Work Session #1, but requires less time. Many items are closed issues because the group has already reached consensus in Work Session #1.
Work Session #2 Presentation	Present the Sales Playbook in a simple table format. Includes all refinements and any new content development assigned during Work Session #1.

Team Colors and Branding

The end of Phase 2 presents the perfect opportunity to streamline the design aspect of your Sales Playbook and support materials/tools. What "look and feel" best represents your company and what your team has to offer?

Design the Playbook "Look and Feel"

This task involves designing a Sales Playbook template, as well as creating the right "image" and branding for client-facing sales materials. Don't underestimate the power of colors, style and presentation. What would you think of a football team that marched on to the field in zebra-striped jerseys? Or completely tan uniforms?

You probably have a myriad of different styles used to present sales and marketing material to clients at this point. Now is the perfect opportunity to streamline the design aspect of your Sales Playbook and supporting materials/tools. What "look and feel" best represents your company and what your team has to offer? Be sure to engage marketing in this effort.

When communicating your vision to a graphic designer, consider using a Creative Brief (Figure 9 next page). This tool describes the look, feel and medium of the final Playbook deliverable and allows a designer to quickly develop sales support tools, such as e-brochures or client questionnaires.

Marketing Creative Brief: (Sales Playbook) **Date:** 09/22/10

(The ideal brief is just that -- brief. Try for a page, two if you must. Extra background info can be attached.)

What do we want to happen as a result of this initiative? *(Every company wants to meet new prospects and increase sales. What new, exciting things do we want to occur?)*

We want the sales professionals and their managers to see this as a necessary daily reference tool they use to review their opportunities and to determine next steps. Ideally, it would be something connected to the Guiding Sales Opportunities component within the Circle of Success. It should be a tool that can be used daily.

Who are we talking to? *(Who is our target audience? Think beyond overly-simplistic gender and age answers. Who are they…really?)*

Account executives... tenured associates, 30-50 years old, 70% female. They don't usually use tools or methodologies; they prefer to "wing it" and do what "feels right." Simplicity is key, but it cannot look like a piece of marketing collateral.

What insights and truths do we know about the target audience that will help us?
(Why are they the way they are? What do they believe? What problem will our client's product solve for them?)

They are not always sure about what to do next. They take the path of least resistance.

How do they feel about the current situation?
(Be brutally honest.)

They are in *Survivor* mode – Outwit, Outplay, Outlast. We need to convey that this tool has permanence and is foundational to everything that will follow.

How do we want them to feel about the Sales Playbook?
(What would improve upon the answer above?)

Leadership wants them to succeed. We hope they will be excited about new tools and the fact that best practices help result in their success.

What's the one KEY FACT we want the target audience to remember?
(This is the heart of the brief. It will lead the Creative Team to the big idea. Your input is crucial.)

Importance of the sales process: Imagery that represents these three factors is important:

1) Always be in seek mode -- identifying new opportunities
2) Manage opportunities from identification through closure
3) Always work to strengthen the relationship

Kind of a User's Guide to Success!

Why should they believe us? *(Any claims we make must be supported by real information. What makes the key fact believable? Bullet points are fine.)*

The Sales Playbook was built internally from our own associates' best practices.

What is the tone and manner we should take?
(This is meant to free up the creative process, not stifle it. Answer carefully.)

Focus on the fact that this is important and permanent, but it's not stodgy. It is forward thinking, but also rooted in what our research shows us that the best, most successful people do every day.

Deliverables: Hard Copy Playbook

Schedule: Need 1st draft by 9/26 COB, Final by 10/2

Figure 9. Creative Brief Sample

Use this tool to clearly communicate your vision for the Sales Playbook and support documents to a graphic designer

Phase 3: Commit to a Rollout Plan

Phase III
Commit to a Rollout Plan

By engaging multiple perspectives throughout Phases 1 and 2, hopefully, you created a high level of buy-in among your players. Armed with a well-designed and documented sales process, the goal of Phase 3 is to commit to rolling out the new process and to achieve rapid adoption. An effective rollout strategy includes:

- Communication planning
- Focusing on “WIIFM” for the sales team
- A pilot program
- A management kick-off
- Formal launch
- Implementation
- Reinforcement

Communication Plan

Communication is key to a successful playbook rollout. You must keep the entire sales organization informed throughout the development process. Sending out regular updates about progress on the playbook (via email, newsletter, etc.) peaks interest and facilitates buy-in. If your playbook constitutes a substantial change to the current sales process, you may want to communicate progress through a monthly sales-wide call.

Focus on “WIIFM for the Sales team”

Regardless of how much practice and preparation you do, all that matters is what happens on the field on game day. If you prescribed every step—down to what players should eat and drink, and what side of the bed they should sleep on the night before—you probably won’t have very high compliance. Remember, the overriding playbook goal was to create a framework and allow your sellers freedom within the framework. To successfully facilitate playbook adoption, focus on “What’s In It For Me” (WIIFM) for the sales team. Your people need to see the playbook as a valuable tool that makes it easier for them to sell.

You have likely created a playbook with five to seven key stages and somewhere around a hundred activities or best practices. Do not expect everyone to adopt all these new guidelines immediately. Instead, decide on 20 (or fewer) activities or best practices to focus on in the first phase of the rollout—and do this from a “WIIFM for the sales team” perspective.

Pilot Program

It is best to pilot the playbook with a good mix of end users, including:

- Star performers
- Middle-of-the-pack players
- New salespeople

The most effective pilot programs involve one or two local teams. Implementing the playbook among a small group allows you to quickly assess what is working and what is not. Piloting the playbook also gives you time to make changes before rolling the new process out to your broader audience.

Management Kick-off

The only way to ensure adoption is to start the rollout process with the leadership team and ensure all of your assistant coaches (managers):

- Believe in the playbook
- Understand the new principles
- Know how to coach the front-line sellers within this new framework

Capture executive support and have them promote the playbook. (Usually the CFO is a huge advocate since the playbook provides a much more consistent pipeline for forecasting.) You need all the muscle from senior management and the rest of the sales team to encourage everyone to be on the same page.

Formal Launch

Now is the time to accelerate your communication plan. You have kept everyone in the organization aware of the playbook during the build process and the pilot, and you must do the same throughout the launch process. Now that you have a solid playbook, get your team excited! Take the time to jazz everyone up for receiving tools and training that will help them win faster and more often.

Energize Your Players!
Take the time to jazz everyone up for receiving tools and training that will help them win faster and more often. Select a theme, use e-mail teasers and send out the first copies of the printed playbook.

Use e-mail teasers to lead up to a sales-force wide launch call endorsed by the head of sales and the team that developed the Sales Playbook. Plan to discuss early successes from the pilot and make sure everyone understands what went into developing this new tool. Don't forget to emphasize how the Playbook will help team members save time and win more!

If you chose to go with a printed playbook, this is a great time to send one out to everyone or to provide first access to the knowledge-sharing platform. Explain to the team they will receive platform training in the near future.

Selecting a theme can help drive points home and convince your audience to act. Table 5 (next page) provides some possible metaphors to help you get your team invested in the new Sales Playbook.

Table 4. Facilitating Successful Group Work Sessions	
Theme	**Description**
Freedom Within a Framework	Imagine an airplane pilot preparing for flight. Some of his actions will be dictated by standard FAA procedures; he will make other decisions on his own. He uses the flight plan his guide, but has the freedom to make critical decision (e.g., adjust for wind sheer or bad weather). However, a framework is necessary to ensure the flight is consistent and safe overall. Now instead of a jet, your team has the responsibility for guiding a multi-million dollar organization, and your cargo is our greatest livelihood—the customer. Think about it, “freedom with in a framework” makes sense. So let’s dive into the flight plan—our new Sales Playbook.
Go-Around Metaphor	Do you know that on United Airlines, you can actually tune the audio earphone to the pilot’s channel and listen to the conversation in the cockpit? Upon descent, if you hear the control tower radio, “Go around,” the pilot will immediately make an abrupt transition from descent to ascent. The pilot will not argue with the tower or ask for further instructions. It is efficient and effective for both the tower and the pilot to understand and use the same terminology.
Lego Activity	Lego building blocks provide a good foundation for creating an experiential learning activity that engages all the senses. This activity always gets rave reviews. 1. Preparation: For every 5-7 people in your audience, purchase a small Lego kit with no more than 25 pieces. Make sure the box includes a photo of the fished product and instructions. Choose small trucks or cars, as people love to build something that can roll. 2. Give very simple instructions to your audience. For example, explain that they are to, “Build a racecar that rolls.” 3. Separate the audience into groups and hand out the boxes. The clincher: give some groups a box of Lego bricks with the instructions, give some only the blocks and the picture of the truck and give the rest of the groups only the Lego pieces. 4. Give the teams 10-15 minutes to build the race car. You are bound to have many variations of the car. Observe the interaction within the teams for debrief. When this activity is done, you will have learned numerous lessons that could tie to your Sales Playbook launch. Results are bound to support a discussion about better communication and improving teamwork, providing consistent instructions, tools and processes. It also inevitably shows the creativity of a few groups that make a very basic truck and often are the first to finish.
Sixth-Grade Football Playbook	This theme follows the thought that everyone has rules and guidelines for success. Accountants have the GAAP accounting rules. Operations teams have Standard Operating Procedures (SOPs). Even sixth-grade football teams have a Playbook. In fact, they have a playbook that is 42 pages long. Selling is probably more complicated than what a sixth-grade football team does, so we can we all agree we probably need our own playbook?

Implementation

Implementing the Sales Playbook is essentially a massive undertaking in "change management." Approaching the rollout this way increases the likelihood of adoption at all levels within your organization. In this section of the chapter, we discuss the following key implementation milestones:

- Identify change management challenges
- Implement change management
- Develop and conduct training

Identify Change Management Challenges

"Effective leaders help others to understand the necessity of change and to accept a common vision of the desired outcome."

- John Kotter
Our Iceberg is Melting

Similar to the dynamics within a large sports organization (consider the Detroit Lions), most sales team do not change easily or quickly. Modifying behavior at both the organizational and individual level is difficult. Salespeople must leave their comfort zones and implement new best practices. Managers have to adjust to overseeing a team that sells in a different way. And other personnel within the organization are required to change the way they support and interact with the sales team.

Given these realities, a large part of implementation planning should focus on identifying and overcoming specific obstacles to adopting the new Sales Playbook. To help you understand where the team is in terms of being ready for change, you may want to conduct a brief survey. Simple questions such as "*What issues have come up during past change initiatives?" "Do we measure change initiatives?" "Do we celebrate successes?"* provide valuable insight into how to best communicate changes so you obtain maximum team buy-in.

At the end of the day, you want your sales force to see the playbook as a tool that helps them sell more product, and not as just another process imposed on them by management.

Implement Change Management

"If you are going to invest in training your salespeople, then the follow-up processes need to be in place for their managers to ensure that the training is being applied consistently and effectively by the reps in their daily workflow, so that it becomes ingrained into how they sell. Failing to do so will minimize the ROI your company sees from your training investments."

- CSO Insights 2009 Sales Optimization Report

Since implementing a Sales Playbook requires a significant investment, don't forget how important it is to have strong executive leadership and support. Unless sales managers and team members see the new process as a permanent, long-term change, they will not support it.

Additionally, keep in mind the danger of silos within your organization. To mitigate this risk, involve all departments and personnel impacted by sales up front. The payoff is big. Salespeople close deals faster because they can work more efficiently with internal support personnel (legal, accounting, etc.).

Develop and Conduct Training

It is crucial to offer proper training and to give salespeople a way to get their hands on resources exactly when they need them. At this point, you have chosen the 20 or fewer best team plays and practices that are foundational to changing behavior and driving people to start using the Sales Playbook. Now, you must create a plan to train the entire team on these activities and to help them understand how to use the tools. As the coach, you have some options.

Option 1: Build Your Curriculum

Often, you will need to partner with internal or external learning development professionals to support these best practices with a curriculum that changes behavior. This may include developing materials, workshops and exercises to practice using new skills.

Option 2: Buy Your Curriculum

If you have chosen to partner with a sales methodology vendor, you will likely be able to leverage existing materials to train both your managers and sellers. Also consider working with a vendor that creates learning maps for this step (companies such as BTS and Real Learning). Picture a day-long event where your sales team plays a competitive board game that simulates the steps in the Playbook and allows them to explore the new tools and processes (Figure 10).

Figure 10. Board Game Simulation
Developing a competitive board game that simulates Sales Playbook activities is an effective way to train the sales force on your new processes and tools.

To encourage all of the players to become comfortable using the new playbook, spend time walking them through specific examples and scenarios. Team members need to see how applying the new sales process will make their daily lives easier and result in high scores, better personal stats and more wins.

Reinforcement

"Perfection is not attainable, but if we chase perfection we can catch excellence."

- Vince Lombardi

Even after winning a game, a good coach keeps training and motivating the team so they make it to the playoffs and ultimately win the championship game. Strong leaders update their playbook strategies seasonally and modify them regularly. Follow this example! Outline an overall strategy for how you will use feedback, analytics and experience to tweak your collection of winning plays on an ongoing basis. Best practices for evolving your Sales Playbook include:

- Establishing a feedback loop
- Leveraging analytics
- Developing a review schedule
- Establish a Feedback Loop

If you want to obtain useful feedback about competition, products and customers, you must establish a clear communication path for your players. You will probably find that leveraging social networking tools can be very helpful. For example, consider setting up forums and discussion boards to communicate with end users, content owners and managers.

Leverage Analytics

Understanding what is and is not being used at key points in the buying process allows you to keep your sales team focused on the activities that work and eliminate those that do not. Leveraging measurable data to drive your Sales Playbook results in improved decision making and increases sales performance overall. Teams that focus on analytics have the tools they need to get stronger and win more. Be a team that applies analytics. Keep an eye on talent management, operations and processes. Adjust your game strategy appropriately.

Develop a Review Schedule

Keep Your Playbook Fresh

A stale playbook is the equivalent of running a play that never seems to work—no matter how much practice the team gets.

To keep your Sales Playbook up-to-date, decide how often material and feedback will be evaluated. Also, make sure you clearly define which "assistant coach" on your team is responsible for the review process.

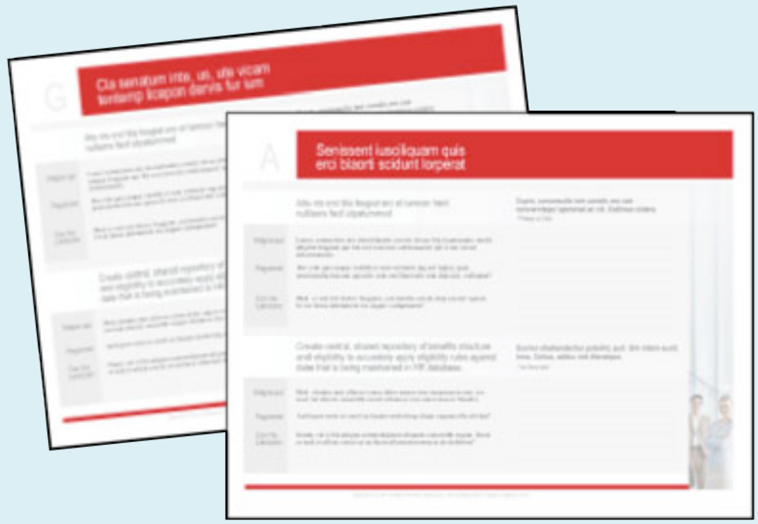
Enlist the help of team members to keep an eye on the ball and to constantly analyze performance. A stale playbook is the equivalent of re-running a play that never seems to work—no matter how much practice the team gets. Identify and examine best practices that get results to help keep your players in shape to catch the next pass thrown their way —and to run it in for a touchdown!

Deliverables

After all this hard work, what do you end up with? In short, a lot! Your team now has access to a written Sales Playbook, as well as a robust toolkit of relevant support materials (demonstrated in Table 6, next page). Additionally, you have developed and implemented a rollout plan and have a process in place to continually evolve your playbook. Go team!

Table 6. Sales Playbook and Support Tools	
Tools/Purpose	Sample(s)
Sales Playbook provides a fully-documented sales process that outlines top performers' best practices.	 
Coaching Tools help sales reps effectively target vertical and horizontal business, resulting in higher closure rates.	
e-Brochures attract client interest early in the sales cycle.	
Client Questionnaires ensure a focus on a consultative approach.	

Analysis Grids allow sales reps to transfer information gathered into a high-value solution.



Sales Presentations and **E-mail Templates** ensure sales reps send a consistent message to all clients.

7.4 Outcomes

All your hard work is finally paying off—a comprehensive, well-implemented Sales Playbook will result in consistent performance across your sales organization. Your players are sharpening their skills, learning from the last game, preparing for the next and winning more deals. Figure 11 summarizes the benefits for the entire team.

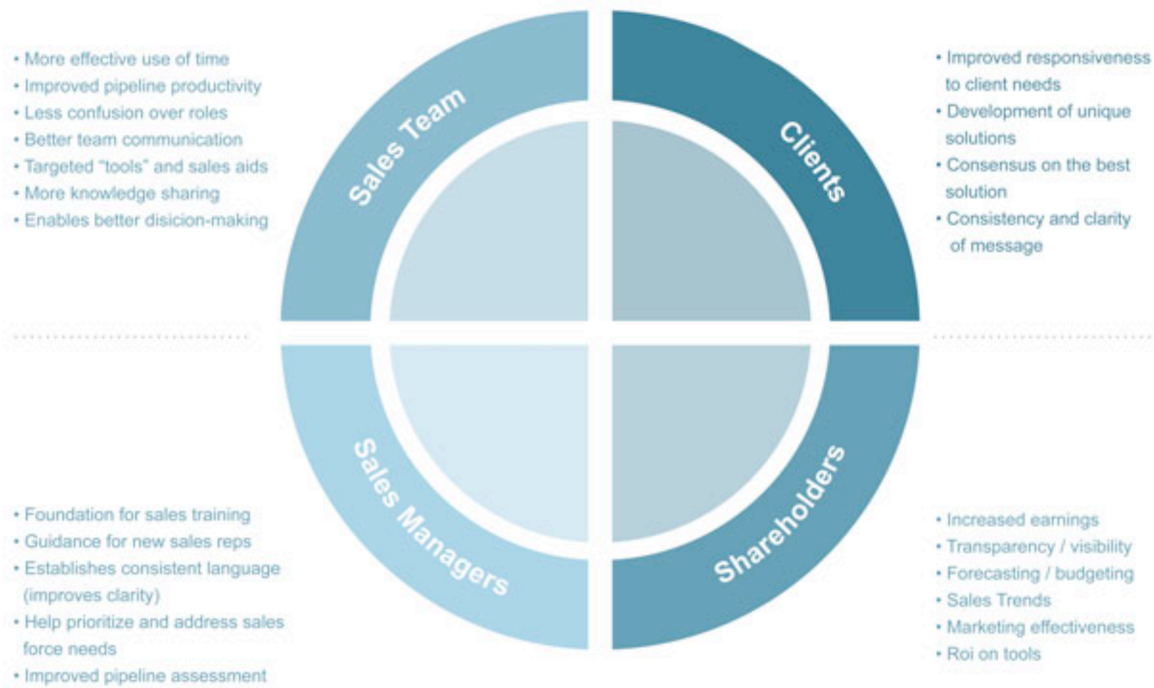


Figure 11. Long-term Benefits
Better decision making, more knowledge sharing and consistent sales performance are just a few of the many advantages a Sales Playbook offers.