



How To Guide Series

Designing Sales Playbooks that help salespeople win deals

BPMWorks™

Why are Sales Playbooks so relevant now?

1 Learning behaviours change

- The preference for most of us now – and definitely most people in sales – is to consume bite sized pieces of information when we need it!
- Think YouTube

2 Customers expect more from their conversations with salespeople

- By the time a buyer is finally ready to talk to a salesperson, he or she has done loads of research using the Web
- Buyers want to learn something useful from the salesperson about their situation, options for addressing the challenges they face, how other companies like theirs have adopted new approaches or technology, etc.
- Salespeople need deeper knowledge of customers and how to solve their problems

Different types of playbooks and their purpose

3 Two main types of sales playbook

- Playbooks that set out and teach a company's sales process – Selling Methodology Playbooks
- Playbooks that provide the knowledge to sell a particular product or proposition – Selling Knowledge Playbooks

4 Selling knowledge playbooks (the focus of this Guide)

- The purpose is to provide information on what a salesperson should know about the typical customer, their challenges, questions to ask, how to position your company and products, etc.

How to structure a Sales Playbook

5 Well-constructed sales playbooks give salespeople access to relevant learning, on-demand

- Design playbooks to equip salespeople with the critical chunks of knowledge they need to successfully interact with customers at the key communication points in the sale
- This makes it easy for them to access just-in-time learning for their next email, call or meeting

6 Build in the sales process and market segmentation

- The different types of things you need to know to sell effectively depend, of course, on the sales situation and where you are in the sales process
- Structure the presentation of information in the playbook around the sales process to facilitate quick access
- Also build target industries, use cases and personas into the organisation of information to help people grab the most relevant insights and ideas for the sales situation they face
- Use color coding and links to facilitate navigation



Playbook Content

7 Size matters – don't make it too comprehensive!

- Resist the temptation to cover everything you think a salesperson could ever need or want to know – focus on the essential insights, ideas and guidance
- For playbooks delivered as PDFs, covering every market you target and every product you offer may result in a huge document – this will be a big turn-off for salespeople
- Consider producing separate PDFs for separate solution sets and markets

8 Focus on the essentials for each sales stage

- **Prospecting**
 - Context and drivers for the customer’s markets
 - Characteristics of organizations that make them good prospects
 - Target personas, what they do, and what may ‘keep them awake at night’
 - Where to look for goals, strategy and developments for the account
- **Qualification**
 - Conversation openers
 - Questions for initial probe
 - Early positioning pitch (elevator)
 - Examples of how we’ve helped similar customers and the results they got
- **Discovery**
 - Top business challenges and opportunities we can help customers address
 - Ideas for needs discovery questions
 - Examples of how to articulate ‘what life could be like’ with a solution from us
- **Solution Development**
 - How our solutions address common customer challenges and typical value delivered
 - Pillars of our proposition (what defines and positions us in the market)
- **Proposal**
 - Top points of differentiation for our products and our company
 - Corporate credentials
 - Competitive strengths side-by-side

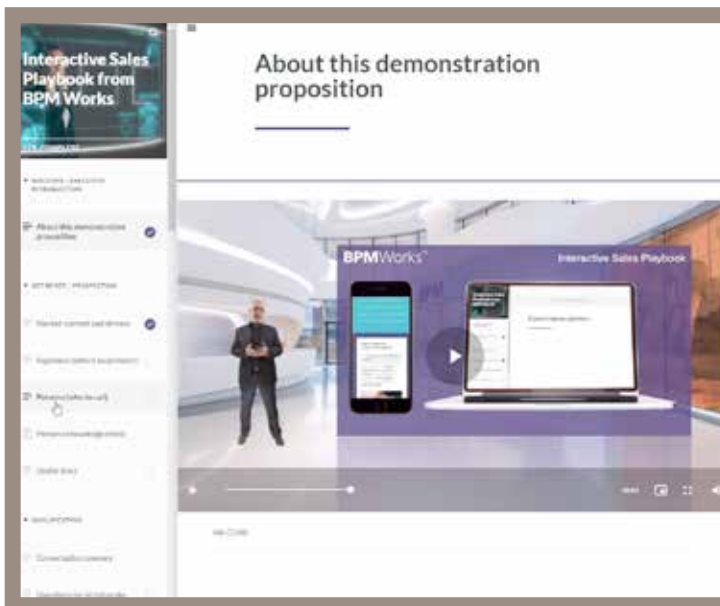
Digitizing Sales Playbooks

9 Information overload limits the effectiveness of document-based playbooks

- If your company or sales team sells a single solution into one industry segment with two or three main buyers, then you could fit the essential information into one PDF of perhaps 2-4 pages
- Reps who sell into more than one segment, to multiple personas and have several products and services to offer, are going to need access to a whole load of knowledge to sell effectively!
- In this case document based playbooks may not be the right way to go

10 Interactive digital options

- One option is to use a learning creation package like Articulate Rise to build interactive playbooks in HTML5 that include videos, knowledge checks and navigable learning content
- Playbooks built using Rise have the advantage of being responsive so they can be used on a phone, iPad or laptop, and they can be deployed using an enterprise learning management system
- There are also configurable add-ins available for sales enablement platforms like Bigtincan, that can deliver this type of selling knowledge via an interactive Guided Selling experience.



Example of an Interactive Sales Playbook built using Articulate Rise

Traditionally, sales playbooks have been delivered as PDF documents, but the arrival of HTML5 has spawned a new generation of ‘digital sales playbook’. These deliver a far more engaging experience including interactivity, video, knowledge checks, and ‘just-in-time’ access to information before meetings and calls.



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About BPM Works

BPM provides a methodology, expert services and specialist toolset for capturing customer insights and developing go-to-market messaging for B2B propositions.

Our Workbench software enables us to gather output from the right people across the organization, quickly and efficiently using virtual workshops.

We also create interactive sales playbooks, microlearning and other tools for sales enablement.
