



How To Guide

# Sales Playbook Activation

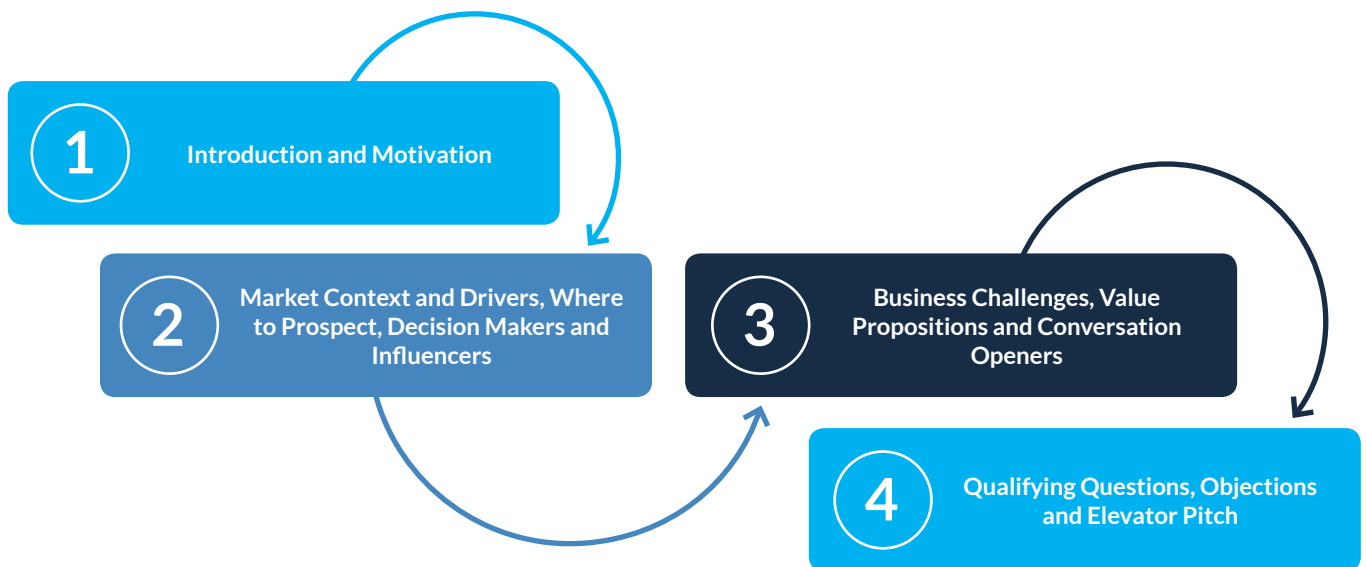
How do you build a learning program to get people using a new sales playbook?

## Playbook roll-out

You can't simply load a sales playbook for a new product or proposition onto the company sales portal and expect people to download and start using it.

To drive rapid adoption, you will need to roll-out some sort of learning intervention.

**In an age of virtual learning, what does a Sales Playbook Activation program look like?**



### Key areas of proposition learning

At a high level, a learning intervention that is designed to equip sales people to start selling a new product or proposition, should address the 4 key areas identified above.

Your sales playbook should already be constructed to deliver insights and guidance around these topic areas. The primary objective of your learning program will be to get sales people to understand, internalize and then practice using this information in communications and conversations with prospects.

### The importance of 'doing'

For action oriented individuals like sales people, 'doing' is the best way to get learning to stick. This is especially true for any program designed to equip people to sell a new B2B product or proposition using a consultative sales approach.

Reading about the challenges a product solves for customers and how a solution delivers value is one thing, but having the confidence to engage with prospects in early conversations is an entirely different matter!

So hands-on, workshop style sessions and practice exercises are critical to getting sales people selling a new proposition quickly.

### Classroom vs video conference

If there's one thing we've learned from Covid-19 it's that we can do far more using video calls than we thought possible before! While it's hard to beat the effectiveness of in-person classroom training, well-constructed programs can be delivered effectively via video collaboration platforms like Zoom and Microsoft Teams.

For hands-on exercises in groups, you will need to make use of 'breakout rooms' and have enough facilitators on hand to drop into the different rooms at regular intervals, to make sure attendees understand what they are being asked to do and activities are being executed as designed.

Ideally, your Sales Playbook Activation program will be constructed so it can be delivered both face to face and via video platform.

## Example learning program

Exactly how you construct your program will depend on a number of factors, including the knowledge and capabilities of the sales teams targeted and the complexity of the proposition concerned. Ideas for the sessions you might want to consider and the activities people will undertake, are given below.

	Session	Classroom*	Video Conference*
Part One	<b>Introduction and Motivation</b> Introduction, delivered by <i>host leader</i> Why are we here? <ul style="list-style-type: none"> <li>Set out the objectives for the program</li> </ul>	10.00 am	<b>Call One</b> 60 minutes
	Program overview, delivered by <i>course leader</i> How will the program run? <ul style="list-style-type: none"> <li>Show the structure of the program with dates and times and homework requirements</li> <li>Show and explain the Playbook</li> <li>Briefly explain that there will be pre-work which includes reading the Playbook</li> <li>Provide the links to pre-work, templates to use and timings for submissions</li> </ul>		
	Ask the group what their challenges are today in selling this proposition.		
	Provide a brief introduction to the market context and drivers.		
	Describe the target market for this proposition and explain pre-work which requires identification / research of prospects or customers, and revenue.		
	Questions?		
	<b>Market Context and Drivers, Where to Prospect, Decision Makers and Influencers</b> Introductions facilitated by <i>course leader</i> One sentence (one breath) personal introduction plus their performance target for the program (or biggest challenge), chosen prospect(s) and revenue objective.	11.00 am	<b>Call Two</b> 120 minutes
	Set-up any required technology / links such as Jamboard or Whiteboards. Explain how it works.		
	Present and discuss the 'Market Context and Drivers (Get Ready)' from the Playbook. Ask the group to add examples of evidence they have of these drivers and any additional scenarios they would suggest. Run a poll to establish the most likely / common scenarios among the group. 'Who are these scenarios most likely to impact and why?' Exercise: Outline the Ideal Customer Profile with the whole group within the target segments (or departments) <b>and refine</b> . Rank segments / departments by attractiveness for this group. Have each individual reflect on their pre-selected segments / departments and revise / amend if necessary. Individually, identify named likely early adopters / initial targets.		
	Break		

	Session	Classroom*	Video Conference*
Part One	Position the proposition within target organisations. Identify the target departments and specific job roles.		
	Review the Opportunities and Challenges for customers from the Playbook. Are there any additional opportunities or challenges? What can make these opportunities / challenges more impactful to prospects?		
	Explain the importance of buying groups and multiple stakeholders. Who else is involved? Exercise (in breakout groups): Build an understanding of the typical customer stakeholders at each stage of the buying cycle. Label / rank them by importance (use sales methodology labels if available). Review session and explain <b>Work on Accounts</b> exercise.		
	Break	1.00 pm	
	<b>Work on Accounts:</b> Identify the real KPIs and goals for customer stakeholders.	1.30 pm	Offline work
	<b>Business Challenges, Value Propositions and Conversation Openers</b> Review of last session on Market Context and Drivers, Where to Prospect, Decision Makers & Influencers.	2.00 pm	<b>Call Three</b> 120 minutes
	Capture, discuss and validate real KPI's and goals prepared by attendees as homework after last workshop.		
	Discuss buying triggers. Discuss likelihood to change and triggers for example decision maker / stakeholder. Discuss likely buying triggers for individuals and departments. How will you activate the trigger?		
	Review value propositions and connect a relevant example value proposition from the Playbook, to challenges, KPI's and goals that attendees have identified for their customers.		
	Exercise: Connect relevant value proposition to challenges, KPI's and goals of specific target accounts and personas and write a statement.		
	Break		
	Discuss what value means to individual customers and provide an illustration of unique value (use Value CUBE or customers' own approach).		
	Exercise: Run unique value test and report back.		
	Discuss the importance and structure of conversation openers.		
	Review session and explain <b>Customer Conversations</b> exercise.		
End	4.00 pm		

	Session	Classroom*	Video Conference*
Part Two	<b>Customer Conversations:</b> Test conversation openers through calls with selected opportunities.	Homework	Offline work
	<b>Qualifying Questions, Objections and Elevator Pitch</b> Review success with conversation openers.	11.00 am	<b>Call Four</b> 120 minutes
	Introduce a framework for qualifying questions (align with existing methodology where the client has adopted one already).		
	Exercise: Develop qualifying questions to use with target accounts.		
	Role play with buyer in teams of 3. Objective: Practice qualifying questions, understand buyer perspectives. NOTE: there are 2 further role plays post session.		
	Break		
	<b>Objection Handling:</b> Flip common objections to engaging and rank them.		
	Group discussion on objections and what's often behind the top 3 objections to engaging in a conversation.		
	Exercise in teams. Develop clarifying questions (align language with company approach).		
	Explain what an elevator pitch is - emphasise the need to customise and make relevant.		
	Exercise: in teams, write pitches and pick the best one; review each best pitch.		
	Review session and explain <b>Role Plays</b> and <b>Customer Conversations</b> exercises.		
	Break	1.00 pm	
	<b>Role Plays:</b> Run 2 more role plays facilitated by client sales managers.	2.00 pm	<b>Calls with Managers</b>
End	4.00 pm		
<b>Customer Conversations:</b> Use elevator pitches with selected opportunities.	Homework	Offline work	

\*Classroom and video conference sessions facilitated by expert trainers with knowledge of the product or proposition concerned and target markets

## Typical learning objectives

Here are some of the most common learning objectives for an intervention designed to launch a sales playbook for a new product or proposition:

- Market context and drivers are understood
- Participants know which companies and customer stakeholders they should target
- Ideal customer profile is understood
- Participants learn the typical customer business challenges, the capabilities the company has to address each, and how this delivers value
- Participants recognise how these value propositions can connect to stakeholder KPIs and goals
- Participants learn an approach to devising and using effective conversation openers and qualifying questions
- Common objections from customers are recognized
- Process for managing objections is understood and internalized
- Intent and structure of an elevator pitch is understood

## Performance objectives

Depending on the organization's needs, the targeted performance change could include:

- Each participant has established an ideal customer profile for their territory or accounts
- Participants can identify the typical customer stakeholders
- Participants can qualify their chosen opportunities against the ideal customer profile
- Each participant is able to articulate their customer's business challenges and opportunities

- The group can link value propositions to the KPI's and goals of target stakeholders
- Participants are able to develop and ask effective qualifying questions
- They can apply this process and knowledge when dealing with objections
- They can develop and use an elevator pitch



## BPMWORKS

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

We also create interactive sales playbooks, learning content and activation programs for sales enablement.

Customers include ICE Data Services, LexisNexis, Reed Business Information, LSEG Refinitiv, Intertrust, Lumen and Zellis.

### North America

**Paul Geraghty**  
 pgeraghty@bpmworks.com  
 +1 514 497 4336

### Europe

**Phil Chew**  
 pchew@bpmworks.com  
 + 44 7990 567 507

[www.bpmworks.com](http://www.bpmworks.com)