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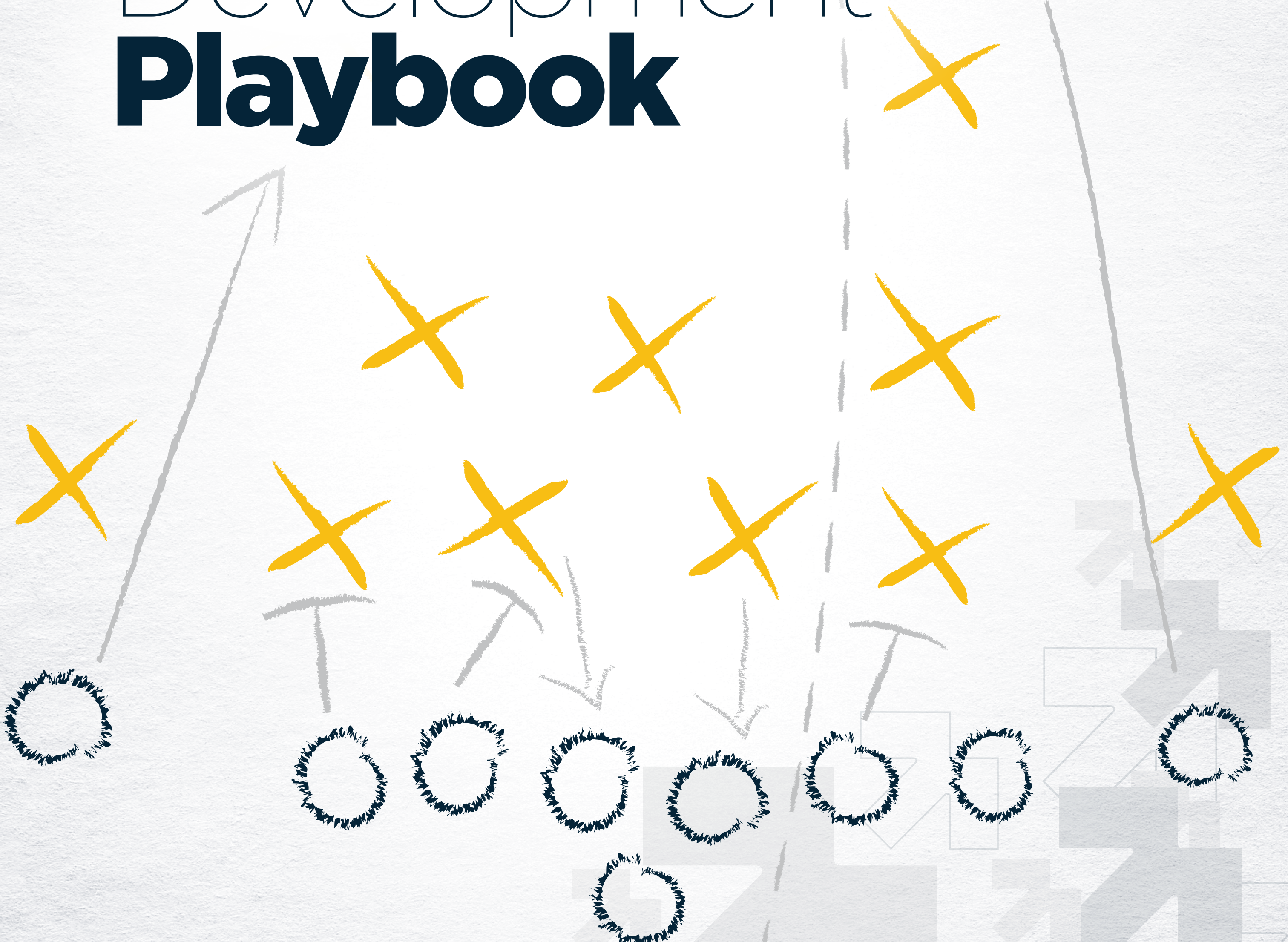
WORKBOOK:

How to Create Your Sales Development **Playbook**



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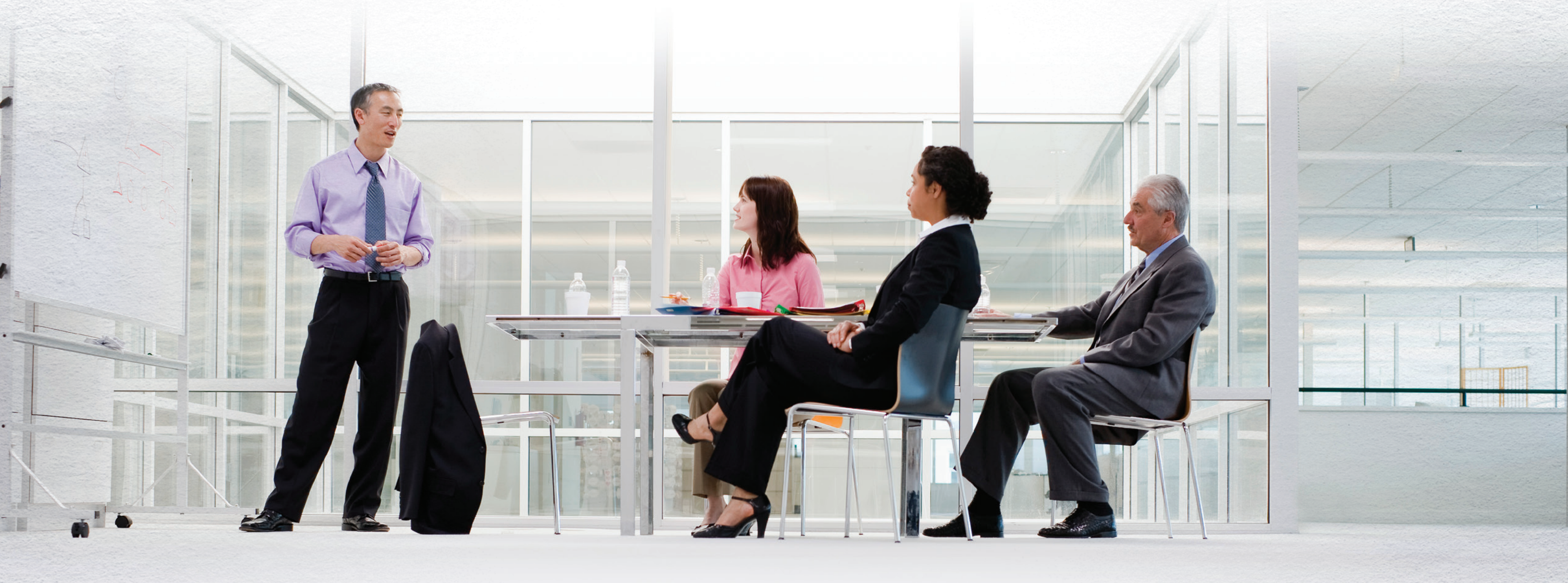
The sales development role is currently one of the fastest growing, highest ROI sales strategies being utilized by high-growth organizations. While the opportunity is large, for the sales development process to be successful you must have excellent processes in place to support it.

Research has proven that organizations with a well-defined sales developement process perform at higher levels than those without this type of structure. One of the most valuable resources in creating such a structure is the sales development playbook.



Quite simply, the sales development playbook is an integral part of a high-performing sales development process. Getting new sales developement reps up to speed without a playbook is time-consuming, trying and produces inconsistent results.

The sales development playbook is not for new hires alone. By utilizing a playbook to document all of your best practices, and updating it accordingly, you create consistency throughout your organization and enhance results.

Every sales development playbook is unique to the organization. The purpose of this workbook is to help you design your playbook (or enhance the one you have in place). You'll see that this workbook is broken into the key sections every playbook should have and provides the actions you should take to create yours. In many cases we provide examples as well.

About The Company & Product

Product Focus: Features & Benefits

Create a table like the one below that highlights the most important features and benefits of your various products or services. It's important to keep your list focused. We recommend listing no more than three features.

Product 1:

Product/Service Feature	What this means for the customer (benefit)
Feature 1	Benefit 1
Feature 2	Benefit 2
Feature 3	Benefit 3

Product 2:

Product/Service Feature	What this means for the customer (benefit)
Feature 1	Benefit 1
Feature 2	Benefit 2
Feature 3	Benefit 3

Product 3:

Product/Service Feature	What this means for the customer (benefit)
Feature 1	Benefit 1
Feature 2	Benefit 2
Feature 3	Benefit 3

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Our Message

One of the most important criteria to building predictable results into your lead generation and sales systems is to create an effective market message that is shared and consistently delivered by everyone on your team. Training your reps on message is the equivalent of teaching the “commander’s intent.” With clarity, reps are able to adjust to unexpected situations and still communicate effectively and confidently.

The Message Grid:

The Problems We Solve:

Why We’re The Best Choice:

Our Elevator Speech:

Our Market Message/Brand Promise:

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Effective Sound bites

Sound bites are those phrases, sentences and many scripts that you have found to work most effectively for specific situations. List the effective sound bites you use to describe who you are, what you do and why it matters:

Sound bite 1:

Sound bite 2:

Sound bite 3:

Sound bite 4:

Competitive Analysis

Competitor	Their Strengths vs. Us	Our Strengths vs. Them

About You

Metrics & Goals

Data is a crucial component of any sales effort, but especially for one involving sales development efforts. It's far too easy to fall into the trap of managing by feel. Often what you think is working, isn't; and what you think isn't, is. Don't let opinions rule the day when you should have the data to give you the answer.

Additionally, as the old saying goes, what gets measured gets done and gets improved. Tracking activity and results is crucial to effectively coaching and assessing the performance of your sales development team.

While you should develop your own key performance indicators, we recommend tracking at least these metrics on a daily, weekly and monthly basis:

- **Dials** – number of outbound attempts/dials made.
- **Contacts** – number of times a person is talked to, whether they are the right contact or not.
- **Messages** – number of messages left.
- **Conversations** – the number of times the right person was connected with.
- **Eliminations** – the number of leads that were eliminated. You should also have a tracking mechanism for the reason.
- **Leads Passed On/Appointments Set** – the number of times the call ended in a successful conclusion.

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Daily/Weekly Schedule

Successful performers have clear routines. Many sales development people are not naturally organized and oftentimes fight routines. Any number of productivity studies demonstrate that the failure to stick to a routine (especially in an effort as volume based as sales development) has a significant drag on performance.

You should create a standard daily or weekly routine that all sales development reps should strive to stick to. Here is an example:

Daily Schedule:

8 – 9am	Answer emails, check calendar, send confirmation emails, prepare for day.
9 – 11am	• Work "Hot Prospects" list • Follow up calls and emails • Follow up on marketing leads
11 – 1pm	• Research • Look up potential prospect info • Other follow up emails • Lunch
1 – 4pm	• Internal/External meetings • Hot prospects list • Marketing leads
4 – 6pm	• Follow Up calls • Send new prospecting emails • Prepare for next day

If your business has a rhythm that is different on a day-to-day basis feel free to outline by day, but be sure to outline the routine your expect.

About The Customer

Buyer Personas

Developing buyer personas are a unique effort, requiring that you create a clear target of your ideal customer profile. The more your sales development reps know about who they should be pursuing, and what makes them tick, the more successful they will be.

Buyer personas can be very different depending if you're a B2B organization or a B2C one. Here are some key criteria you should have in yours:

Company Information

- Types of industries
- Size range
- Growth Profile
- Competitive Environment
- Common Challenges

Contact Information

- Roles/Titles*
- Demographic info
- Psychographic info
- Mindset/Identifiers
- Responsibilities
- Goals
- Challenges
- Experience with your product/service

How you can impact them

About The Process

Rhythm

Every effective outbound sales initiative should maintain a rhythm. Integrating emails with phone calls (and other touches) can double the results of your campaigns. The playbook is the place to lay that process out clearly. Here's an example of one of our rhythms:

Day 1 Call Attempt 1

- If connected… proceed to capture the data and qualifying the call
- If no connection
  - Leave voice message (This is ___________ with Safe Soft Solutions. I am calling to follow up on your recent inquiry. Please give me a call back. My direct line is --- --- ----
  - Send Email Template in CRM titled "Contact Attempt 1"

Call Attempt 2,

- If connected, proceed to capture the data and qualify the call
- If no connection, DO NOT leave another Voicemail.

Day 2 Call Attempt 3 follow the same strategy as the call attempt 1, but don't send another email.

Day 3 If no response from the prospect by the third day, send second email titled "Contact Attempt II."

Day 4 Call Attempt 4, follow the same strategy as "Call Attempt I", but don't leave any messages on either attempt.

Day 5 Nothing

Day 6 If no response from the prospect by the 6th day, send third email titled "Contact Attempt III."

Day 7 Nothing

Day 8 Call Attempt 5, follow the same strategy as "Call Attempt 1."

Day 9 Nothing

Day 10 If no response from the prospect by the 10th day, send fourth email titled "Final Attempt." Status the lead out in CRM as "Can't Contact."

Lead Classifications

All leads are not the same and should not be treated the same. Understanding the quality of a lead and key insights to the lead are especially important when you have a sales process that involves sales development/appointment setters and field sales/closers. If your sales team manages the lead from the beginning to the end, this section is not as important.

Here again, lead classifications and criteria are unique to each organization based upon what they're selling, who they're selling to and other criteria related to your sales process.

As a basis we recommend laying out a process for classifying and tracking:

Lead Quality

- High
- Medium
- Low

Lead Status

- Open
- Working
- Delayed
- Nonqual
- In Sales Process
- SQL Forwarded

Business Type

- Product Focus
- New Business
- Repeat Business

Key Issues

Handovers

If you utilize the sales develpment to closer outbound model it is important to layout how handoffs should be managed. This should include:

- Scripts to use when talking with the prospect
- Workflows to follow
- Instructions for how to enter in CRM or other tracking tool
- Who to notify and how
- How to log for credit/compensation

Email Templates & Voice Mail Scripts

You should provide email templates and voice mail scripts for each email used in your rhythm as well any other common emails or voice mails.

Qualification Questions

Provide the list of questions your sales development reps need answered to qualify the prospect.

FAQs

Provide a list of commonly asked questions and sound bites your ISRs can use in answering those questions. Use a grid like the one shared in the section on messaging.

Common Objections

Just as with FAQs, list the common objections ISRs will hear and sound bites for addressing them.

About Operations

Depending upon the complexity of your organization you may want to create a separate operations manual that outlines the technical aspects of your SDRs role. If your operation doesn't require a separate manual, be sure to address the following in your playbook:

Scheduling next steps (demo's, appointments)

If you're using an appointment setter – closer model it's crucial that you lay out the step-by-step instructions for how next steps should be scheduled. You should include screen shots of the systems your SDR will use and how fields should be filled in.

Inputting into CRM

If you expect SDRs to do original lead sourcing or prospecting be sure to provide step-by-step instructions (with screenshots) for how new leads should be added to your CRM or other tracking system.

How Leads Get Assigned & Who Gets Credit

The biggest area of distress and disruption with sales development teams inevitably comes down to how leads get assigned and who gets credit for it. This is especially true in growing departments. As with most other parts of your playbook, your protocols for this area are unique to you. Here are some base scenarios to make sure you address:

- How are leads assigned initially?
- What actions must be taken and within what time frames to retain "ownership" of leads?
- How long does a lead stay assigned?
- What happens when a lead ownership expires?
- What happens if a lead reenters the process?

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Let's Talk About Your Demand Generation Process

Studies show that when sales and marketing efforts are highly aligned, organization achieve an average of 32% revenue growth; and a decrease of 7% when they're not (source: Aberdeen Group). But what does that mean? How can you tell if your efforts are aligned, and, more importantly, how do you develop the roadmap to ensure they are aligned today...and in the future?

If your sales and marketing efforts aren't producing predictable, sustainable and scalable sales growth then we need to talk. Our free sales and marketing assessment will provide you:

- **An analysis of your current marketing, lead management and sales situation to identify areas in need of improvement**
- **An in-depth look to figure out which lead generation tactics will work best for you**
- **An analysis of your sales structure to identify the best way to maximize growth opportunities**
- **An analysis of your website**
- **A written report providing the roadmap to make your growth predictable, sustainable and scalable**

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