How to build an effective B2B sales playbook

What they are, why they matter, and how to create them

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Introduction

More than anything, your salespeople want to close deals. After all, that's what they're incentivized to do. But if they have to reinvent the wheel each time they engage with a new prospect, they won't have enough time to focus on building relationships and making sales.

How can you make it easier for them to meet their goals? By equipping them with a sales playbook. Although not a substitute for comprehensive training, a great sales playbook is a valuable resource for salespeople and B2B marketing professionals that will help to:

- Improve productivity across your sales team
- Standardize best practices
- Reduce ramp-up time
- Make salespeople more autonomous
- Enable easy access to approved tools and content
- Significantly reduce the risk of salespeople providing a poor experience for buyers

One study* found that the best-performing companies are nearly twice as likely to have sales playbooks than 'laggards.'

Read on to find out more about the benefits of a sales playbook, and how to go about creating one.

*https://blog.hubspot.com/sales/sales-playbook

Playbook benefits

Playbook benefits

As many as 55% of sales people don't have the skills they need to be successful[1]. But with increasing competition, you can't afford an underperforming sales team. One of the best ways to them up to full productivity as quickly as possible is to make sure they follow a well defined sales process. So it's rather surprising to learn that 60% of B2B companies don't have a defined sales process[2], given that companies that do have one grow revenue 18% faster than the rest[3].

This is where a sales playbook comes in. Creating a sales playbook obliges you to document your sales process, and establish a structure through which you can provide salespeople with the information and resources they need to be effective. Among the things they need to know are the following:

- How many calls they're supposed to make
- How fast they're supposed to respond to new inbound leads
- How your company uses CRM
- What's considered best practice at your company
- What proven messages they can use to overcome objections or beat specific competitors
- What content can help deals move forward at various stages

It's surprising that 60% of B2B companies don't have a defined sales process, given that companies that do have one grow revenue 18% faster than the rest.

Creating a sales playbook can take time, but it will start delivering results almost immediately:

Training new salespeople is quicker and easier when you have clear descriptions of who your customers are, how they buy your products, what their pain points are, and what to say to them. Otherwise, your salespeople have to learn this information on the hoof — usually by shadowing other members of the sales team, who may not even be following best practice.

Sales have more time for selling. Without a sales playbook, salespeople spend about a third of their day creating content — which may not be on brand or on message. Even if the content they need exists, they often don't know where to find it or how to package it — which is why an estimated 60-70% of

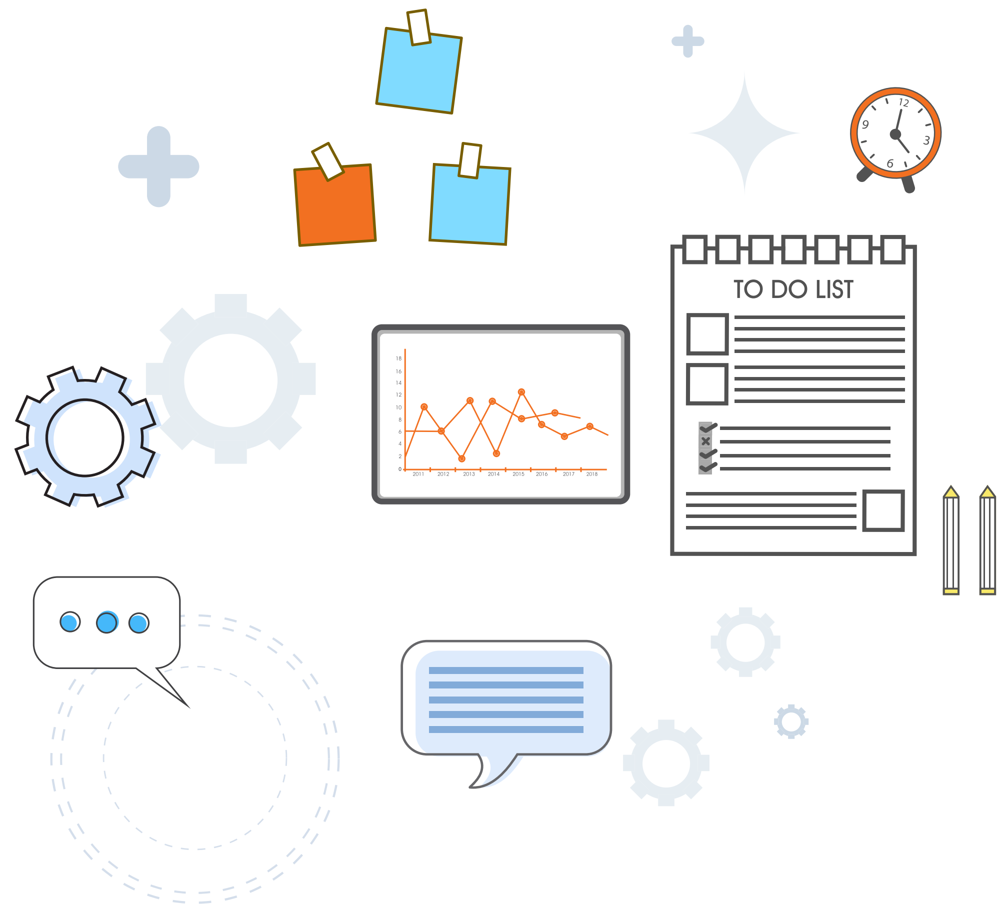
1. Herbert Greenberg: How to Hire and Develop Your Next Top Performer: The Five Qualities That Make Salespeople Great 2. Hubspot https://blog.hubspot.com/sales/sales-process-cheat-sheet-template 3. HBR 2015 https://hbr.org/2015/01/companies-with-a-formal-sales-process-generate-more-revenue

marketing-created content goes unused by sales teams. Instead of leaving your salespeople to develop their own resources to use with prospects, give them ready-made, pre-approved content that's easy to find and use, so that they can focus on selling.

The whole sales team learns the most effective techniques. If, for example, you notice one rep having success with a specific outreach method, you can share it with the rest of the team by putting it in the playbook.

What's more, creating and revising a sales playbook will engage marketing and sales in a review of assumptions and will drive discussions about where the best opportunities lie, what barriers there may be to success, and how they will jointly marshal resources and messages to tackle both. Through this process, you can gain insights that will help sales to uncover qualified sales leads and crack tough accounts. And as your marketplace changes over time, you can review and refine your playbook accordingly.

Although it's sales and marketing who will feel the immediate benefits of an effective playbook, the whole business will benefit ultimately, as faster sales cycles and easier achievement of sales quotas lead to higher company revenues.



How to create a sales playbook

How to create a sales playbook

When you set out to create a sales playbook, you need to ensure you:

- ✓ Involve the right people
- ✓ Set clear goals
- ✓ Understand what existing content and resources can be reused, and where the gaps are

Step 1. Bring your team together

Work out who needs to contribute to the playbook creation process. As a general rule, you'll want to involve:

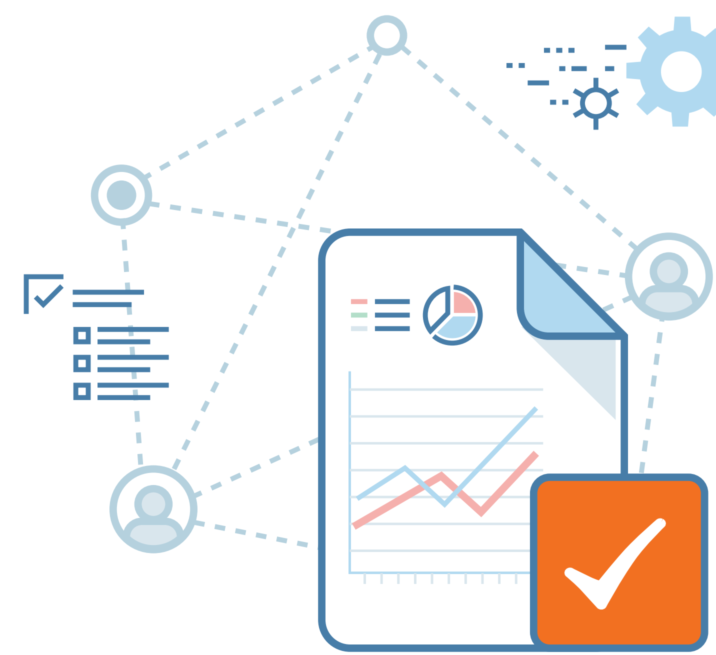
- ✓ Representatives from your sales team — ideally, the VP or director, and some of your top-performing salespeople
- ✓ Members of the product marketing team who are familiar with your buyer personas, product messaging, market position and so on
- ✓ Subject-matter experts, whose insights will help to create compelling sales collateral
- ✓ Representatives from your sales enablement, sales operations, and marketing operations teams (if you have them)

It's useful to appoint a project manager to take responsibility for the timeline, as well as for content submissions and approvals.

Step 2. Outline your goals

Are you creating a new sales playbook, or expanding or updating an existing one?

If you're starting from scratch, you might find it less overwhelming to tackle one part of the sales process first. So if there's a step in the sales process



that salespeople find especially challenging, you can prioritize it. For instance, if identifying qualified buyers is a real stumbling block, you could start by producing a playbook on this topic that includes qualifying questions and typical characteristics of suitable prospects.

Step 3. Audit your existing resources

Most organizations already have content and tools that can usefully be included in a sales playbook, even if they're scattered across servers and storage areas. Your salespeople will doubtless have developed their own email templates, calls scripts, presentation decks and other resources, which you should ask them to bring to the table. There are two main reasons not to let them go to waste:

Updating and refining them may take less effort than creating new content

Salespeople are more likely to adopt content adapted from familiar resources

Categorize all the existing content and tools by sales process stage. That way, you'll be able to see where the gaps are, and where you need to focus new content creation efforts for your sales playbook.

Typical sales playbook sections

Every company will work out the sales playbook structure that works best for them. Typical sections for inclusion are outlined below.

Buyer personas

Don't assume your salespeople know who your buyers are — you need to clearly express who you're selling to, what they care about or are struggling with, and how your company can help them.

Start by mapping out your buyer personas and understanding how each of them moves through the stages of the buyer journey. There will be differences between users, influencers and decision-makers, which your content will need to address.

Mapping buyer personas will help your salespeople identify the most qualified leads. You'll want to include information such as:

- ✓ Typical job titles and reporting lines
- ✓ Common challenges and pain points that your company's products or services can help them resolve; and aspirations you can help them realize
- ✓ How much power they have
- ✓ At what point in the buying process they get involved — for example, a CTO will probably wait until it's time to make the final choice between two vendors

Product and service guides

This section should cover all the products or services your salespeople are responsible for selling, along with information such as price points, use cases, core value offerings, and related industries or verticals.

If there are significant differences between your products and services — such as different target markets, sales processes or sales teams — you may need to create a sales playbook for each one, for the sake of clarity.

Battlecards (including competitor analysis)

B2B buyers often struggle to see clear differences when comparing similar products — in fact, only 14% of them manage to do so[1]. An effective battlecard should equip your sales team with responses to key questions a prospect might ask, that will persuade them to choose your company's product or service.

To produce a useful battlecard, you need a solid grasp of your own market positioning, so that you can:

- ✓ Summarize the key differences between your product and your competitors' products
- ✓ Outline the business problem(s) your product solves
- ✓ Explain the benefits of selecting or switching to your product
- ✓ Clearly express the key differentiators that salespeople need to convey to prospects

Your sales process

This section is critical. Use it to describe each step of your sales process from first contact to closing the deal. Lay out clearly the key activities that define each step, including who's involved (such as the rep, their manager, the prospect, the buying authority), and what the deliverables are.

Outreach plan

How prescriptive the plan is will depend on how much control your salespeople have over their outreach, which in turn will depend on how experienced they are, how simple or complex the deals are, and how your company prefers sales to operate.

Set out the ideal number and timing of touches, and what medium to use. **Here's an example:**

Day	Morning	Afternoon
1	Send an email	-
3	Send an email	Make a call
5	Make a call	Leave a voicemail
7	Send an email	Make a call and leave a voicemail
10	Send an email and make acall	-

1. Source: https://www.thinkwithgoogle.com/marketing-resources/promotion-emotion-b2b/

Also, give some guidelines around when to continue pursuing opportunities and when to let them go.

Value propositions and messaging

Use this section to clearly express the customer value proposition for your target market(s); and to hold or link to resources such as:

- ✓ Outreach email templates
- ✓ Lead qualification frameworks and qualifying questions
- ✓ Conversation/voicemail guides and sales scripts
- ✓ Common objections and how to handle them (unless you make this part of your battlecard)
- ✓ Suggested meeting agendas
- ✓ Presentation decks and demos

Collateral and resources

Include case studies, testimonials, and customer references (or links to them) in your sales playbook, along with other relevant tools and resources, such as ROI or TCO calculators, and pitch and proposal tools in use at your company. Making it easy for sales to incorporate pre-approved collateral into their engagements with prospects and customers — and customize it as needed — will help to improve their close rates. What's more, it will reduce the likelihood of them using DIY content that may not accurately reflect your company's branding and messaging.

Company background/overview

This section will help new hires get up to speed with basic facts about your company. As well as a summary of its history, corporate philosophy, high-level goals, and organizational structure and hierarchy, you can also provide details about the sales organization, such as:

- ✓ How the sales function is split
- ✓ Who leads each team
- ✓ How territories are assigned
- ✓ The career path for salespeople in your organization

How to use CRM

Every company uses CRM differently, and many CRM systems are highly customizable. So even if your salespeople have used your CRM elsewhere, they won't necessarily know how to use it at your company. To ensure correct CRM usage, use this section to standardize:

- ✓ What each stage means
- ✓ When to move opportunities to the next stage

- ✓ Which fields are mandatory and which are optional
- ✓ How to create and analyze reports
- ✓ How to look at the dashboard
- ✓ How to use tasks, activities, and other features
- ✓ What sales should do in the CRM each day, week, month, quarter

Proposal and RFP tools and content

If you've implemented a proposal management solution, such as the Qorus platform, include a section in the sales playbook that explains how to use it to find content for — and streamline generation of — pitches, bids, and RFP responses.

KPIs

Your salespeople need to know what's expected of them. So if you want them to engage in a certain number of conversations each day, or to follow up with specific types of leads, use this playbook section to communicate those goals.

If you pair those KPIs with CRM analytics, your salespeople will be able to track their activities and see whether they're meeting those goals.

Self-sufficient teams + insightful content = more sales

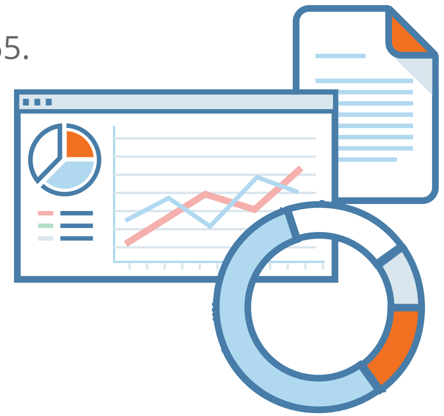
Our sales enablement software enables teams to quickly build personalized documents, such as proposals, presentations, emails, contracts and statement of work as they can discover, use and analyze the best content.

Sales teams enjoy greater self-sufficiency and success when they can build personalized customer documents themselves. Marketing teams gain superior insights into the value and usage of the content they create.

With Qorus, all this happens in the familiar world of Microsoft Office and CRM

Here's why sales and marketing teams love Qorus:

- ✓ It enables sales teams to quickly generate their own accurate, personalized pitches and proposals.
- ✓ Multiple stakeholders can collaborate on a document at the same time, from anywhere in the world.
- ✓ It simplifies the task of creating, managing and optimizing business development content.
- ✓ It plugs into Microsoft Office or Office 365.



Conclusion

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A great sales playbook will make life easier for your salespeople, and will help drive improved results for your company. But for it to remain useful, you need to treat it as a work in progress — one that you can update as your company's sales process evolves, its product and service range expands, and its strategy and target markets develop.

Keeping the playbook up to date will be easier if it's online and accessible to the whole team at any time, using an app such as Qorus. The Qorus app lets you work as a team when creating or updating a sales playbook, and makes it easy to find and link to relevant content. Best of all, you can do it all without leaving your familiar Microsoft Office environment.

Qorus for Office 365 offers similar benefits for your salespeople, too. They can import sales playbook content and resources directly into their emails, presentations and proposals — confident that it's accurate and up to date; and easily personalize it for the prospect they're engaging with.

The Qorus app also enables you to gain valuable insight into how salespeople are using the content provided, helping you to understand which resources are more or less valuable, and make adjustments accordingly to ensure your content investments deliver the best possible returns.

About Qorus

About Qorus

We help organizations create business critical documents more efficiently and accurately. From pitch presentations and proposals, to contracts, statements of work and RFP responses.

We work closely with Microsoft to enhance document productivity across the Office platform. Our software is incredibly powerful but highly intuitive and very easy to use. Even the most untechnical of users can quickly create accurate, personalized and compliant documents.

Our clients include law firms and organizations that want to streamline their bid, sales and content management processes.

Qorus Software has offices in Seattle, London and Cape Town.

If you'd like to find out more about Qorus and how we can help your company, visit the Qorus website at **www.qorusdocs.com** or contact us on **info@qorusdocs.com**

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60% less time required to respond to RFPs

50% less time wasted searching for reusable content

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