



## Bridging the Gap: Create a Playbook for Sales Enablement

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To increase the productivity and proficiency of sales teams and channel partners, companies must implement a common sales methodology that leverages the processes used by the high performers. This process—known as sales enablement—is focused on empowering salespeople to perform their job more effectively. For these processes to be successful, the organization relies on the marketing department to create the tools that support the sales enablement process and strategy, including "[personas](#)" and "[use cases](#)" (both of which were discussed in my preceding columns). This month, we take a look at "playbooks."

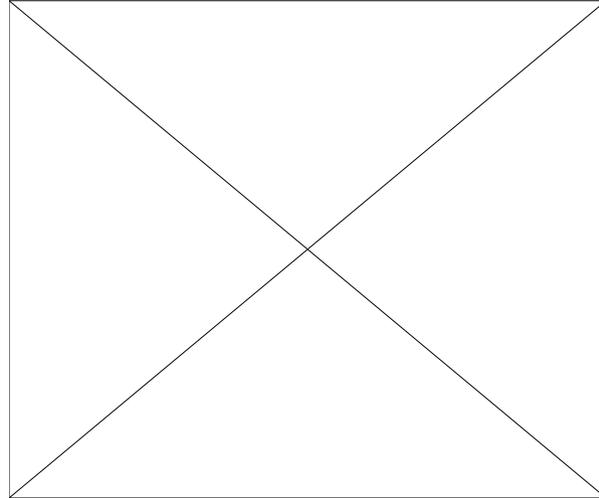
### **What is a Playbook?**

A playbook is a collection of tactics or methods. When this definition is applied to business, we are essentially creating a document—a sales playbook—that characterizes the roles and responsibilities for each member of the selling organization, lays out clear individual objectives to support the business plan, targets setting and performance measurement, and provides a common framework and approach for most effectively developing and closing opportunities. The sales playbook captures your company's knowledge about its markets, value propositions, offers, competitors and best practices. These are the very elements that fall within the marketing organization's domain, which is why marketing plays such a strategic role in its development.

### **Making a Good Playbook**

A good playbook defines your sales process and how it maps to your customer's buying process. (Read my article on cracking the code on [marketing and sales alignment](#).) It tells your team not only what to do but how to make it happen. When you create a playbook, you are planning for how your team will engage with a prospective customer. A well-designed playbook diagrams the engagement experience and serves as an alignment and enablement tool. It helps accelerate sales effectiveness and accuracy, thereby increasing sales performance and company revenues.

The sales and marketing teams should develop the playbook together. A play in the sports world is an action designed to achieve a specific purpose in specific conditions. Similarly, when you design a playbook, you need to define the conditions. Therefore, at a minimum, the following knowledge needs to be integrated into the playbook: customer analysis and buying process; company offer and value proposition; competitive analysis; sales methodology; and sales process.



Let's take a look at each of these:

**1. Customer analysis and buying process.** This includes identifying the market trends, key buyers and influencers, the ideal customer and the critical business issues customers are trying to solve. This section of the playbook should also outline the customer's buying process and the conditions or events that trigger consideration, evaluation and, ultimately, purchase. It is also a good place to provide customer profiles and reference the various personas.

This section of the playbook is not complete until you have answers to these two questions:

- 1) What is the profile of the ideal prospect?
- 2) What are the behaviors exhibited by a qualified lead?

**2. Company offerings and value propositions.** Many organizations begin with the company offer and value proposition. This information should follow the customer analysis so the customer context can be taken into consideration. In this section, you'll want to describe and clarify what your company offers and the ways in which your products and services address the customer's pain points and business issues. This is the time to explain why your company exists and how your company makes a difference to the market.

This section of the playbook is not complete until it clearly answers two questions:

- Why should people buy this product from you?
- What is the value they receive buying this product from you?

**3. Competitive analysis.** Typically customers have more than one company or solution they can use to solve their issues. Therefore a playbook is not complete without a competitive analysis. The focus of the competitive analysis should be on how the competitors' position themselves in the market, their selling process, typical strategies employees and recommendations on how to counter these moves. Name both the competitor's and your moves, and then diagram these counterpoints.

**4. Sales process methodology.** The complexity of most sales cycles is the result of multiple steps, decision-makers and decision criteria in the customer's buying process. This complexity creates variability and unpredictability. Once the customer's buying process has been mapped, you can define your sales process and methodology.

The sales process methodology section should include the map of the customer buying process and an outline of your sales process—that is, the standard set of critical steps that move the customer's buying process to a favorable outcome. While this section should outline the sales cycle stages and responsibilities, it should go beyond just describing the steps in the sales cycle. It should provide instructions on what information needs to be collected at each stage in the process, identify the players in each step, and how to assess the opportunity. The opportunity assessment information should recommend standard methods and tools that help the salespeople determine where they are in the customer buying process, enable them to analyze the situation and anticipate what they might do next. This section of the playbook should also provide the guidelines for entering and exiting opportunities and a list of the resources, skills, knowledge and tools needed for each stage in the process.

**5. Best practices.** Also, your company should articulate the most common customer objections to your product and specific instruction on how to address each objection in this section. The best practices section should provide a list of proven tips, techniques, as well as under which circumstances to use them. This section should also capture what hasn't worked in the past and associated lessons learned.

While developing a sales playbook is an extensive investment, it provides numerous benefits to your organization such as: aligning the selling organization (marketing, sales, etc.) around the customer pains and preferences, improving sales effectiveness and productivity, and exposing and correcting weaknesses in the current sales process.

When completed, your playbook becomes a living document of your sales methodology, and provides tactical guidelines and instructions that enable your sales team to retrieve important customer decision-making information to address the vulnerabilities of both your company and competitors, leverage strengths, differentiate your offers, prove business value and, ultimately, improve your win/loss ratio.