Contents

[**Key Insights**](#_lyp75iwf6hqc) **3**

[**Your Company & Product**](#_m6xuyvi6lrid) **3**

[Company Overview](#_dwz1xepougw2) 3

[Company Mission](#_121l7y55k8ox) 4

[Company Core Values](#_k8pwsanu2i84) 4

[Product Overview](#_y2anv7yw0jil) 4

[Product / Service Quick Reference Guide](#_9kroemarjf1h) 4

[Pricing Guide](#_5urcoqwp17zj) 4

[**Your Sales Team**](#_l90dr5ah6vxc) **5**

[Organizational Chart – Sales Department](#_2m1f5kczjibm) 5

[Job Descriptions](#_4aaqi1ft8rgt) 6

[VP of Sales](#_xefmk9w0ufjz) 6

[Director of Sales](#_q4xo6pi5vsge) 6

[Sales Manager](#_v1z3ss253mic) 6

[Salesperson (Account Executive)](#_k2o9kgmty63m) 6

[Sales Associate (Canvasser)](#_76j3vc7nxiei) 6

[Sales Territories](#_5bueqrmx5cno) 7

[**Sales Tools**](#_7mk84yb6j9h1) **7**

[SPOTIO: Field Sales Enablement Tool](#_nlre235gmolw) 7

[Salesforce: CRM (Customer Relationship Management) Tool](#_2xtu0zu18v9f) 7

[MailChimp: Email Marketing Tool](#_6rt8ad35g1l6) 7

[Sales Tool 1](#_hn0iyb27wakc) 8

[Sales Tool 2](#_50kp6gileqm0) 8

[Sales Tool 3](#_dngtvfcakgte) 8

[Sales Tool 4](#_t74xsic22p2) 9

[Sales Tool 5](#_lo9wwyebty0w) 9

[**Our Customers**](#_xsvy3fshzz95) **9**

[Ideal Customer Profile](#_soapagcajk3k) 9

[Demographics](#_7y57d2co98i1) 10

[Psychographics](#_rk2cgxtocijx) 10

[Behavioral](#_mc7vnbmxsase) 10

[Environment](#_ocutromfza52) 10

[Value Props](#_mw0bh2jm6qkf) 10

[Key Criteria](#_nnmdmft07d31) 11

[Our Product](#_2uzseovb9crf) 11

[Buyer Personas](#_sgh2eh5mnuu7) 11

[Buyer Persona](#_cv9aaocqbyv5) 11

[Most Common Customer Pain Points](#_ykuh4u35j5ft) 12

[Four Main Types of Pains Points](#_jtcv3s28pl86) 12

[How to Solve Pain Points](#_z2pwh51cc0i5) 12

[**Sales Process & Methodology**](#_wkeeevnf262c) **13**

[Customer Journey Map](#_4rm63iquzp96) 13

[Step 1](#_6vke2t9dgq4n) 13

[Step 2](#_kk57vd8r9jiv) 13

[Step 3](#_1vy3btn44pkb) 13

[Step 4](#_z11sbs9roxr7) 13

[Step 5](#_qrvon9ln65lx) 13

[Do](#_u81u6qtlfd6h) 13

[Think](#_hgybgur52ums) 13

[Feel](#_v9aq3kyd4ch6) 13

[Assets](#_gr61zlcp1maz) 13

[Lead Funnel](#_jpguegionm9f) 13

[Sales Methodology](#_lm5p9omgekb) 14

[**Conversation Guides**](#_pb474cf4m1lu) **14**

[Elevator Pitch](#_c7cy16a7bc5k) 14

[Create your elevator pitch using this outline:](#_y511ho1twnsl) 14

[Sales Pitch Examples](#_tz9x6t7v3fgk) 15

[Discovery & Open-ended Sales Questions](#_129gx7r4d4of) 15

[The 26 Most Valuable Open-Ended Sales Questions](#_li8qzugkwqsn) 15

[Objection Handling](#_wo08l9w8sv27) 16

[10 Examples of Sales Objections](#_mznv52i11lpx) 16

[**Competition**](#_ylwkrfykxch8) **17**

[Competitive Advantages](#_mbluj65axt1o) 17

[Feature / Function](#_ubiumgpxfn8g) 17

[Competitive Advantage](#_8to9lsyk8cxv) 17

[How We Win](#_dzdh7hsykb76) 17

[**Content & Sales Tools**](#_r6j7kg91cbui) **17**

[Internal & Customer-facing Content](#_7azyl2ijbhcz) 17

[Customer-Facing Content Assets](#_a9zew8getaf1) 18

[Internal Sales Tools](#_b2600c1s19ze) 18

[**Expected Metrics**](#_7civy4hl222j) **18**

[Examples of Common Sales Metrics](#_mz5x7pz3hzbj) 18

***PLEASE NOTE:*** *All examples provided in the Sales Playbook Template use SPOTIO as the sample company and will need to be changed to fit your company’s specific needs*

# Key Insights

Key insights should be based on primary research with customers and challenge prospects to think differently about their current situation

* Industry Statistics & Facts
* Customer Statistics
* Company Statistics
* Demonstrative Statistics

[EXAMPLE]

* The [2018 State of Field Sales Report](https://spotio.com/the-state-of-field-sales-report-2018/) found that only 53% of outside sales professionals believed they were equipped with access to the effective tools and technology needed to complete their day-to-day job requirements
* 15% of respondents said no, they didn’t have access to effective tools and technology, while 32% didn’t respond
* Similarly, 77% of inside sales reps said yes to the same poll above
* Insidesales.com found that companies are investing an average of $4,581 per outside sales rep on software, up 22% from 2014
* Hardware is the #1 piece of technology field sales teams state they wish they had, including laptops, tablets, and quicker cell phone technology
* CRM software, specifically as it relates to lead management, is cited as the greatest area for improvement among field sales teams
* 38% of respondents use Salesforce, while 30% use Microsoft Dynamics
* In 2017, Forbes found that 59% of inside account executives (AEs) and 65% of outside AEs attained their target sales quota
* Quota attainment is 10% higher for outside sales reps

# Your Company & Product

## Company Overview

[EXAMPLE] SPOTIO is the #1 field sales enablement platform for door-to-door and business-to-business sales reps and managers

## Company Mission

[EXAMPLE] Make every field sales team more productive? #challengeaccepted

## Company Core Values

[EXAMPLE]

1. **Know The Customer** – Know their pains, their problems, and how we fit in.
2. **Make It Better** – Continuous improvement in business & personal life. Deliver 10x what the customer pays.
3. **All Relationships Matter** – Don’t burn bridges.
4. **Be Great** – Aspire to be your best with integrity.
5. **Be Plugged In** – Be productive, not busy.
6. **Know Where We Stand** – Open, honest feedback with clear visibility to the metrics.

## Product Overview

[EXAMPLE] **SPOTIO centralizes sales team activity to enable insane productivity, increase revenue and shorten sales cycles**

* Help sales teams get more of the right leads
* Eliminate activities that keep sales reps from actively selling
* Uncover leaks in the sales process to drive desired outcomes

**Everything field sales teams need to be successful**

* Sales Prospecting – Drive more meetings with the right prospects
* Territory Management – Designed to fit the customer’s business
* Sales Analytics – Measure performance of reps, teams or entire organization

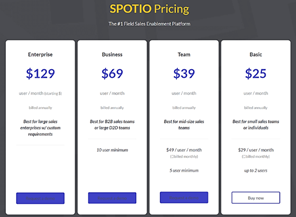
## Product / Service Quick Reference Guide

*Insert Link to Document / Resources*

## Pricing Guide

*Your pricing guide is a description of the costs associated with your company’s product / service.*

[EXAMPLE]

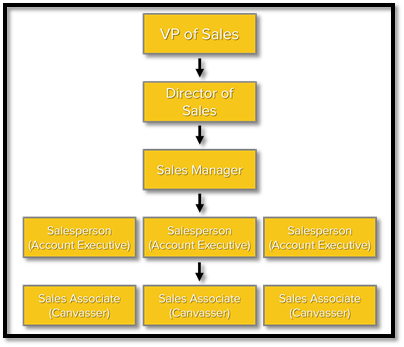


# Your Sales Team

## Organizational Chart – Sales Department

*Your org chart is a diagram that represents the structure of your sales department. It shows the relationships and relative ranks of its parts, positions and jobs.*

[EXAMPLE]



## Job Descriptions

*What are the primary responsibilities associated with each role in your sales organization?*

[EXAMPLE]

### VP of Sales

Primarily responsible for delivering the right revenues, whether defined as a hard number, growth or profit target, or market share goal. Also responsible for recruiting, assisting the sales team, and building sales strategy and tactics.

### Director of Sales

Primarily responsible for managing all sales efforts, meeting targets, keeping the sales team motivated, strategically launching new products or services into the market and ensuring customer service standards are high and continually improving. Long-term strategic planning for the company is also a key focus for a sales director. Meetings with the heads of various departments, especially marketing, usually happen frequently to brainstorm regarding product launches or proposals.

### Sales Manager

Primarily responsibility is to see to it that salespeople meet quotas and uphold any policies passed down from above. Also responsible for leading and coaching a team of salespeople, assigning sales territories, setting quotas, mentoring the members of her sales team, assigning sales training, building a sales plan, and hiring and firing salespeople.

### Salesperson (Account Executive)

Primary contact person for a relationship between the vendor and customer. The account executive calls upon a client to introduce new products and services, arranging for technical, design or other support staff to travel with him or her to conduct show-and-tell demonstrations and help with the sales pitch, negotiates the terms of a sale, and once business is secured, ensures the client is satisfied on an ongoing basis.

### Sales Associate (Canvasser)

Primarily work in neighborhoods, or sales territories, to inform the public about their company’s specific products or services and set an appointment for the salesperson to pitch the product or service.

## Sales Territories

How will you evenly [create and assign sales territories](https://spotio.com/blog/the-complete-guide-to-sales-territory-mapping/) for your sales reps? Your sales territory map is a plan of attack for your field sales organization, providing the ability to designate specific neighborhoods or areas to each rep. Mapping sales territories allows you to target quality prospects with legitimate buying potential and prevents salespeople from overlapping each other and working the same area.

[EXAMPLE]

SPOTIO uses [target market demographics](https://spotio.com/blog/the-complete-guide-to-sales-territory-mapping/) to assign sales territories

* Puts sales reps in front of [pre-qualified prospects](https://spotio.com/features/sales-intelligence/)
* Eliminates time spent in the field knocking doors aimlessly
* Speak with qualified customers that match our ideal customer profile (ICP)
* Talk to homeowners with actual buying potential

# Sales Tools

*Provide a complete list and description of the tools your sales team will use on a day-to-day basis, along with additional resources containing helpful information.*

[EXAMPLE]

### [SPOTIO](https://spotio.com/blog/the-complete-guide-to-sales-territory-mapping/): Sales Performance Management

SPOTIO is the #1 field sales acceleration platform. Propel your sales team to win.

### [Salesforce](https://www.salesforce.com/): CRM (Customer Relationship Management) Tool

A technology for managing all your company’s relationships and interactions with customers and potential customers. The goal is simple: Improve business relationships. A CRM system helps companies stay connected to customers, streamline processes, and improve profitability.

### [MailChimp](https://mailchimp.com/): Email Marketing Tool

Mailchimp is a marketing automation platform that helps you share email and ad campaigns with clients, customers, and other interested parties. Our approach to marketing focuses on healthy list management practices, beautifully designed campaigns, and powerful data analysis.

|  |  |
| --- | --- |
| Sales Tool 1 | |
| **Name** |  |
| **Website** |  |
| **Resource 1** |  |
| **Resource 2** |  |
| **Description** |  |

|  |  |
| --- | --- |
| Sales Tool 2 | |
| **Name** |  |
| **Website** |  |
| **Resource 1** |  |
| **Resource 2** |  |
| **Description** |  |

|  |  |
| --- | --- |
| Sales Tool 3 | |
| **Name** |  |
| **Website** |  |
| **Resource 1** |  |
| **Resource 2** |  |
| **Description** |  |

|  |  |
| --- | --- |
| Sales Tool 4 | |
| **Name** |  |
| **Website** |  |
| **Resource 1** |  |
| **Resource 2** |  |
| **Description** |  |

|  |  |
| --- | --- |
| Sales Tool 5 | |
| **Name** |  |
| **Website** |  |
| **Resource 1** |  |
| **Resource 2** |  |
| **Description** |  |

# Our Customers

## Ideal Customer Profile

Your ideal customer profile (ICP) is a description of the company, not the individual buyer or end user, that’s a perfect fit for your solution. Your ICP should focus on relevant characteristics of target accounts, such as:

* Industry / Vertical
* Employee Headcount — Companywide And Within Key Departments
* Annual Revenue
* Budget
* Geography
* Technology they Use
* Size of Customer Base
* Level of Organizational / Technological Maturity

[EXAMPLE]

|  |  |
| --- | --- |
| Demographics | (Who They Are) |
| **Median Home Income** | Enter text here… |
| **Resident Age** | Enter text here… |
| **Homeowner vs Renter?** | Enter text here… |
| **Home Market Value** | Enter text here… |
| **Credit Capacity** | Enter text here… |

|  |  |
| --- | --- |
| Psychographics | (How They Think) |
| **Culture** | Enter text here… |
| **Growth Orientation** | Enter text here… |
| **Eco Friendly?** | Enter text here… |

|  |  |
| --- | --- |
| Behavioral | (How They Act) |
| **Equipment** | Enter text here… |
| **Buying Process** | Enter text here… |

|  |  |
| --- | --- |
| Environment | (Their Situation) |
| **Technology Landscape** | Enter text here… |
| **Geographic Landscape** | Enter text here… |
| **Alignment with I/T** | Enter text here… |

## Value Props

*The collection of reasons why a buyer buys; in essence, factors that affect whether they purchase, and from whom.*

[EXAMPLE]

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **For** | **Product Is** | **Ideal For** | **Better Than** | **Because** |
| Key Criteria | Describe Ideal Customer Profile | Provide concise description | Describe best use or application | Identify primary competitor / competing approach | Identify competitive advantages & differentiators |
| Our Product |  |  |  |  |  |

## Buyer Personas

Buyer personas are semi-fictional representations of your ideal customers based on market research and real data pertaining to your existing customers. They provide an exceptional structure to help determine where to focus your time, guide product development, and allow for alignment across the entire organization.

[EXAMPLE]

|  |  |
| --- | --- |
| Buyer Persona | |
| **Age** | Enter text here… |
| **Income** | Enter text here… |
| **Experience** | Enter text here… |
| **Education** | Enter text here… |
| **Decision-Making** | Enter text here… |
| **Likes & Dislikes** | Enter text here… |
| **Common Pain Points** | Enter text here… |
| **Media** | Enter text here… |
| **Habits & Skills** | Enter text here… |
| **Research** | Enter text here… |
| **Technology Skills** | Enter text here… |
| **Buying Power** | Enter text here… |
| **Purchasing Process** | Enter text here… |

## Most Common Customer Pain Points

Pain points are specific problems that your potential customers are actively experiencing. They’re commonly grouped into several broader categories.

[EXAMPLE]

### Four Main Types of Pains Points

1. **Financial Pains** – Prospects spending too much money on their current product or solution and looking to reduce their spend
2. **Productivity Pains** – Prospects who waste too much time using their current product or solution and would like to be more efficient
3. **Process Pains** – Prospects looking to improve their internal processes due to inefficiencies with their current product or solution **Support Pains** – Prospects who aren’t receiving the support needed throughout critical stages of the customer buying journey or sales process

### How to Solve Pain Points

* List your customers’ most common pain points
* Determine the benefits of your product / solution that address each pain point
* Create an action statement showing how your company will solve each pain point

# Sales Process & Methodology

## Customer Journey Map

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Step 1 | Step 2 | Step 3 | Step 4 | Step 5 |
| Do | What do you want your customers to do? |  |  |  |  |
| Think | What do you want your customers to think? |  |  |  |  |
| Feel | How would you like your customers to feel? |  |  |  |  |
| Assets | List the brand assets/collateral customers come into contact with |  |  |  |  |

## Lead Funnel Turning Your... - Good images

A [lead funnel](https://spotio.com/blog/turning-your-lead-generation-efforts-on-autopilot/) is an outlined map of the buying process that guides prospects from the beginning of your website to the point they convert into a customer, using a logical step-by-step sequence. Lead funnels vary depending on your target audience.

Need additional information on building your lead funnel?

The complete guide to [Turning Your Lead Generation Efforts on Autopilot](https://spotio.com/turning-your-lead-generation-efforts-on-autopilot/)

## Sales Methodology

A [sales methodology](https://spotio.com/blog/sales-methodologies/) is an element in the sales process referring to the framework, philosophy, or general tactic that guides how a salesperson approaches each step within the process.

# Conversation Guides

## Elevator Pitch

An elevator pitch is a very simple and concise, 30-second memorable description of what you do and what you sell. It should be straight to the point. The best way to create your elevator pitch is to ask: “If people remember one thing about your company, what would it be?”

### Create your elevator pitch using this outline:

**1. Who are you?**

Before jumping into your elevator pitch, you'll need to introduce yourself to the person you're talking to. Write a sentence about who you are and what your role is at the company. This helps start the conversation on the right foot.

**2. What does your company do?**

Have a clear understanding of what your company does. What's the company's mission and goals for its product or service? Include a section in your pitch where you introduce the company. The more you know about the business, the easier it will be to cater your pitch to the person you're talking to.

**3. What's your company’s value proposition?**

What does your company do exceptionally well that sets its product or service apart from the rest? Write a brief, 1-2 sentence statement about the value the product or service provides to current customers.

**4. Grab the prospect’s attention.**

Pull in your audience with an exciting story about a customer or the company founders. Or offer up a fascinating fact or statistic about the product. An attention-grabbing hook keeps people engaged with what you're saying.

**5. Read and edit.**

Read your pitch aloud and make sure it sounds natural. If your pitch is overly formal, you’ll come off as stuffy and uptight. Instead, make your pitch conversational to keep your audience captivated and considerably more likely to continue the conversation.

## Sales Pitch Examples

*After your elevator pitch, the* [*sales pitch*](https://spotio.com/blog/sales-pitch-examples/) *serves as a guide to direct and steer the conversation. Your sales pitch should help to establish the salesperson as a credible, reliable source, and eventually close the deal. Use this thought process when developing and tweaking your sales pitch.*

Comedian Kenny Brooks gave one of the best door-to-door sales pitches ever. You can [follow his outline here](https://spotio.com/blog/comedian-kenny-brooks-best-door-door-sales-pitch/).

## Discovery & Open-ended Sales Questions

The [right questions at the right times](https://spotio.com/blog/open-ended-sales-questions/) allow salespeople to get inside the head of the prospect to better understand their pain points and gauge the interest level. Open-ended, also called discovery questions, are designed to help you get to know the consumer better.

### [The 26 Most Valuable Open-Ended Sales Questions](https://spotio.com/26-most-valuable-open-ended-sales-questions/)

**Qualifying Questions**

1. When do you need to have this issue resolved by?
2. Do you have a projected budget set aside to solve this issue?
3. How are you currently handling the challenges you face?
4. Who else needs to be involved in the decision-making process?

**Needs-Based or Pain-Based Questions**

1. When do you typically experience these issues?
2. How is this problem affecting you financially?
3. If you could change anything about your current solution, what would it be?
4. Have you thrown in the towel on trying to resolve this issue?

**Impact or Benefit-Driven Questions**

1. Can you describe how important you feel solving the problem is to you?
2. What are the consequences of not addressing it?
3. What would it mean to your business if you could rely on a trustworthy supplier?

**New Future or New Reality Questions**

1. How would resolving these issues impact and improve your day-to-day work?
2. What would you be able to achieve in the next year by making this improvement?
3. Putting aside time and money, what changes would you make to your current system if you had the ability to do whatever you wanted?

**Objection-Based Questions**

1. The common objection is, “I need to discuss this with my supervisor,” so the question could be: Who else is involved in making these types of decisions?
2. The common objection is, “I can’t afford this right now,” so the question could be: What budget do you have allocated for something like this?
3. The common objection is, “I am not interested in your product or service right now,” so the question could be: When are you interested in learning how I can save you X% with this product/service?

**Buyer History Questions**

1. What has your past purchase experience been with [insert product/service]?
2. When was the last time you evaluated something like this?
3. Why or why not would you say you were satisfied with your past experiences with this vendor?

**Rapport Building Questions**

1. How would you describe the level of service with your current provider?
2. What can we do to earn your business?
3. What motivated you to take this call with me?
4. Which other vendors are you evaluating?
5. What concerns do you have about making changes?
6. What have I not covered that you would like to know more about?

## Objection Handling

*The point in the sales process in which the salesperson must overcome a certain level of resistance or a specific objection from the potential customer. Objections shouldn’t necessarily be associated in a negative connotation, as they typically are. The right objections actually signal a genuine level of interest.*

### [10 Examples of Sales Objections](https://spotio.com/blog/how-to-confidently-handle-sales-objections-a-field-tested-action-plan/)

*Create an actionable response that eliminates the prospect’s concern for each of the examples below following the outline above.*

1. “It’s just too expensive.”
2. “We’re fine with what we have.”
3. “You’re offering too much.”
4. “This isn’t the right time.”
5. “You’ve got the wrong person.”
6. “It’s too much work to switch or implement.”
7. “We’re going with a different company.”
8. “I don’t know if we really need this right now.”
9. “I don’t see the potential for ROI.”
10. “I don’t want to get stuck in a contract.”

# Competition

## Competitive Advantages

*When was the last time you and your team took time to consider how your rivals operate, or might operate based on changes that you make? For example, if you brought a new product or service to market:*

* *Are they likely to discount their prices?*
* *Provide incentives to their partners in an effort to tie up the channel?*
* *Extend offers to customers that will dissuade trial of -- and switching to -- your offer?*

*As part of developing a go-to-market plan for innovations and market strategies, consider technology, functionality, customer segments and requirements, channels and partners, pricing and promotion.*

[EXAMPLE]

|  |  |  |  |
| --- | --- | --- | --- |
|  | Feature / Function | Competitive Advantage | How We Win |
| **Competitor #1** | Enter text here… | Enter text here… | Enter text here… |
| **Competitor #2** | Enter text here… | Enter text here… | Enter text here… |
| **Competitor #3** | Enter text here… | Enter text here… | Enter text here… |
| **Competitor #4** | Enter text here… | Enter text here… | Enter text here… |

# Content & Sales Tools

## Internal & Customer-facing Content

*You’ll need to edit & update the content resources to match what your company has available.*

[EXAMPLE]

|  |  |  |
| --- | --- | --- |
|  | Customer-Facing Content Assets | Internal Sales Tools |
| **Prospecting:** Needs Analysis | -- Buyers Guide  -- Infographics  -- Research Report | -- Personalized Video Intro Script  -- LinkedIn Connection Request Templates  -- Appointment Booking Script |
| **Qualification:** Discovery | -- Whitepapers  -- Overview Videos  -- On-Demand Webinars | -- Lead Qualification Checklist  -- SPIN Selling Questions Tool  -- Feature, Advantage, Benefit Tool |
| **Demo:** Consideration | -- Case Studies  -- Datasheets  -- Customer Testimonials | -- Demo Script  -- Objection Response Tool  -- Key Account Analysis & Reporting Tool |
| **Proposal:** Decision | -- Customer Reviews on 3rd Party Websites  -- ROI Calculator  -- Customized Presentation Deck | -- Sales Presentation Template  -- Sales Proposal Template  --Decision-Maker Influencer Map |
| **Contract:** Implementation | -- Onboarding Package  -- Service Guides to Implement  -- Customer Community | -- Contract Template  -- Pricing Guide  -- CPQ System |

# Expected Metrics

*Sales metrics are extremely valuable because they provide exceptional insights salespeople can use to determine where they’re experiencing success or falling a bit short. The goal of* [*metric-based activities*](https://spotio.com/blog/sales-metrics/) *is to have the ability to analyze where each salesperson specifically requires the most work developing their skill set.*

## [Examples of Common Sales Metrics](https://spotio.com/blog/the-4th-metric-you-must-know/)

**Contact Rate:** of the # of attempts you make, how many do you talk to 

Example: if you knock 100 doors and 35 answer and you talk to them then you have a 35% Contact Rate

**Lead Rate:** of the # of contacts you make, how many are interested or want to move along in the sales process

Example: if you talk to 35 people and 7 are interested they you have a 20% Lead Rate

**Close Rate:** of the # of Leads you get, how many end up buying 

Example: of the 7 Leads you have 3 end up buying so you would have a 43% Close Rate

**Qualified Rate:** out of the # of Contacts you make how many are Qualified to buy 

Example: if I talk to 35 homeowners and only 5 are Qualified to buy then you have a 15% Qualified Rate

[EXAMPLE]