A Beginner's Guide to Writing a Sales Playbook

veelo

A good sales playbook can spell the difference between success and failure. Harvard Business Review found companies with a formal sales process generate 28% more revenue than those with an ad hoc approach. If you want your reps to win more deals, they need a sales playbook that will show them what they must know, say, and do at every stage of the buyer's journey. Because if reps don't follow best practices for your company, they won't succeed.

We created this guide for sales enablement professionals tasked with spearheading their company's sales playbook initiatives. In the next few pages, we'll share a plan to manage this project and tips for creating the content sellers will use in every deal. Our goal is to demystify sales playbooks, and provide a structure that you can adapt to a wide variety of business development goals.

Step 1: Define Your Sales Playbook Project

Aberdeen found top teams are 300% more likely to implement sales playbooks compared to laggard companies. But if all you do is create a playbook, that won't be enough. If you want to give your reps a clear path to success, your sales playbook needs a clear focus. Ironically, a playbook that tries to be everything for everyone is usually so dense that no one uses it. But a focused sales playbook can be the guide your sellers need to win more deals and increase revenue.

Start with organizing your goals using the following table format:

Playbook Organization

Playbook Focus
- Audience
- Product/Vertical
- Format/Deliverable

Subject Matter Experts

Team Members to Include:

✓
✓
✓
✓
✓
✓

Goals & Objectives

Purpose & Problems to Solve

1.
2.
3.

Source Material

- **Your Audience –** Is this playbook for the SDR/BDR team, Account Executives, Customer Success Managers, or another group specific to your company? Your audience will determine the depth and breadth of content. Each role has different steps, talk tracks and required actions that will shape your sales playbook.
- **Product/Vertical –** Many organizations create a sales playbook for each product or product family. This helps keep the sales playbook concise, so sellers stay engaged. If you're just getting started, focus on the product or vertical that will drive the greatest results.
- **Picture The Final Version –** Before you begin, you need to know what your sales playbook will look like when it's complete. For example, will it be a 20-page PDF or a set of interactive modules in the cloud? Determine this early and hold your team accountable. This lets you guide the scope of your sales playbook, and prevents it from turning into a giant manual no one will read.

Goals and Objectives

Most companies have more than enough material to create a sales playbook. However, you'll see the best results if you align your content with the highest priorities for your business. Here are some examples:

- Increasing pipeline and revenue for a new product
- Optimize sales onboarding to ramp new hires faster
- Promote cross-selling of additional products
- Guide field reps on selling to enterprise accounts.
- Improve objection handling and negotiation skills to increase profit margin

Organize Your Sales Playbook Development Team

Playbooks can be difficult to write because they rely on information from many different team members throughout the organization. For example, your marketing team knows about your target customer and which content resonates with prospects in the early stages of the buying cycle. Meanwhile, sales leadership knows which questions to ask prospects during Discovery Calls and Negotiations. All too often, the hardest part of writing a sales playbook is getting everyone on the same page.

No matter what type of sales playbook you create, you need to seek out guidance from your team. Identify contributors up front and tap subject matter experts to kick off the project together. Ensure you have representation from marketing, sales, training, and executive leadership, but be careful who you invite. You need to be specific about each member's role in the group, and whether they will only provide input or review the finished product. Too many people without clear roles can grind your project to a halt.

Identify and Gather Source Material

Once you decide on the type of sales playbook, your audience, and your development team, it's time to gather your source material. Remember, it's not a lack of material that prevents companies from achieving success with their sales playbooks. It's a lack of planning. And the same holds true for your source material. Consider the following assets, many of which may already exist within your organization:

- Company story and messaging
- Ideal customer profile and qualification criteria
- Target market and positioning descriptions
- Selling motion
- Sales stages and exit criteria
- Value proposition examples
- Competitive differentiation slides and talk tracks
- Case studies and customer success stories
- Training on your selling methodology
- Product information - features and benefits
- Sales-Operations handoff steps
- Quick reference videos
- Additional resources and marketing content

Gathering source material re-emphasizes the need for collaboration. Members of your sales playbook development team will be able to surface valuable collateral that you might never find on your own. Welcome their contributions, and your sales playbook will be that much better.

Step 2: Prioritize and Outline Your Table Of Contents

Once you determine the focus of your sales playbook, the next major step is to outline the Table of Contents. As a general goal, your playbook should guide the seller through the entire sales process, from lead to customer conversion. If you have your sales stages defined with clear exit criteria, align your playbook to these stages.

However, based on our research of hundreds of companies, fewer than 30% of teams have defined their sales stages with this much clarity. If your organization has not defined sales stages with specific exit criteria, then work with sales leadership to identify key steps of the sales process and what sellers need to do in each stage.

Here are examples of three different Sales Playbook Tables of Contents:

SDR Playbook Table of Contents

- Company Overview
- Our Products
- Sales Process Step-By-Step
- Buyer Personas
- How to setup an email / call cadence
- Messaging and Examples
- Using the CRM
- Compensation Plan
- Key Performance Indicators
- Resources

Account Executive Playbook Table of Contents (General)

- Sharing Our Story with Prospects
- Our Sales Methodology
- Qualification and Value Questions
- Go-To-Market Focus
- Understanding Our Target Industries
- Leverage Our Partners
- Competitor Insight and Talk Tracks

Account Executive Playbook Sales Stages Defined

- Our Story and Value
- Selling Motion by Sales Stage
  - Discovery
  - Validation
  - Needs Analysis
  - Proposal
  - Negotiation Decision
  - Contract & Win
- Competitive Differentiation
- Battle cards
- Success Stories & Proof Points
- How to use the ROI Calculator
- How to enter an Order
- Resources

Step 3. Write

Once you outline your Table of Contents, it's time to write. Keep each section relatively short, and strive for no more than 20 pages. Anything longer than that and your sales team won't use it.

Consider modularizing your playbook using a sales enablement platform or sales content management system in the cloud. This allows you to include certain types of multimedia - like video coaching - that can improve knowledge retention. For example, the scientific journal *Memory* found that saying something out loud can improve learning speed by up to 15%. These gains are much more likely if sellers are prompted with video coaching exercises.

Include real-life insight for your sales team. This highlights the importance of including sellers in your sales playbook review team. Ask for suggestions from some of your top reps to make sure your playbook is readable and relevant.

Use customer-centric language, and avoid marketing jargon. Write your sales playbook in a conversational tone in a way that a salesperson would speak to a customer.

Add tables, diagrams and quick visual references where you can. It's best to work with a graphic designer who can layout a template branded to your company guidelines. Include audio tracks and video clips to showcase best practices and increase engagement. If you write your sales playbook in the cloud, you can even include hyperlinks to source materials for team members who want more detail.

Step 4. Managing Internal Review & Approval

It's vital to hone in on the right focus and audience for the first draft of your sales playbook. Once you have this, it's time to manage the internal review process and obtain sign-off for the final version. Here are a few tips:

Welcome feedback and create a review form or set of guidelines. Include a summary of the project at the top:

- Re-state your original goals and how this project will help the organization.
- Summarize reviewers and roles
- Include the due date for when you need their review. Provide the overall timeline so they can see how their task impacts the greater schedule. The reviewer will be more likely to finish on time as a result.
- Instructions for edits. For example, is there a specific section you want them to review? Do you want them to edit for subject matter, or just grammar and style?
- Open note field for final comments

Make sure to include thank yous. Serving on a review team is no easy task. The individuals you select for this group will need to take time away from their daily responsibilities to help.

- Thank them for their input and support before, during, and after the review process.
- Let them know this is an important initiative for the company, and you value their suggestions.
- Once you launch the sales playbook, send updates of your reps' progress to members of the review team. This will keep them engaged, and they'll be more likely to assist you with future projects.

Not everyone will agree on every element of your sales playbook, and that's OK. The playbook development team needs to keep the organization's priorities in mind. One playbook can't accomplish everything. Get buy-in on this sales playbook, and then you can use the same framework to create future playbooks for other priorities and audiences.

Step 5: Publish

All your preparation counts for nothing unless you publish your playbook in a form that sellers will use to achieve their goals. We've found the best sales playbooks have the following characteristics:

- Easy to Reference
  Include interactive links to each section in the table of contents so sellers can locate the right resources at the right time. Even better, break up your sales playbook into concise modules that live in the cloud, so sellers can easily search for and find what they need. The Journal of Applied Psychology found breaking up content into bite-sized pieces makes the transfer of information 17% more efficient. As a bonus, when you write and publish sales playbooks in the cloud, they are much easier to manage and update.

- Engaging
  If all you do is break up a text-heavy playbook into chapters, it won't improve seller engagement.
  - Research has shown that our brains process visuals 60,000 times faster than text. This makes videos a great option for demonstrating sales best practices. These can be anything from examples of top sellers negotiating to the marketing team explaining the benefits of a new product.
  - Add gamification elements like Hide-and-Reveal panes and Drag-and-Drop exercises. These techniques improve engagement and increase learning retention.
  - Challenge your sellers with knowledge checks and quizzes to prepare them for real-world situations. If you use a playbook in conjunction with your sales onboarding program, your sellers will learn more quickly and remember more of what they learn.

  Great sales playbooks use a variety of methods to demonstrate the hallmarks of good selling habits and best practices.

- Accessible
  If you want your playbook to improve seller performance, you need it make it easy for them to find what they need. Once you publish your sales playbook in the cloud, you can use a sales enablement platform to deliver these digital modules within your sellers' workflow. This way, reps can access it within their CRM, on a mobile device, and in their email.

  The best sales enablement platforms go a step further, and allow you to tag specific playbook modules to different sales stages. For example, you might have several different playbook modules related to Needs Analysis. If you use a sales enablement platform to publish within the CRM, your sellers will see the right playbook modules when they advance an opportunity to that stage. Extend this process to all your sales stages, and you can see the benefits of publishing a sales playbook within your sellers' workflow.

  But what if you don't have clearly defined sale stages? Modern sales enablement platforms also allow you to tag sales playbook modules by industry, buyer persona, and product. The key is to make your sale playbook a natural extension of your CRM, as familiar to your sellers as smiling and dialing.

  And if you don't have a CRM? The best sales enablement platforms make it easy to sync sales content from across your organization, on any device. This way, your sellers can always access playbooks that represent a single source of truth.

Summary

Sales playbooks give your reps a clear path to success. The best kind of sales playbooks are concise, easy to reference, and aligned with your sellers' workflow. But no matter where you are in your sales playbook journey, don't go it alone. Define the scope of the project early, and specify your intended audience.

When you're just getting started, it's important to prioritize your ambitions and focus on the area where a new sales playbook will have the greatest impact. Once you see the results, you can adapt these steps to create additional playbooks for future goals. Take a crawl, walk, run approach, and pretty soon your sales playbooks will become your competitive advantage.

Additional Resources

5 Ways You Are Sabotaging Your Playbooks

The right sales playbook can give your team an edge. But common mistakes can derail the project before you get started. Read this guide and you will learn:

- Solutions to the most common sales playbook problems
- How to create sales playbooks based on brain science
- Easy steps to make your playbooks more effective with sales enablement technology.

About Veelo

Veelo is a single, easy-to-use sales enablement platform that streamlines playbooks and optimizes sales performance. Built on brain science principles and powered by machine learning alongside built-in tools, templates, and integrations, Veelo ensures sellers are equipped with the content, coaching and productivity tools they need to win.

Veelo's team specializes in sales playbook creation as a professional service. Companies like Qorvo, Jama Software, United Language Group, Tripwire and more use Veelo to improve sales performance. Learn more at **veeloinc.com.**

Contact us today for a personalized demo:
www.veeloinc.com | sales@veeloinc.com | (855) 414-8760