# Selling Sales Services Playbook for Agency Partners

| Definition & Opportunity Identification | *Selling Marketing Basic, Pro, or Enterprise to your customers already using the HubSpot Sales Pro products* | |
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| **How to Approach Different Personas** | | |
| **Persona** | **Possible Triggers** | **Value Proposition** |
| **Hybrid Sales & Marketing Leader / Owner Ollie** | • Ambiguity / lack of structured sales process<br>• Time wasted on CRM admin, busywork<br>• Reporting in multiple places<br>• Too many systems to manage / integrate | • Build a repeatable, automated process<br>• Save reps time w/ automatic logging<br>• All-in-One Source of truth / system of record, easy integrations<br>• Fill the CRM w/ leads - full inbound value |
| **Sales Leader Larry** | • Not enough leads for sales reps<br>• Difficult to understand how marketing supports sales team goals<br>• Reps struggle to engage prospects in a meaningful way / low connect rates | • Build a repeatable, automated process without reps needing to do anything. Visibility into how reps follow up.<br>• Generate consistent and predictable flow of leads for the sales team<br>• Surface the highest quality leads for reps at all times<br>• Visibility into marketing activities |
| **Sales Rep Alex** | • Too much cold calling<br>• Not enough leads<br>• Struggling to prioritize which leads to cal<br>• Too much time doing admin | • Know exactly which leads to work, and when<br>• Reduce reliance on cold calling and referrals<br>• Know exactly what a lead cares about before you call<br>• Marketing booking meetings on your behalf<br>• Automated CRM admin |
| **Marketing Mary** | • Unclear on health of pipeline -> Lack of understand of lead quality<br>• Sales complains that leads are not good -> Lack of clarity into pipeline<br>• Doesn't know if or how sales is following up<br>• Not enough leads | • Visibility into leads sales works<br>• Healthy working relationship between sales and marketing. When sales asks for a change marketing can make it.<br>• Marketing can measure the impact of their work |
| **Owner Ollie** | • Not enough leads to hit sales goals<br>• Has a website, but doesn't know how to turn it into a sales rep | • Generate consistent, predictable flow of leads<br>• Turn your website into a 24/7 sales machine |

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| What is your prospect trying to accomplish? | Sample Questions |
|---|---|
| CORE CHALLENGES AGENCY'S CAN SOLVE<br><br>● Prospect: "We have a need to organize" (CRM)<br>● Prospect: "We have a need for greater rep productivity" (Sales Free and Sales Pro)<br><br>GENERAL VALUE PROP GUIDANCE<br><br>The way in which agencies discuss CRM and paid sales products will vary depending on which persona you're engaging - Mary, Alex, Larry.<br><br>COMMON PAIN POINTS AND SOUNDBITES<br><br>● *"Our data is **not organized**. We don't have a single system of record that everyone uses." (CRM)*<br><br>● *"I feel like we have **no structure** to our sales process. It's not a repeatable process." (CRM)*<br><br>● *"I lack **insight** into what's working and what's not." (CRM)*<br><br>● *"I feel like my team is **not following up** enough with their leads. Opportunities are slipping through the cracks." (SP)*<br><br>● *"I feel like we could be **more productive**. I want to automate more of the busy work." (SP)*<br><br>● *"I feel like we struggle to **respond** to leads quickly and book **meetings**" (CRM, SP)* | CONNECT CALL GUIDANCE<br><br>● **Understand the company**<br>    ○ *Who do you sell to, what do you sell, how do you sell it -- look for company goals*<br><br>● **Understand the individual within the context of the company**<br>    ○ *Role, how they spend time, why they took a call with you?*<br><br>● **Understand the sales team**<br>    ○ *Team structure - BDR vs. Account Exec?*<br><br>● **Understand their tech stack**<br>    ○ *CRM or sales acceleration software?*<br>    ○ *Are they happy? Challenges?*<br><br>● **Understand the company's sales process**<br>    ○ *How do they find leads, connect, and close?*<br><br>● ***Ask the 'magic' question → "How's that going for you?"*** |