

The Essential Sales Playbook

Helping Sales Close the Deal



bulldog
solutions™
Demand Generation Unleashed



Executive Summary

Gone are the days of Marketing throwing leads “over the wall” to Sales without responsibility or visibility to when, if and how those deals are closed/won or lost. Marketing now has the ability and directive to influence performance throughout the entire funnel, from first contact to close.

If marketers are to be responsible for revenue, it’s important to be very cognizant of what is needed to drive conversions in the middle and at the end of the funnel, not just at the top. Sales support represents a set of tools and practices designed to transfer accumulated knowledge from the marketing organization to the sales team in order to increase the “warmth” of the conversation and improve the likelihood of turning an engagement into an opportunity, and an opportunity into a closed deal.

It’s Marketing’s role to ensure that Sales has the support materials and instructions they need to drive success. This document reviews one key element of sales support: Sales Playbooks. It covers key considerations to building playbooks that ensure Marketing is setting up Sales for success:

- The changing relationship between Marketing and Sales
- Best practices in sales enablement
- Anatomy of a playbook: What it is (and what it *isn't*)
- Beginning the playbook creation process (and who should own it)

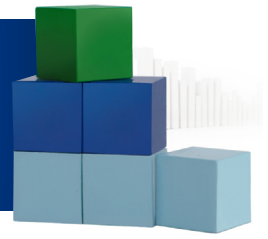


Table of Contents

The Evolving Union of Marketing and Sales	4
Sales Support: The Last Mile	5
Playbooks and the Sales Funnel	6
Anatomy of a Sales Playbook	7
Beginning the Process	9
Conclusion	9



The Evolving Union of Marketing and Sales

As marketing budgets shift toward demand generation and an array of tools, such as customer relationship management (CRM) systems and marketing automation platforms (MAPs), in order to deliver visibility from early engagement all the way through closed deal, a new reality comes into play for marketing departments.

Gone are the days of throwing leads “over the wall” to Sales without responsibility or visibility to when, if and how those deals are closed won or lost. Marketing now has the ability and directive to influence performance throughout the entire funnel, from first contact to close.

Gone are the days of throwing leads “over the wall” to Sales without responsibility or visibility to when, if and how those deals are closed won or lost. Marketing now has the ability and directive to influence performance throughout the entire funnel, from first contact to close.

Thus the traditional chasm between Sales and Marketing is shrinking by necessity—the two departments have to work together, with firm baton handoffs throughout the sales funnel in order to meet revenue goals for which both are now responsible.

This new responsibility is driving organizational changes and new trends such as the role of Chief Revenue Officer or the combination of Sales and Marketing under the same executive. Marketing departments are increasingly being held accountable for Marketing-contributed revenue instead of the traditional metrics such as cost per lead or other ROI calculations that really aren’t tied directly to closed business.

The ability for marketing teams to drive revenue and prove the impact of their activities has opened up new opportunities for influence, as well as a potentially daunting level of accountability.



Sales Support: The Last Mile

Sales support is the “last mile” in the closed/won loop, and arguably it’s often forgotten or slighted by marketing departments, at their peril. If marketers are to be responsible for revenue, it’s important to be very cognizant of this end game.

Sales support represents a set of tools and practices designed to transfer accumulated knowledge from the marketing organization to the sales team in order to increase the “warmth” of the conversation and improve the likelihood of turning an engagement into an opportunity, and an opportunity into a closed deal. It’s Marketing’s role to ensure that Sales has support materials and instructions they need to drive success.



High-performing marketing organizations, illustrated by this benchmark diagram, adhere to best practices in a range of key areas, including Sales Support.

Here are some best practices needed for sales support to make the most impact:

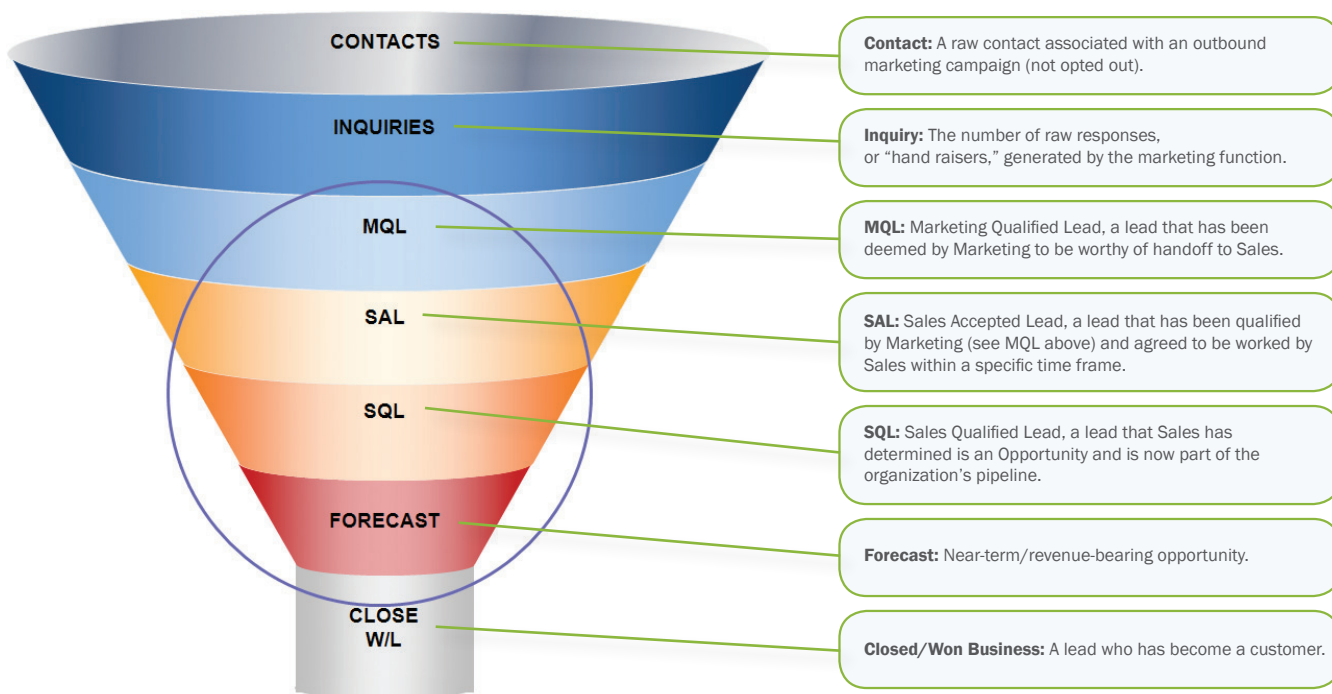
- Marketing provides tools and content to facilitate lead conversion, not just from Inquiries to MQLs, but deep within the funnel.
- Persona-based marketing campaigns translate into “first thoughtful conversations” with Sales; in other words, Sales is reaching out to the right people at the right time with the right messages.
- Calls to action are appropriate to the value of the prospect (for example, a decision maker, likely hard to reach, is offered high-value content such as exclusive research or consultation).
- Campaign briefs clearly explain the objectives, message and assets related to a company, providing an easy “cheat-sheet” that ensures marketing and sales teams are on the same page from start to finish.
- Sales playbooks are highly specific documentation that tells the salesperson what to do, when and how to do it, and why it’s being done, during the transition of leads from Marketing to Sales.



Playbooks and the Sales Funnel

The sales funnel and various stages therein guide Marketing and Sales expectations and activity. Typically, the stages at the top of the funnel are where Marketing spends most of its budget, primarily on lists and leads, with low measurable return. On the other hand, the areas lower in the funnel, those more under the purview of Sales—SALS and SQLs—have a higher likelihood of closing and a higher dollar value, and yet much less effort is spent there by Marketing.

Although sometimes Sales and Marketing are aligned in an overall understanding of the funnel, they're rarely 100% in sync. In fact, each level of the sales funnel warrants some type of instructions, how-to's, assets, lead sources and a clear definition of how opportunities convert or move lower in the funnel. The more valuable the offering, or the deeper in the funnel the opportunity is located, the more information the sales team may need.



The blue circle on the funnel shows where sales playbooks and other sales enablement tools help drive conversion between the stages.



Anatomy of a Sales Playbook

Sales playbooks must be user-friendly, specific and accessible. In a nutshell, they are pieces of documentation that help Sales quickly and easily understand Marketing's efforts and expectations of Sales to follow up on opportunities efficiently. They align sales activity and coaching with the buying cycle and the engagement activities being created by Marketing.

The playbook must be easily digestible; if training is required, playbooks should be the main study guide to help Sales quickly learn new processes or protocols. Nowhere is marketing-speak more of a detriment than in a playbook. Get right to the point if you expect Sales to easily digest and adopt your playbook.

The following are the essential components of a best-practices sales playbook:

1. Program overview

The program overview provides a glance at the big picture. It encourages buy-in and sets context by explaining the purpose of the program and illustrating where it fits into a broader demand-generation context. It may spell out specifics such as target personas or geographic regions, key products and related activities. It may include a snapshot of the big-picture workflow diagram, if applicable.

Among the elements of the overview are:

- Campaign name and objectives
- Details of timing and key milestones, if applicable
- Target audience
- Messaging
- Frequency of communications and/or events
- Calls to action/next steps for both Sales and Marketing
- A very clear understanding of the sales role in the campaign

2. Description of technologies and assets used within the program, and how to use these tools

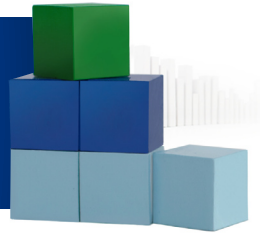
If Sales is being asked to use automated e-mail templates or take specialized action in the CRM system, this should be noted and explained. This may include instructions regarding:

- Automated or template e-mails via a marketing automation platform
- CRM compliance (using certain fields or dropdowns)
- Use of functionality such as real-time notifications or CRM reporting
- How to read results and proactively respond

What Does Not Make a Great Playbook

From our experience working with clients on their sales playbooks, as well as our own, we've discovered a few "don'ts" to add to our list of "do's." A playbook will not be useful or even adopted at all by your sales team if it is filled with marketing-speak with no calls to action or clear direction. In addition, try to stay away from complicated Visio diagrams that require a Master's in Engineering to decipher. Keep it simple, direct and easily digestible.

Final tip to keep in mind while crafting your playbook: Don't attempt to "show" sales "how to sell." They know how to sell. However, it's perfectly okay to show the sales team what resources they have—accessible with just a few clicks—and suggestions on how and when they could use them.



3. FAQ resources

Even the simplest campaigns may bring up questions about templates, additional assets or unusual situations.

The playbook should clearly identify resources such as:

- Frequently updated explanations as questions come in from Sales during the course of the campaign
- Contact information for Sales and Marketing campaign owners

Playbooks can be built in many formats and lengths, depending on your sales team's needs and preferences and the amount of information you need to share with them. Sales playbooks work in PowerPoint, Word documents, even online. In some cases, landing pages are optimal, especially for ongoing campaigns, because you can update them frequently, pointing to ongoing promotions.

Sales playbooks can include simple diagrams and workflows, or much more comprehensive, step-by-step, chapterized instructional brochures. Wherever possible, you want to keep it simple, both in words and graphics. If there are multiple steps or variations on a process, an Excel spreadsheet even works, as long as it's clear and concise.



Wherever possible, keep playbooks simple and clear. This example contains clear, concise text with directions and clean imagery.



Beginning the Process

Who “Owns” the Playbook?

Marketing should lead the charge in the planning and creation of the playbook. Marketing is planning the activities that will engage prospects and should consider the playbook a continuation of that program. That said, there should always be a portion of a campaign budget and timing associated with sharing and collaborating with Sales. This is critical. Ideally, Marketing and Sales should identify a sales team “Friendly” that can help during the planning and throughout the design of the playbook. This person may also act as a coach after the playbook is created, using the designed materials to train sales team members.

In larger organizations, a sales enablement role is built into the company. These resources act as mediators between Marketing and Sales, acting on behalf of Marketing to spread the word and provide instructions to the sales team; and then, from the other side, bringing the sales point of view to the marketing table to share the needs of the sales team.

Getting Started

If starting from scratch on a sales playbook seems overwhelming, it needn't be. A simple, short playbook is more likely to gain Sales adoption. A starter playbook can be as simple as a series of one-page briefs. Get the main points, themes and instructions together in a one-page document that salespeople can easily post on their wall and consume quickly. When they see value, they are more likely to lend an ear and voice during upcoming campaign strategy and planning sessions.

In fact, working through the details of the playbook early in the planning stages of a campaign can be a great exercise for Marketing to vet its message and expectations. If Marketing is unable to communicate clearly how Sales is expected to drive opportunities as a result of a campaign, it will be even more difficult for Sales to understand.

Conclusion

Sales playbooks help Marketing enable Sales to accelerate conversions in the middle and at the end of the sales funnel. They ensure the handoff from Marketing to Sales is synchronized and help Marketing ensure its activities are driving not only top-of-funnel leads, but revenue for which it is increasingly responsible.

About Bulldog Solutions

Bulldog Solutions transforms BtoB marketers' ability to deliver sales-ready prospects to meet business objectives and prove Marketing's impact on sales. We are BtoB demand-generation specialists recognized for our approach by thought leaders in our industry. Bulldog Solutions is headquartered in Austin, Texas. Visit us at www.bulldogsolutions.com and contact us at info@bulldogsolutions.com.

