

Sales Methodology, Sales Process, Sales Guide or Sales Playbook?

By Janet Gregory

Sales effectiveness and sales productivity are critical in today's business world. The question is what will have the most positive impact: sales methodology, sales process, a sales guide or a sales playbook? These significant elements are all inter-related in a successful sales operation.

What does my sales team need ... methodology, process, guidance or a playbook?

A simple answer is that your sales team needs all of them!

- Sales Methodology
- Sales Process
- Sales Guide
- Sales Playbook

Each element is inter-related. It is likely that all four of these significant elements are already at work within your sales organization, some formally and some informally.

Sales methodology provides the fundamental sales approach and terminology when talking about customers. Sales methodology can be singular, provided by one great approach or can be a unique combination that is crafted through the experience of sales leadership. Great sales methodology can come from any number of sources (professional training & books are available), select examples are:

- Complex Selling - Thull
- Customer Centric Selling – Bosworth & Holland
- Dale Carnegie
- Power Base Selling – Holden
- Strategic Selling – Miller & Heiman
- SPIN (Situation, Problem, Implication, Need-Payback) – Rackham
- Target Account Selling

Sales process provides the time-based steps of a sale from initial qualification to proposal to close. A successful sales process parallels a customer's buying process and makes it easy for a customer to evaluate and purchase your offering. Sales process is not one-size-fits-all. There will be many subtle variations based on customer industry, vertical markets, product offering, and offering complexity. Each sales step (or stage) should have a well articulated set of entry and exit criteria as well as objectives and goals. Each sales step should define the resources, expertise, management and other personnel that should be introduced and utilized. A successful sales process is reviewed and updated annually. Most sales process will consist of 5 to 9 steps. Below is a classic example of the company sales process (black lettering) that is (*hopefully*) aligned with a customer buying process (white lettering):



A sales guide provides practical information on competition, positioning and value proposition. Your marketing department is instrumental in developing an effective sales guide. Many companies have successfully implemented a sales WIKI where sales and marketing people can provide current, relevant information. Competitive information needs to include head-to-head competitors, customer alternatives and the inertia of in-place solutions. Positioning can be subtle or dramatic, changing terminology to appeal to specific industries, customer case studies, market data and internal win reports. If the sales team is engaging in heavy discount activity it is typically because your customers are not seeing the unique business value of your offering and are commoditizing it. Value proposition is often a key component of positioning but must also include return on investment. Your ROI should explore not just cost savings but also growth potential. A great turnaround CEO once said, “you cannot save your way to profitability.” In today’s economy, companies are more interested in how your product offering can help them make money. Cost saving solutions alone are insufficient to drive buying decision, customers are looking for solutions that will contribute to their company growth. Additionally, long sales cycles of 12 to 24 months will have a sales guide that also includes account planning format and guidelines that maintain organizational alignment in the long complex sales process.

A sales playbook provides practical best-practice examples of successful communication tools. Communication can be a two-way interactive conversation or one-way, such as email or a voicemail. These tools will include scripts for phone calls, email templates and the elevator pitch. The sales playbook is ever changing with communication tools that support marketing campaigns, seasons, business cycles and special events. Great sales playbooks include qualifying criteria, probing questions, objection handling, FAQs and key selling points. Also find other high impact articles on sales playbooks in the [Resources section](#) of the KickStart Alliance website at www.kickstartall.com.

What is slowing down sales success?

When looking to improve sales effectiveness and sales productivity first consider what problems you are trying to solve or what roadblocks are preventing sales success. Assessing the factors that affect sales success is a complex task. The factors that affect success are both internal and external. Internal factors affect (and are affected by) your company. External factors are those that affect your customers. Below are issues that result from internal and external factors that affect sales. Be selective; check off the issues below that are the major roadblocks to your sales success.

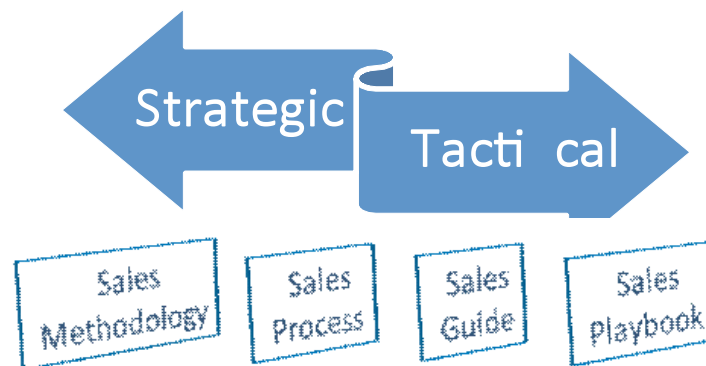
Element	Internal (Company) Issues	External (Customer) Issues
Sales Methodology	<input type="checkbox"/> Internal miscommunication <input type="checkbox"/> Internal misunderstanding <input type="checkbox"/> Account strategy & planning problems <input type="checkbox"/> Forecasting – can’t articulate situation	<input type="checkbox"/> Approach not aligned with customer marketplace or market need <input type="checkbox"/> Buyer does not prioritize your offering into something requiring serious consideration

Sales Process	<input type="checkbox"/> Poor use of SEs & sales support <input type="checkbox"/> Management not used appropriately <input type="checkbox"/> Too many “Lone wolf” sales people <input type="checkbox"/> Forecasting – not sure what’s next	<input type="checkbox"/> Sales process not aligned with the customer buying process <input type="checkbox"/> Buying decision results in no-decisions & “dry-runs”
Sales Guide	<input type="checkbox"/> Poor use of marketing materials <input type="checkbox"/> Too often “blind-sided” by competition <input type="checkbox"/> Can’t keep a long or complex sale alive <input type="checkbox"/> Forecasting – buying priorities are not clear <input type="checkbox"/> High discount activity	<input type="checkbox"/> Customer does not see competitive differentiation <input type="checkbox"/> Buying decision based on price – your offering has been commoditized
Sales Playbook	<input type="checkbox"/> Individuals creating own sales tools <input type="checkbox"/> High variation in individual performance <input type="checkbox"/> Inconsistent customer messages <input type="checkbox"/> Forecasting – lots of activity, few results	<input type="checkbox"/> Customer confusion – value messages are unclear <input type="checkbox"/> Buyer does not prioritize your offering into something requiring a decision

Which element above stands out as slowing down your sales success?

Strategy or Tactics?

Sales methodology, sales process, sales guides and sales playbooks contain both strategy and tactics; they should all be grounded with best practices and day-to-day practices that reinforce their organizational impact. Your assessment of what is slowing down sales success will illuminate whether more strategy or tactics is needed to achieve the sales effectiveness and sale productivity you are striving for.



Strategic elements like sales methodology and sales process are systemic. They are the basis of the company lexicon, how people talk about prospects and customers. The concepts become universally understood within the organization. Terminology is clear when used in forecasting, account planning and account strategy. Sales methodology and sales process provide a common lexicon, approach and stratagem for working with prospects and customers.

Tactical elements like sales guides and sales playbooks are active best-practice handbooks. They are used every day; they change as major internal and external factors change. The approach and tools are shared and result in elevating the success of all individuals on a team. Prospect and customer communications are consistent, relevant and appropriate. Sales guides and sales playbooks provide

action-oriented methods and templates that deliver consistent communication with prospects and customers.

Getting Started

You can start anywhere. Just get started! You may be farther along than you realize.

- ✓ Start with your sales force automation (SFA) system. If you have a working SFA system (like Salesforce.com, Oracle, Netsuite, ACT, Goldmine or others), you will find sales process, some common language (sales methodology) and some shared tools throughout the system.
- ✓ Start with the Sales WIKI, SharePoint, “sales drive” or where ever sales docs are captured. You will find components of a sales guide and sales playbook (hopefully best-practice examples) of sales tools, templates and other materials.
- ✓ Start with Marketing. They have created value statements, tools, collateral and a wealth of information. You will find elements of a sales guide, sales playbook and some methodology. The traditional divide between sales and marketing can be minimized by aligning the work of your marketing team with sales methodology and sales process. Marketing materials included in a sales guide or sales playbook dramatically increases sales access and use.
- ✓ Start with Sales. Interview successful sales team members and find out what’s working for them, what tools they use and how they talk about their accounts. They have sifted through messages, collateral, tools and techniques to find the ones that work. Best-practice tools and techniques provide credibility to methodology, process, guides and playbooks.
- ✓ Start with a KickStart Alliance consultant. We have lots of experience in building sales playbooks and sales guides, as well as documenting sales process and methodology. Having an experienced, objective third party assist also takes the politics out of the process and focuses on outcome, results and improving sales success.

Sales effectiveness and sales productivity are critical in today’s business world. Sales is a process. It is as important to define the sales process as it is to define accounting, manufacturing or customer support process. The elements of methodology, process, guidance and playbook are all inter-related. Each is important. Start by developing the element that will best address the speed bumps or roadblocks that are slowing your sales success.

Janet Gregory is a veteran sales executive and co-founder of KickStart Alliance. For assistance with sales strategy, sales planning, training, sales enablement, compensation or any aspect of sales operations, contact [Janet](#). Janet leads the sales readiness practice at KickStart Alliance. For help in aligning sales & marketing for results contact any member of the [KickStart Alliance team](#).

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