

Sales Playbooks: It's a Whole New Ball Game

Web-based Sales Playbook applications drive efficiency and effectiveness

By Mary Gospe

In my recent article entitled [What is Sales 2.0?](#), I touched on some of the new Web 2.0 applications that are helping take enterprise selling to a new level. These applications include online tools for prospecting, account intelligence and sales operations. And now a common selling tool – the sales playbook – is being transformed by Web 2.0 technology.

What is a Sales Playbook?

Sales playbooks (also sometimes called sales guides or call guides for inside sales teams) are designed to document almost everything a sales rep needs to know to sell successfully. They generally include the following content:

- Company and product background and value proposition
- Target market, buyer personas and pain points
- Competitive positioning
- Messaging tailored to specific market segments and buyer types
- Probing questions with associated features and benefits
- Answers to frequently asked questions (FAQs) and objection-handling tips
- Closing techniques
- Sales process stages and corresponding sales tools
- Internal processes for using the CRM system, qualifying leads, forecasting deals, responding to RFPs, etc.
- Alignment with marketing campaigns (programs, activities and offers)

Sales playbooks help capture a company's sales training methodology and the best practices of their top sales reps. They are a crucial tool in training and ramping new hires (inside, direct and channel) and in helping mid-range reps achieve a new level of performance.

The problem with traditional sales playbooks

Most sales playbooks are written in Word or PowerPoint and are delivered to reps in a sales binder. The trouble with these formats is that after initially reviewing them, reps inevitably revert back to their old habits and the binder gathers dust on the shelf. It is also challenging for sales and marketing leaders to keep the playbooks updated and disseminated.

Enter the world of Web 2.0 Sales Playbooks

Companies like [Kadient](#) and [Playboox](#) are blazing a new path for how sales playbooks are designed and used. These applications can be embedded directly in a CRM system such as Salesforce.com, so that probing questions, sales process checklist items and qualifying criteria are on the screen – guiding the sales rep’s conversation with prospects in real time.

I had the opportunity to sit down with Playboox founder and CEO, recently, and asked him a few questions about Playboox, which is launching in June 2009.

Why did you start Playboox? What problem are you trying to solve?

“This company really started 20 years ago when I began my sales and sales management career at Xerox. I had the good fortune to have received excellent sales and Total Quality Management training and learned early on that the key to sustainable sales success was the ability to define and execute a repeatable sales process. Research has shown that companies that do the best job of defining, executing, analyzing, training and reinforcing their sales processes outperform their competitors across key performance indicators, such as quota attainment and win rates.

Prior to starting Playboox, I was the COO and GM for a division of InfoUSA called YesMail, where we achieved much success signing Fortune 500 marquee name accounts in a fiercely competitive market. We were able to accomplish this because we were better prepared than our competition and very methodical in our approach. I tried to take this methodology and bake it into Salesforce.com, but was only able to develop a series of checklists. I knew there had to be a better way. And that’s what prompted me to start Playboox.”

Describe briefly how Playboox works.

“Playboox is a SaaS (software-as-a-service) application that can be used anywhere there is a relationship-centric repeatable process. It is a platform that makes it easy for sales and marketing managers to define various sales processes and apply their own unique sales methodology and best practices. By associating sales messages, probing questions and check points at each stage of the sales process, best practices are reinforced.

We’ve taken a radically different approach to our design. Sales reps typically want immediate gratification and love competition, so the application uses a game metaphor, is visually appealing and fun to use. The object is to score the most points – up to 100 points per stage - for a given sales opportunity with the premise being that the more points you score the higher the likelihood you win the deal because you will have affected best practices.”



Figure 1: Screen shot of Playbook Deal-Specific Game Plan

What applications does Playbook integrate with?

“Playbook can be used as a standalone system or embedded within Salesforce.com as a custom tab. We will support integration with other CRM systems over time.”

How is Playbook different from Kadiant or other online playbook applications?

“Kadiant is more of a content repository and only provides about 30% of our capabilities. Playbook offers interactive guided selling based on the sales stage and incents best practice and process adoption through the incorporation of tips authoring, scoring and alerts capabilities. Playbook is designed to help reps increase sales call effectiveness by prompting them to ask the right questions and make the right statements at the right time. Moreover, we make it easier than ever for reps to capture, organize and report the account intelligence they gather throughout the sales process for every deal they “playbook”. For sales managers, it provides deal analysis and a degree of visibility into each opportunity that they can’t get from existing SFA systems, which they can use in pipeline review meetings and to prepare for joint account calls with their reps.”

Conclusion

Sales playbooks are an essential tool in arming your sales organization with a proven sales process and training methodology to increase their effectiveness. In today's tough selling environment, where every conversation with a prospect is vital, sales playbooks provide reps a much-needed competitive advantage.

The trouble with traditional document-based playbooks is that they are static and often end up on a shelf or hard drive. Automated playbooks are changing the game. Applications such as Playbox are dynamic and help guide a sales rep's conversations and activities in real time, right from their computer screen.

About the Author

Mary Gospe is principal and co-founder of KickStart Alliance. She helps B2B tech and clean tech companies build and nurture their sales pipelines through integrated marketing campaigns, sales development programs and inside sales operations. She has created numerous sales playbooks for her clients over the years. For more information on sales playbooks (traditional and automated) contact [Mary Gospe](#) at 650.941.8970.