

The 40 Best Sales Playbook

Prepared for Your Company

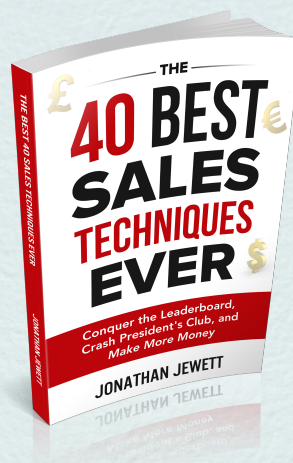


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Rewrite the Rulebook

BRIEF:

Rather than being *reactive* and led by the buyer, salespeople need to be *proactive* and actively look for opportunities to influence and shape the terms of the sale. This can mean defining the buyer's requirements, instructing them on how to evaluate and buy your product, pushing them to think ahead to deployment, and providing resources to help them build a strong business case for purchase.

This technique is most effective when you're working with an unprepared and inexperienced buyer (as many business unit buyers are). In most cases, they'll gladly accept your help, and this enables you to position yourself and your solution as the best answer to their problem.

PREPARATION:

Develop a Customer Starter Kit (CSK) that consists of five resources to get started, and then assess the customer's degree of need for each of these in your Discovery process.

- Requirements List
- Evaluation Plan
- Deployment Roadmap
- ROI Calculator
- Customer Case Studies

Requirements List (RL)

Often created from past RFP responses, the RL is a checklist of the features and functionality that a typical company buying your product *should* be looking for. The Requirements List is heavily weighted towards requirements met by your product, and buyers that adopt your RL to define their own requirements will inevitably reach the conclusion that your product is the one that best meets their needs.

Discovery Questions:

- Have you defined your requirements for this project?
 - If *No*, volunteer to send them the RL. Your requirements will become their requirements.
 - If *Yes*, ask them to share this document with you. It will tell you exactly how you need to sell them.

Evaluation Plan (EP)

The EP is a detailed roadmap to buying your product and presents the key activities that normally occur when a buyer evaluates your product and makes a purchase. These activities can include forming an eval team, defining scope and requirements, identifying preferred vendors, making a selection, developing a business case, and finally making the purchase.

The EP also opens the door to share the other resources in your CSK, and every document you provide enhances your value to the customer and draws you one step closer to the sale. You'll become a full-service vendor that can guide the customer all the way from initial interest to a final purchase.

Discovery Questions

- Have you ever bought solutions like mine before?
 - If *No*, send them the EP and review it with them. It will become the customer's roadmap to evaluating and buying your product.
 - If *Yes*, ask them about their experience, and apply these lessons to your approach to improve your chance of a sale.

Deployment Roadmap (DR)

The DR lays out deployment best practices and the decisions a customer needs to make when they purchase your product. The DR can help you shift the customer's thinking from "*Do I buy?*" to "*How can I be successful?*" Work with your services/implementation team to create the DR and leverage it to get the customer thinking about the future.

Discovery Questions

- Do you have experience deploying a solution like mine?
- Have you considered the various deployment options we have available?
- Would it be helpful to share some of our experiences with other customers and discuss some of the decisions you'll need to make before you buy?

ROI Calculator

The ROI calculator enables the customer enter their own data to produce the speculative return they'll realize by using your product. ROI calculators can be basic or intricate, but they're key for customers needing to create the business case to buy your product.

Discovery Questions

- Does your approval process require you to submit a business case?
- What information needs to be included in your business case?
- What kind of return or benefits are you expecting from my product?

Customer Case Studies

Relevant customer case studies—especially those showing real numbers and ROI—build your credibility and help the customer to comprehend the value and benefits of your solution. Additionally, they can present reference opportunities if the customer requires it.

Worksheet: Rewrite the Rulebook

Customer Name: _____

Requirements List

Customer Requirements defined?

YES

NO

☐☐

- If No, RL provided to customer?

☐☐

- If Yes, RL received from customer?

☐☐

Evaluation Plan

Has the customer bought a similar product before?

YES

NO

☐☐

EP provided to customer?

☐☐

Details of Evaluation Process: _____

Deployment Roadmap

Has the customer deployed a similar solution?

YES

NO

☐☐

DR provided to customer?

☐☐

Guidelines or decisions on deployment: _____

ROI Calculator

Has the customer used the ROI calculator?

YES

NO

☐☐

Results/Value provided by my product: _____

Case Studies provided to customer:

1) _____

2) _____

3) _____

4) _____

Reference required?

YES

NO

☐☐

The Call Blitz

BRIEF:

Call blitzes are intensive, all-day prospecting efforts designed to build pipeline and initiate as many conversations as possible in a short time with potential customers. The best blitzes focus on a single product or message to ensure that pitches are clear and effective.

BLITZ PREP & EXECUTION:

- 1) Training and Materials
 - 1-hour training on product/service that is the focus of the blitz.
 - Sample call scripts and product “cheat” sheets
 - Email templates for follow-up
- 2) Call lists
 - Targeted list of 100-125 prospects
 - Up-to-date phone numbers
- 3) Call scripts
 - 1-2 versions of the pitch; experiment with different messages
 - Pitch can also be left as voicemail and sent as email
- 4) Set goals
 - Set goals for yourself and measure your progress during the day
 - Set clear objectives for each call
- 5) Focus
 - Reschedule meetings; keep your calendar clear for blitz day
 - Make calls in 1-hour blocks of concentrated call activity
 - Take 5-10min for each hour worked; hydrate; stretch your legs
 - Close email, shut your door, and minimize distractions
- 6) Document your activity
 - Take notes in your CRM for each call
 - Track follow-up actions and delegate these for end of day or following day
 - Update your pipeline with new deals
- 7) Award top performers
 - Awards for sales closed, most pipeline generated, most calls made

Worksheet: The Call Blitz

BLITZ CHECKLIST

- Targeted list with 125-150 names and phone numbers
- Call scripts and pitch materials
- Minimize distractions
- Clear calendar
- Close email
- CRM or notepad for notes
- Water

Date: _____

Blitz Topic/Focus: _____

My Blitz Goals:

- 1) _____
- 2) _____
- 3) _____

My Pitch:

Results: Pipeline Created

- 1) _____
- 2) _____
- 3) _____
- 4) _____
- 5) _____
- 6) _____

Follow-up Actions:

- 1) _____
- 2) _____
- 3) _____
- 4) _____
- 5) _____
- 6) _____

The Big Audacious Proposal

BRIEF:

The Big Audacious Proposal (BAP) is all about thinking big, being bold, and trying to grow your deal by adopting a more strategic approach. Don't be content with small transactions—the BAP mindset requires you to be creative and present a strategic vision that will help the customer to see the bigger picture and make a larger investment in your product or service. *Always ask for more than you think you can get, because sometimes you do get it.*

STEPS TO EXECUTE:

1) How you buy influences the type of seller you are, so examine your own buyer profile

- Are you a Bold, Cautious or Impulsive buyer?
- How does your buyer profile affect your attitudes about selling?
- What's stopping you from being bolder in your sales role?

2) Look for the following conditions, as these are most favorable for a BAP

- Customer is thinking too small; smaller transaction won't meet their needs.
- Well-aligned with corporate strategic priorities.
- Sponsor has vision and ability to see the bigger picture.
- Your product will deliver a compelling ROI.
- Economic conditions are right, i.e. customer can make a bigger investment.

3) Brainstorm new ideas to create the BAP

- Tie your product into a strategic goal/initiative.
- Think company-wide, not departmental.
- Look for ways to grow the deal.
- Develop a solid business case and ROI.
- Ask yourself: *Why should the customer make this bigger investment with you?*

4) Solicit feedback and prepare to pitch the executive

- Recruit your coach/sponsor to help you prepare the presentation to the execution.
- Share with your extended team for ideas and perspective.
- Develop a vision backed up by a solid business case.
- Keep your Plan B handy: Close the transaction if you can't close the BAP.

5) Make your pitch

- Face-to-face is better than remote.
- Pitch the executive and sell the vision.
- You need to believe in the BAP and bring passion and enthusiasm to your pitch.

Worksheet: The Big Audacious Proposal

Client Name: _____

Name of coach/sponsor: _____

Executive sponsor: _____

Current Deal (amount, problem being solved, fit with strategic goals)

Top Client Initiatives/Strategic Priorities

- 1) _____
- 2) _____
- 3) _____

My ideas to grow this deal and make it strategic

- 1) _____
- 2) _____
- 3) _____

Sponsor feedback

- 1) _____
- 2) _____
- 3) _____

Action Plan: Vision, ROI, and how I'll pitch the executive

Plan to Close with a Close Plan

BRIEF:

Once you've received a verbal commitment from the customer, the real work begins. The Close Plan (CP) is your roadmap through lengthy and complex procurement processes, and will help both you and the customer to ensure that every step, date, and person involved is defined and held accountable. You can forecast your deal with confidence and move with speed towards the final objective: obtaining a signed contract.

CLOSE PLAN FORMATS & ELEMENTS:

CPs are living documents, and should be created in either MS Word or PowerPoint (not email). The letter format is the most popular, but project plan formats will also work. The following elements need to be included in every close plan:

1) Restatement of business goals

- What important issues is the customer hoping to address with your product?

2) Tasks to be completed

- Detailed list of every step that needs to be completed in the procurement process

3) Owners

- Assign an owner to every task and make them accountable for its completion

4) Due Dates

- Target date(s) for each task to be completed

5) Sponsors

- Main points of contact at your company and the customer
- Sponsors own the overall process and are responsible for keeping the process on track, holding their task owners accountable, and resolving any issues

CLOSE PLAN BENEFITS:

- | | |
|------------------------------|--|
| • Better intelligence | • Mutual agreement and commitment |
| • Better deal predictability | • Accountability on both sides |
| • Better resource planning | • Roadmap to close |
| • Risk mitigation | • Present yourself as an organized and efficient partner |

Sample Close Plan

DATE
CUSTOMER NAME
ADDRESS

Dear Tim,

< RESTATEMENT OF BUSINESS GOALS >

I'm excited to work with you and get you started with the Lingotek translation management platform. As we discussed, this solution will streamline your translation process and enable a global rollout of your new training materials.

You've indicated that you'd like to begin this work by **September 1**, and we'll need to work towards a signed contract by **July 1** to ensure that this date is met. You've identified the following as the remaining steps in your process:

< TASKS, OWNERS, DUE DATES >

- 1) Approval by the executive committee. Due date: 5/15/17
 - Tim will coordinate with the committee and own approvals.
- 2) Legal review & approval. Due date: 6/5/17
 - Customer: Tim and Ann Hulecki (counsel)
 - Lingotek: Jonathan and David Sansone (counsel)
- 3) IT and Security signoff. Due date: 6/10/17
 - Customer: Bill Purdy, CTO
 - Lingotek: Jonathan and Philippe Pelayrus (IT Mgr)
- 4) Contract signature. Due date: 6/25/17
 - Customer: Lisa Wright (SVP Products)
 - Lingotek: Rob Vandenberg (CEO)

< SPONSORS >

As agreed, Tim and Jonathan will have overall responsibility to ensure that the process stays on schedule and tasks are completed by the stated due dates. A weekly call will also be scheduled to monitor our progress and address any issues that may arise.

Tim, the Lingotek team is excited to work with you and make sure that your global training rollout is a total success. Thank you again for your business.

Best regards,
Jonathan

Go Social: LinkedIn & Twitter

LINKEDIN CHECKLIST:

Get Started

- Set up account
- Complete Education profile
- Add Skills and Endorsements
- Add LI profile to business cards and email signature
- Complete Experience profile
- Ask for Recommendations
- Join Groups
- Add professional photo
- Follow high-profile people

Networking

- Connect with current colleagues
- Connect with classmates
- Ask connections for warm introductions to prospects
- Connect with past colleagues
- Connect with current prospects

Advanced

- Post topics in groups you've joined
- Write an article and publish on *LI Pulse*
- Ask your connections for warm referrals to prospects
- Comment on existing discussions
- Share articles related to your business or industry

TWITTER CHECKLIST:

Get Started

- Set up Twitter account
- Follow your company, colleagues, and influencers
- Pick relevant #hashtags and begin using them regularly
- Write profile, add photo, set background
- Write your first tweet

Advanced

- Set aside 15min daily for Twitter; post and share content
- Continue to grow your network
- Direct message your prospects to begin conversations
- Make use of direct messaging