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How to Build a Sales Playbook



How to build a Sales playbook

Map Sales Process to Buying Process

- Document both the buying and sales process by stage
- Identify the exit criteria (buyer action) for each
- Identify tactical actions to progress the buyer into the next phase of the buying process

Conduct a Content Audit

- Create an Expert Panel of Sales and Marketing peers
- Perform an audit of all sales collateral and sales tools
- Associate content to the appropriate stages/product/buyer action

Create Sales Tools

- Identify gaps in collateral and tools that need to be created
- Work with your marketing peers to develop a content creation strategy
- Sales tools and job aides should be internal facing, while collateral is external facing

Create Playbook

- Marry the content with tactical execution & process
- Ensure all of the content is mapped to the appropriate stage and buyer action
- The goal of the playbook is to progress the deal from one stage to the next

Iterate

- Content and process will continue to change
- Be agile in your approach to the process
- Identify gaps and close them in the playbook

Sales Playbooks – Step 1

Step 1 – Map Buyer Process to Sales Process

Objective: Ensure you have an understanding of the buying behavior of your key buyer personas. Marry the sales process to the buyer process.

Process:

- Document both the buying and sales process by stage
- Identify the exit criteria (buyer action) for each
- Identify tactical actions to progress the buyer into the next phase of the buying process



Sales Playbooks – Step 3

Step 3 – Create Sales Tools

Objective: To create tools for both internal consumption (sales tools) and external consumption (collateral) that are mapped to the sales process to progress deals.

Process:

- Identify gaps in collateral and tools that need to be created
- Work with your marketing peers to develop a content creation strategy
- Sales tools and job aides should be internal facing, while collateral is external facing



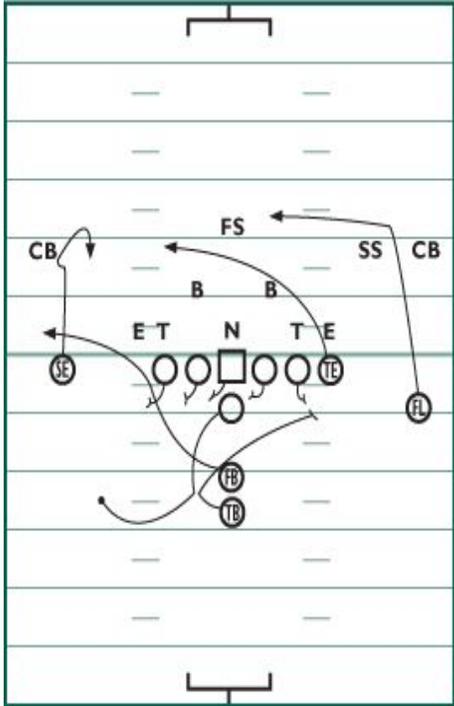
Sales Playbooks – Step 4

Step 4 – Create Playbook

Objective: Design the tactical plan on how to execute the sales process, aided by the tools and collateral.

Process:

- Marry the content with tactical execution & process
- Ensure all of the content is mapped to the appropriate stage and buyer action
- The goal of the playbook is to progress the deal from one stage to the next



Sales Playbooks – Step 5

Step 5 – Iterate

Objective: To have a fluid and agile approach to design, feedback and creation. The playbook will evolve over time.

Process:

- Recognize that content and process will continue to change
- Be agile in your approach to the process
- Identify gaps and close them in the playbook
- Seek regular interaction and feedback from the user community via surveys, expert panels, reviews, etc.



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