

[LOGO]

SALES PLAYBOOK

-[COMPANY NAME] -



Welcome!

Yea! You downloaded your Sales Playbook Template! As they say, "If you fail to plan, you plan to _____" This template, once completed, is going to guide you through exactly what to say step-by-step, word-for-word, through the sales process and make selling easy, authentic, predictable and repeatable so you can be unstoppable! I can't wait to watch your business grow!

How to use this Sales Playbook Template

What to write: Each page of this template has tips and hints of what to include. It's divided into eleven sections (solopreneurs may not need all sections). There is also a spot for "Additional Resources." Some ideas of what you can use this spot for are: links to press articles, demos, recordings of presentations or lead generation scripts, ongoing learning, books, blogs, etc. Don't forget to visit jpmpartners.com/blog for free training and ideas on how to fill specific parts of this playbook.

Creating a Sales Playbook is A LOT of work. But it is work worth the investment. You do not have to complete this in one sitting!

Editing and saving your playbook: Just open the Google Doc [HERE](#), sign in, select "File" and "Make a Copy" and start typing! Save your work, and then once you're finished, share it with your team (view only) or download it as a pdf. Send it off to the printer and it makes it official. Replace my logo with yours in the header and on cover page.

Remember that this sales playbook is meant to be fluid. There will always be changes in the market, your product, competition and your presentation, especially as you and your company grow!

- Jess



Was this super helpful? Super confusing? Don't feel unstoppable just yet? Have no fear, Jess is here! I'll be back with more info on how you can fill this Sales Playbook and make selling easy, authentic, predictable and repeatable so you can be unstoppable! In the meantime, please share this with your friends and colleagues who need their own Sales Playbook Template!

Template.magicsalesplaybook.com



YOU DESERVE TO DO MORE
HAPPY DANCES!

Section One: Introduction

Welcome! How to use this playbook....

Use this area to create a welcome message and instructions for your Sales Playbook

Mission Statement: The "why" behind what we do

Use this area to paste your mission statement. Salespeople must have a deep belief in the product and why it was developed will inspire them to help get it to the market.

About our Company:

This would be similar to the text you have on your website on the "About page"

Meet the Founders:

Include a brief bio of the founders of your company, no matter how young you are. Being able to connect with the people who created this vision will help your salespeople get excited about selling.

Hierarchy:

This section is to include a list or a graph of the hierarchy within the organization from the salesperson up. This helps them understand who they are reporting to, what the chain of command is, and how the company is structured. This is a good time to list who to contact for specific problems.

Additional resources:

Use this area to list resources for further reading and understanding. You can include sales training website, books, podcasts, etc., that will enhance their experience.

Section Two: The Market

The problem:

All great companies start by solving a problem. Describe the problem your prospective clients are experiencing.

The solution:

Describe how your product or service solves this problem for the client. This is a very brief description.

Market Definition:

Outline the demographics of your market. Where are they located? What size company or family is it? What revenue/income?

Ideal Customer Profile:

Within the target market, there is a specific person for whom your product solves a problem and/or who will be making the purchasing decision on this product. Create a profile of this person. Go deep into not only the facts, but the feelings involved when your client has this problem. Are they frustrated? Overwhelmed? Scared? Angry?

Competition: (Direct)

Include a list of your direct competitors. Direct competitors solve a similar problem for the same market with a similar solution. Include their website and a brief description of their advantages and disadvantages here. A chart is helpful to compare product features.

Competitor website	Price	Feature 2	Feature 3	Feature 4

(click tab in the last cell to add additional rows)

Competitors (indirect)

It's important to remember indirect competitors when understanding your client's viewpoint. Indirect competitors solve the same problem for the same market, but in a different way. For instance, an indirect competitor of permanent life insurance would be term life insurance as well as savings

accounts, other types of investments, and even putting money under a mattress. An indirect competitors to a cloud based CRM would be a non-cloud based CRM, spreadsheets, and rolodexes. This is especially important for startup with innovative products. There is no such thing as no competition. How are people currently dealing with this problem? That is the competition, even if it's not an ideal solution.

Additional Resources:

List here some more resources about your target market, your competitions, the problem and the solution.

Section Three: Strategy

Sales Strategy Overview:

Describe below a high level overview on how you plan to address the market and obtain new customers.

Sales Targets and Benchmarks:

Include here some of the company's benchmark's to measure success. What is the company's next goal? What is the 5 year goal, etc? This don't have to just be revenue based, there can be other ways of measuring progress (# of users, # of downloads, etc.)

Sales Funnel:

Include a visual of your sales funnel

Sales Funnel Definitions:

Include a description of each phase of the sales funnel and how to identify what phase your clients are in.

Additional Resources:

Include some additional resources here that will help your salesperson understand your marketing strategy.

Section Four: sMarketing

sMarketing is Smart Marketing or The Salesperson's role in marketing or lead generation

Elevator Pitch:

Include your 60 second elevator pitch that will get people interested and excited about what you do.

sMarketing Strategy #1:

WORKFLOW:

Include the process of how to generate a lead from this marketing strategy. This should take a person to the point of interest. Once they are interested, you will go directly into the Appointment Setting Script to qualify and set a time to speak further. This is meant to get them to "tell me more," or "That sounds interesting."

SCRIPTS:

Include here exactly what to say or write for each step of the workflow in this strategy. Your salespeople will make it their own over time, but they need a definitive framework that works so they can see results as quickly as possible.

sMarketing Strategy #2:

WORKFLOW:

SCRIPTS:

sMarketing Strategy #3:

WORKFLOW:

SCRIPTS:

Additional Resources:

Include additional resources and training on how to develop skills to generate more leads out of your sMarketing strategies.

Section Five: Appointment Setting

Appointment Setting Flow Chart:

Include a visual representation of the flow chart to set a qualified appointment:

Appointment Setting Script:

Include the exact script to set a qualified appointment as well as a checklist of what information needs to be gathered prior to the appointment. Make sure the checklist includes Urgency, Budget, Decision Makers, and Problem.

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Appointment Setting Objections:

List here the common objections received when trying to set an appointment and how to best overcome them.

Appointment Setting Next Steps:

If you set a qualified appointment, please follow these next steps:

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If you do not set a qualified appointment, please follow these next steps:

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Additional Resources:

Include additional resources and training materials on how to set qualified appointments. You can also include links to recordings of someone setting a qualified appointment.

Section Six: Closing the Sale

What follows in this section is the process we use to move a prospect from "curious" to "client" during our sales presentation. Please follow each step in order and don't move on to the next step until the goal of the previous step is completed.

Step 1: Develop a Relationship

GOAL: ESTABLISH TRUST AND RAPPORT WITH THE CLIENT.

Here are some ways you can establish a relationship with your prospective client:

IF YOUR CLIENT DOES NOT SHOW UP FOR THE APPOINTMENT:

When a client doesn't attend a scheduled meeting, it doesn't mean you will not make the sale. But how you handle it is crucial for it to end up in your favor. Here's what to do if a client doesn't show up for a scheduled appointment:

Step 2: Qualify

GOAL: MAKE SURE THE CLIENT IS QUALIFIED FOR OUR PRODUCT AND HAS THE NEED, URGENCY, BUDGET AND THE DECISION MAKERS ARE PRESENT TO MAKE A DECISION TODAY TO MOVE FORWARD IN THE SALES PROCESS.

Here are the qualifying questions that must be answered before moving on:

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IF YOU FIND THE CLIENT IS NOT QUALIFIED HERE'S WHAT TO DO:

Step 3: Pre-Close

GOAL: GET THE CLIENT'S AGREEMENT AND SET EXPECTATIONS FOR THE MEETING THAT A DECISION OF WHETHER OR NOT TO MOVE FORWARD IN THE SALES PROCESS WILL BE MADE AT THE END OF THE MEETING.

Below is the script we use to pre-close the client.

IF YOUR CLIENT IS UNABLE TO MAKE A DECISION AT THE END OF THE MEETING:

Step 4: Presentation

GOAL: OUTLINE THE PRODUCTS AND SERVICES WE OFFER TO SOLVE THEIR PROBLEM WHILE ADDRESSING THE EMOTIONAL AND LOGICAL REASONS OUR CUSTOMERS BUY.

Below is an outline of the slides of our presentation and the script that goes along with each.

Step 5: Close

GOAL: ASK THE CLIENT TO MAKE A DECISION

Here is the script we use to close the sale and some tips to follow:

Step 6: Overcoming Objections

GOAL: SATISFY ANY OBJECTIONS THE CLIENT HAS FOR MOVING FORWARD.

Objections can happen at any point in the sales process. Here is a list of the common objections we hear from our clients and how to best overcome them, as well as a strategy to overcome any objection:

Step 7: Crystallize

GOAL: PREVENT BUYER'S REMORSE AND MAKE THE SALE AS HARD AS DIAMONDS.

Here is what we say in order to crystallize the sale:

Step 8: Referrals

GOAL: GIVE AND RECEIVE REFERRALS FROM OUR CLIENT.

We take this step whether or not we have closed the sale. Here is how we ask for referrals from our clients and make sure we replace this sale or non-sale with new prospects:

Next Steps:

PLEASE COMPLETE THE FOLLOWING STEPS WHEN YOU CLOSE A SALE:

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PLEASE COMPLETE THE FOLLOWING STEPS IF YOU DO NOT CLOSE THE SALE:

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-
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Additional Resources:

Include additional resources to increase closing skills. Include presentation skills, recordings of presentations, how to overcome objections, and how to increase emotional intelligence to develop relationships.

Section Seven: Post-Sale

Retention:

Once you have closed the sale, here are best practices on how to make sure the client is happy with the product:

Renewals:

Here is the workflow we follow when the customer is up for renewal:

Additional Resources:

Include additional resources here to help increase retention and renewals.

Section Eight: CRM

Logging in:

Here are the instructions for logging into the CRM:

Mobile and Remote Access:

Here is how you can access the CRM remotely and via mobile:

Troubleshooting:

Please use the following contact details for support on using the CRM

Entering a new record:

Here is how you enter a new record:

Include written instructions here as well as screen shots

Field Explanations:

Here is an explanation of the different fields in your CRM:

General Instructions for use:

Here is how we need you to utilize the CRM:

Additional Resources:

Include a screen recording of how to use certain features in the CRM and a link to the provider's troubleshooting and training pages.

Section Nine: Accountability and Rewards

Performance Expectations:

Below is an outline of your performance expectations and how we will address expectations that aren't met.

Reporting:

Below is a description of the sales reports you are required to submit, their due dates, and how to create them, along with ongoing metrics you should be tracking.

Compensation Plan:

Below is an outline on how you are compensated.

Bonuses, Rewards and Long Term Incentives:

Below is a list of bonuses, rewards and long term incentives we have in place to acknowledge your contribution to the company.

Additional Resources:

Include links to the sales agreement, compensation schedule and terms of employment here.

Section Ten: Support

We're here to support you!

Here is the chain and contact details we would like you to follow when you need support in various areas:

Training Resources:

Here is a list of training resources we've found especially useful:

Section Eleven: Conclusion

Thank you...

We know you have a choice when it comes to what company you want to represent....