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SALES DEVELOPMENT PLAYBOOK



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“Sell the problem you solve, NOT the product.”

Dave Schools



“People will learn from you, listen to you, love you, and buy from you when they feel understood, not when they understand you”

Dean Graziosi



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Introduction

In short, your ability to achieve your sales objectives are dependent upon three main variables.

1. **Right Person**
2. **Right Message**
3. **Right Time**

Identifying the right people to talk to and starting conversations with them, otherwise known as prospecting, is the most important and resource-intensive step of the sales process.

Prospecting isn't a one-and-done activity...it's a series of activities that make up your sales campaign. As the precision on the aforementioned three variables improves, so does the predictability of outcomes for your sales campaign: the number of people you can expect to move from being potential customers to paying customers in your sales pipeline.

The first step to running a successful sales campaign is to create a campaign plan. This **Sales Development Playbook** is your template for creating that plan so you can **achieve your campaign goals faster and more consistently**.



1 CAMPAIGN OVERVIEW

The key to a high-performing prospecting campaign is **FOCUS**:
Pick one single product (or program), resolve one gap in the sales pipeline, and engage one targeted audience.

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Welcome to
{Account Name}

Industry
Insert Industry Name

Category
Insert Category

Total Headcount
Number

Sales Employees
Number

Why Do We Exist
Insert text

How We Do It
Insert Text

What We Do
Insert Text

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WHAT IS
{Category}?

Insert Definition

Competitor **Analysis**

Companies	Description	Star Rating	Market Segments	Entry Price
{Company Name}		NA ...	NA ...	NA ...
Competitor 1	NA ...	NA ...	NA ...	NA ...
Competitor 2	NA ...	NA ...	NA ...	NA ...

Competitor **Analysis**

Companies	Description	Star Rating	Market Segments	Entry Price
Competitor 3		NA ...	NA ...	NA ...
Competitor 4	NA ...	NA ...	NA ...	NA ...
Competitor 5	NA ...	NA ...	NA ...	NA ...

Industries {Company Name}

Currently works with



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THE PRODUCT

Focus on ONE product or service you currently sell. This can be a best seller or one that needs improvement.

Product
Overview

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What's the name of the product/service?

...

Who's the primary decision maker for the product/service?

...

What does it help users achieve?

....

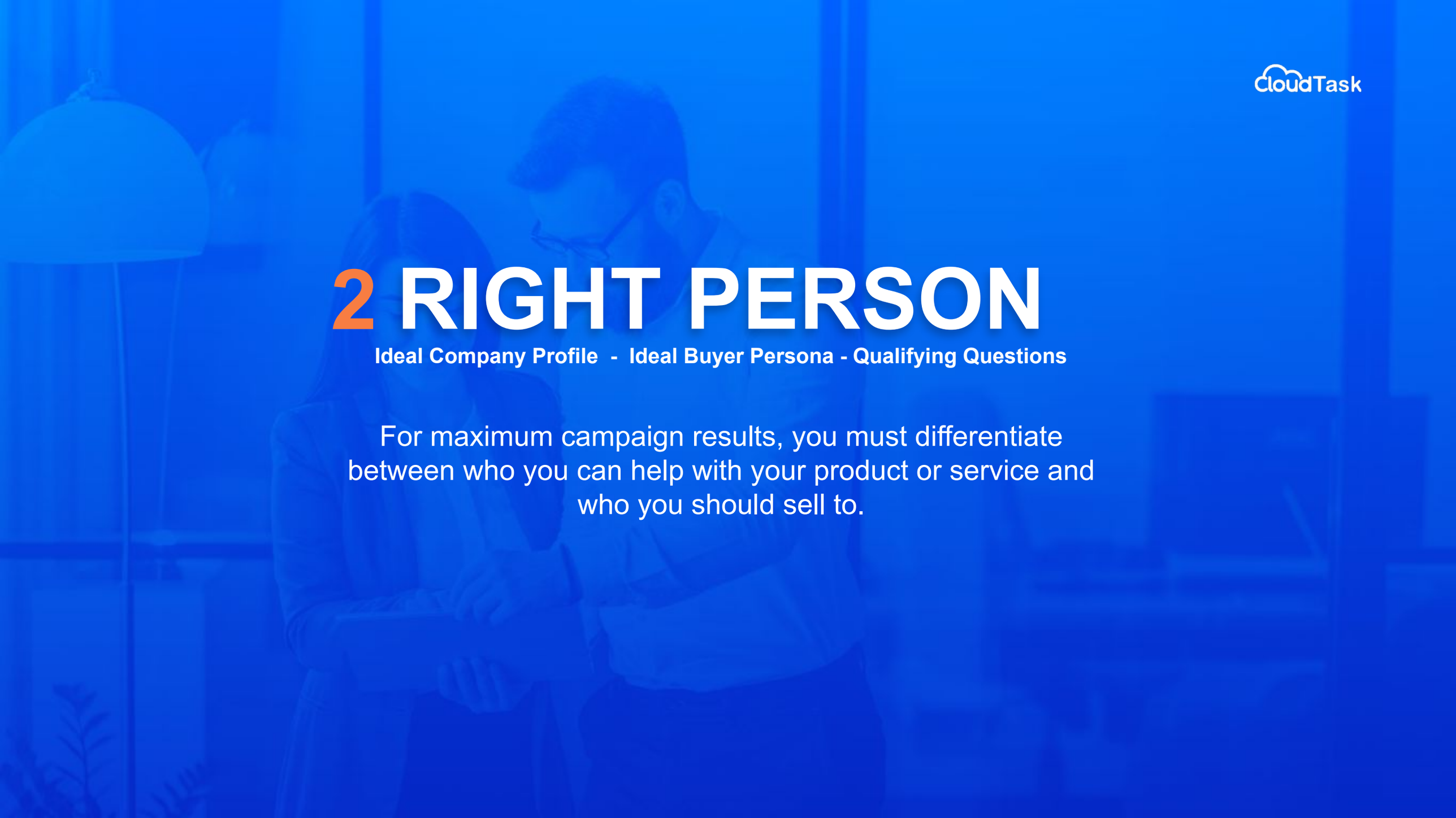
What does it help users avoid?

...

Top 3 Differentiating Features

1. Example, [so that]..., [which means]...
2. Example, [so that]..., [which means]...
3. Example, [so that]..., [which means]...

Rewards and Recognition



2 RIGHT PERSON

Ideal Company Profile - Ideal Buyer Persona - Qualifying Questions

For maximum campaign results, you must differentiate between who you can help with your product or service and who you should sell to.

Ideal Company

Profile

Industry
Industry Name here

Category
Category Name here

Total Headcount
Insert Number

Departmental Headcount*
Department Name: N/A
Headcount: N/A

Location
Insert Location

Ownership Structure
...

Company Stage
...



John Smith - (Function) Leaders

As a (function) leader when I am (situation) I want to (motivation) so I can (desired outcome).

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Common Titles

-

Performance Objectives

-

Performance Gaps

-

Performance Bridge

Qualifying **Questions**

Questions to validate that the company the buyer is not only interested, but also that they have the ability to move from “opportunity” to “deal won” if the next sales conversations go well.

Theme	Question	Question
Buying Window	Insert Question	Insert Question
Budgetary Window	Insert Question	Insert Question
Contract Window	Insert Question	Insert Question
	Insert Question	Insert Question
	Insert Question	Insert Question

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3 RIGHT MESSAGE

Phone Script - Email Script - Social Script

Your prospecting message must be quick, simple, direct and relevant. You must clearly answer the question: What's in it for them?

Key Message **Elements**

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Performance Objective	Performance Gap	Performance Bridge

Email Script

Don’t know how to write a Sales Email? Click here

Best practices for sales emails...

Write an engaging subject line. This is one of the most important factors in an email and it determines whether the email is opened or not. The shorter the better.

Intrigue your prospect with the preview text. Before a person opens an email they get to read the preview text and it’s up to you, to stand out and attract their attention.

I**nclude a CTA in every email.** Don’t exaggerate, you only need one CTA per email. This adds to the purpose of the email prompting your prospect to take action over what they read.

Avoid getting spammed. Some words simply activate spam radars and will send your email to the trash. This blog from Hubspot will help you out in this matter.

Cut to the chase. Prospects prefer to read short and punchy emails instead of long and boring ones.

New Message

To: Cc Bcc

Subject Line: {Company Name} + {Account Name}

{Prospect Name},

I’m {Rep Name} and came across your {Company Name} website. I love the fact that {insert what you like from their website}. I also found out that you are currently looking for CSRs to grow your customer support team.

We’ve been helping {Insert Job title} like yourself facing issues when hiring and training CSRs. What are you currently doing to overcome this challenge?

This case study shows how other companies in your same industry deal with this sort of problem to avoid churn.

Best regards,
{Rep Name}

Social Script

Social is best known for the interactions and relationships that you can build worldwide.

Best Practices...

Beef up your profile. This guide has all the tips you need to set up your LinkedIn profile.

- Connect with those that are relevant to your industry. Reach out to the right audience.

- Focus on educating, not on selling. Build rapport before you start talking about your company and what you do.

- Share relevant content like articles, videos, blogs, images, etc. that are applicable to your prospects.

- Like and comment your prospect's posts - answering common questions they might have in their industry.

- Create the right content that gives answers to your audience - provide solutions to their problems.

- Tag strategically. Mention those who can draw attention to your post.

- Be consistent with your posts. Aim to post at least 1 or 2 times a week and remember to keep your content fresh.

Hi {Prospect Name}, thanks for connecting.

It's my pleasure.

I can relate to the article you posted about … {insert topic}. I really liked {insert what you liked about the post}. {Ask an open ended question to build a conversation}.

Thanks, I appreciate it. {Prospect's answer}...

Awesome...{Send Vidyard}

Phone Script

Best Practices...

Know your prospect. Do your research before you you call your prospect and prepare yourself by learning as much as you can from them and the company they work for. Find out what their needs and challenges are and be ready to talk about how you can help them overcome those problems.

Embrace rejection. You're not going to close 100% of your prospects. You need to focus on your goals and KPIs and not let objections take you down. Learn from those prospects that refuse to the appointment and if they are kind enough, as why they're not willing to buy.

Find a calling schedule that works. Prospects are most likely to answer towards lunchtime and the end of the day. Although, that doesn't apply to every buyer persona, you can increase your connect rate. When things get slow on the phone, use your time to plan, prep, and tweak your script.

Leave effective voicemails. Don't be salesy. Keep it under 20 seconds. Use an upbeat, friendly, and energetic tone of voice. Insert some urgency and always mention their name.

Hi! It's Bob from ShareVault! How are you?

I'm okay. What can I do for you?

I talk to sales leaders like you every day and many of them tell me that improving the productivity of their sales teams is a top priority...

...the problem is that lead quality and quantity challenges often hold them back.

Is that a challenge for you at your company?

Yes

Then we might be able to help! We help sales leaders overcome that challenge by running strategic prospecting campaigns through sales development teams. Would you like to learn more about how it works?

Tell me more ...

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4 RIGHT TIME

Sales Cadence - Call Outcomes - Objection Handling - FAQ's - Handoff Process

Cross-channel cadences can run to get a message in front of the contact to inform them of how we can help them overcome their challenge and achieve their goal.



Your **Sales Cadence** is the sequence of “touches” designed to engage prospects across various communication channels, in order to start conversations that move the right people through the sales process. Constantly evaluate your channels, number of touches, and wait time between touches until you find the optimal cadence for your campaign.

Cadence Screenshot

Channels **Used**

Number of **Touches:** ---

Messaging **Blueprint**

Call Outcome **Descriptions**

A call outcome describes the outcome of a call. Call dispositions give sales managers and reps valuable intelligence they can use to optimize their team's phone performance and sales process. Best of all, properly implemented call dispositions are actually huge time savers, as they act as a one-click shorthand for call outcomes, and save reps lots of time in manual note-taking.

Call Outcome	Definition
Busy	You connected with your target lead but you did not get to "pitch"
Pitched	When you connect with the the prospect and get to talk about the reason for your call. You talk about how CloudTask can help with a challenge.
Left Live Message	When you leave a message with a gatekeeper. This person then in turn says they will let the prospect know that you called.
Left Voicemail	When you leave a voicemail to a prospect.
No Answer	When you do not leave a voicemail or live message because you already have so you hang up without leaving another.
Wrong Number	When you call and learn that the contact is not actually at the number you called
...	...
...	...

Objection **Handling**

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Objections occur when the customer has a gap but doesn't seem to want to learn more about the solution

Objection	Question Clarify	Overcome with Value	Check and move on
Listen closely to identify the objection and don't interrupt. Rephrase the objection...	Use questions to isolate the objection and clarify the TRUE objection before you attempt to handle it.	Address the objection using felt/found, a benefit or a story.	Confirm you answered their concerns Push forward to next steps or a close.

Frequently Asked **Questions**

These provide answers to a list of typical questions that prospects might ask.

FAQ	Answer

Handoff **Process**

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After you've successfully booked an appointment, follow the process to hand off all the necessary information to the Account Executive. This information may include: Interactions, prospect information and key data like special requests or interests.

1	---
2	---
3	---
4	---
5	---
6	---
7	---
8	---
9	---
10	---
11	---
12	---

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5 REFERENCES

Directory - Resources - Additional Resources

Contact **Directory**

Prospecting Team

{Name} - Senior Sales Manager

{Name} - Sales Manager

{Name} - Sales Leader

{Name} - Sales Development Representative

{Name} - Sales Development Representative

{Name} - Sales Development Representative

{Name} - Sales Development Representative

Closing Team

Name - CEO

Name - VP Sales Inside

Name - VP Sales Enablement

Name - Sr Sales Enablement Consultant/ Sr Trainer

Name - Vendor Manager (Direct POC)

Resources

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Content Repository	This is used to document and categorize the content that we have and ensure we reach the right persona with the right content at the right time within our sales strategy.
Messaging Blueprint	This is the document where you will find the emails that correlate with the sales workflow. Each template relates to a compelling event within the workflow. After collecting the information regarding the success of the emails sent through our CRM, these emails may be amended and A/B tested wherever necessary until we gain the intended results we anticipate.
Glossary	This is used to clarify meanings of ambiguous or technical words within the industry. It helps us to understand and embody the language and voice necessary and use the correct terminology when interacting with prospects.
Sales Cadence	This is the document we use to visualize the entire sales strategy in a more concise manner. We create this to create clarity and make it easier for all members to identify the steps to take and the possible outcomes that will arise when engaging with our prospective customers.
Coaching Plan	This is the spreadsheet used to analyze and document the strengths and weaknesses of sales reps. The account manager works closely with each individual, highlighting their areas of opportunity and implementing coaching activities to improve upon them. Progress is recorded and success stories are noted when the development goals set have been reached.

Additional **Resources**

Books	--- --- ---
Magazines	--- --- ---
Blogs/Websites	--- --- ---
Conferences	--- --- ---
Thought Leaders	--- --- ---
Youtube Channels	--- --- ---
Podcasts	--- --- ---
Online Communities /Forums	
Professional Organizations	--- --- ---
---	--- --- ---
---	--- --- ---



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