## Anatomy of a Sales PlayBook

| Preparing to Sell                        |                               |                                 |  |                                     |                                      |  |  |  |                                      |                                  |  |
|--|-------------------------------|---------------------------------|--|-------------------------------------|--------------------------------------|--|--|--|--------------------------------------|----------------------------------|--|
| How Do We Manage Sales?                  |                               |                                 | How Do We Sell?                        |                                     |                                      | Why Buy Anything?                      |  |  | Why Buy<br>Ours?                     |                                  | Why Buy<br>More?                           |
| Sales<br>Analysis                        | Sales<br>Planning             | Sales Mgmt                      | Sales<br>Process                       | Sales / Mktg<br>Infra-<br>structure | Right Rep -<br>Fast Ramp             | Precall<br>Research                    | Initial<br>Contact                       | Qualifying                             | Solution<br>Presentation             | Propose,<br>Negotiate &<br>Close | Sales &<br>Service<br>Teamwork             |
| Win-Loss-<br>Stall Analysis              | Target Market<br>Plan         | Pipeline<br>Management          | Field Sales<br>Process                 | Build<br>Prospect<br>Universe       | Right Rep<br>Profile                 | Domain 101                             | Inbound Lead<br>Playbook                 | Initial<br>Presentation /<br>Follow-up | Solution<br>Presentations            | Proposals                        | Customer<br>Welcome Letter                 |
| Lead-Close<br>Waterfall<br>Metrics       | Sales Plan                    | Lead<br>Waterfall<br>Management | Inside Sales<br>Process                | Ongoing<br>Sales<br>Training        | Interview<br>Approach /<br>Quesitons | Linked-In                              | Outbound<br>Led Gen<br>Pitch Kit         | Master Demo<br>Script                  | Pricers /<br>Quoters                 | Reference<br>Calls               | Service<br>Configuration<br>Questionnairre |
| Sales Model -<br>Productivity<br>Targets | Comp Plan                     | Forecast<br>Accuracy            | Cross-selling<br>Process               | Role-Play<br>System<br>Loaded       | New Rep<br>Checklist                 | Yahoo<br>Finance                       | Company /<br>Solution Story              | Positioning vs<br>Competition          | Analyst<br>Frameworks                | Statement of<br>Work             | Handoff<br>Meeting<br>Agenda               |
|  | Lead Gen<br>Plan              | Rep<br>Productivity<br>Report   | Lead-to-<br>Opportunity<br>Process     | CRM<br>Configuration                | Training<br>Bootcamp<br>Agenda       | Industry<br>Reports                    | Customer<br>Stories                      | Value<br>Calculator                    | Industry Best<br>Practice<br>Metrics | Master<br>Agreement              | Go-Live<br>Timeline                        |
|  | Customer<br>Expansion<br>Plan | Sales Kickoff<br>Agendas        | Evaluation<br>Process                  | CRM<br>Integrated w/<br>Playbook    | First 90 Day<br>Expectations         | Industry<br>Benchmarks                 | Vertical<br>Market<br>Guides             | 3rd party<br>Metrics                   | Pilot vs. Full<br>Deployment         | Negotiation<br>Strategies        | Implementation<br>Success<br>Stories       |
|  | First 90 Day<br>Plan          | Sales<br>Meeting<br>Agendas     | Forecast<br>Process                    | CRM<br>Adoption                     | Interactive<br>Training              | Hoovers .<br>OneSource,<br>Inside View | Winability<br>Scorecard                  | Solution<br>Presentation<br>Surveys    | Customer<br>Success<br>Metrics       | Win-Loss<br>Reports              | Usage Reports                              |
|  | Territory Plan                | E-Staff<br>Formats              | Reference<br>Process                   | Tool Tutorials                      | Story Deck                           | Analyst Call<br>Transcripts            | SPIN / Sales<br>Ready<br>Questioning     | Evaluation<br>Plan                     | Competitive<br>Silver Bullets        |                                  | Customer<br>Success<br>Monitoring          |
|  | Account Plan                  | Board<br>Meeting<br>Formats     | Integrated<br>Appt. Setting<br>Process | Marketing<br>Automation<br>System   | Role-Play<br>Selling<br>Stories      | Industry /<br>Competitor<br>Sites      | Objection<br>Handling                    | Coaching<br>Your Coach<br>Emails       | Detailed ROIs                        |                                  | Client Survey                              |
|  | Opportunity<br>Plan           |                                 |  | Cutomer List<br>by Industry         |                                      |  | Title Specific<br>Call / Email<br>Guides | Case Studies                           | Prospect<br>Facing<br>RoadMap        |                                  | Rep Re-<br>Engagement<br>Triggers          |
|  | Call Plan                     |                                 |  | Company<br>Contact List             |                                      |  |  |  | Close Plan                           |                                  |  |

