Building Sales
“Playbooks”

Situations and tactical actions for Sales readiness
Objectives: Sales Playbooks

- What’s and where used
- How to build
- How to maintain and expand
A “Playbook” for Sales?

Sports team analogy

• Each player on the squad has their role
• Execution in sync leads to the “win”
• “practice” builds muscle memory
Where the analogy differs

Sports = rigidly adhered, no deviations

Business Playbook

• Not a step-by-step guide
• Should influence but not dictate actions
• Responses should reflect situational particulars
“Teams” in business...

...where “players” (employees) execute their job positions successfully

- What defines a winning play?
- Who scouts the competition?
- What gear do we bring to the game?
- What exercises will train us to win?
Uses

- New hire orientation
- Ongoing sales training
- Sales call preparation
- Counter competitive tactics
- Key account planning
What’s inside each “Play”

Situation

Objective

Unique Business Value

Compelling Event

Strategic Considerations

Tactics
Situation

Summary description of scenario, from customer/prospects POV

- “First contact, you’re an alien being...”
- “I’ve got the budget blues...”
- “Gatekeeper...”
- “Lost trust...”
Objective

Your focus and desired outcome for this next meeting

• “Turn the suspect into a prospect...”
• “Discovery: learn about this company...”
• “Dispel notion that our associates are ‘defective’”
• “Win commitment for first placements...”
Unique Business Value

What specific/measurable business values will we deliver

- “experience with this industry...”
- “workforce skills training and job prep”
- “encourages temp-to-hire...”
- “all the headaches of recruiting, payroll, healthcare, ...”
Unique Business Value, 
*Drill-down*

- What is the **specific** or **measureable** business result that we will deliver?
- How does the customer define value? How will they measure it?
- How have we quantified this value in the customers’ terms?
- Has the customer confirmed their understanding of the value we will deliver?
- How does this value differentiate us from our competitors?
Compelling Event

Why does/should the prospect have to buy, now?

- “seasonal demand needs be met…”
- “new contract/expansion objectives”
- “risk of delays or lagging production”
- “sudden loss of key personnel”
- “no internal resource to hire/recruit/interview…”
Compelling Event, 
*drill-down*

- Why does the customer *have* to act?
- What is the deadline for the customer to make a decision?
- What are the *consequences* if this project is delayed?
- What is *payback* if the project is completed on time?
- What will be the *measurable impact* on the customer’s business?
Strategic Consideration

Background: what biz issues are in play?

- “new competitor in their market”
- “recent acquisition”
- “good quarter / bad quarter”
- “new management team”
- “new product mix”
Tactics

Specific actions to consider in moving the prospect towards your Objective

- “counter the competitors’ claims”
- “probe for mismatches in offers”
- “give our internal champion detailed talking points”
- “objectively establish root cause understanding of issue”
- “schedule exec-to-exec biz review”
Tactics: Why We Buy

1. Increase revenues
2. Decrease cost
3. Mitigate risk
Tactics Hint:

Principles of Selling

#1: Look at value from the customer's perspective

#2: Sell to the highest decision-maker possible

#3: Quantify your value proposition*

* Remember similar comment from Bea Boccalandro!
Selling as a “Challenger”

“Challengers win because they recognize the customer’s urgent need to learn something, not to buy something.”
Selling as a “Challenger”

- **Teach** for differentiation
- **Tailor** for the right message to the right person
- **Take Control** of the sale and press the customer
Secret Sauce?
Four rules govern...

1. **Lead to your unique strengths**
2. **Challenge customers’ assumptions**
3. **Share alternatives about how to make money, save money, or mitigate risks**
4. **Repeat across other customers with similar needs**
“Tension” = valuable

Credit to Bay Group International, “Situational Sales Negotiation"
Tactics: Toolbox can include...

- Testimonials / Case Studies
- References
- News / Trends (relevant)
- Tour and customer visit(s)
- Business review (exec to exec)
- Leverage: who can influence?
- Discovery: who’s who and what’s what

- Other?
Personify the Play

“persona” experience

• Fictional character created as archetype for the situation
• Embodied with goals, desires, limitations of real-life expected contacts
9. National Contract Blow-off: “Sorry, but we’ve got a national contract.”

<table>
<thead>
<tr>
<th>Situation:</th>
<th>Tactics:</th>
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<tbody>
<tr>
<td>• Large company, more than likely not headquartered locally.</td>
<td>• Clarify what roles and exact services the national vendor is providing.</td>
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<tr>
<td>• HR or representatives from Procurement claim that a major (competitor)</td>
<td>Understand what pricing and terms are established. Detail all costs,</td>
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<tr>
<td>vendor has a national contract for all temp labor solutions.</td>
<td>including productivity and quality costs incurred by working with</td>
</tr>
<tr>
<td>•</td>
<td>remote/national supplier.</td>
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<tr>
<td>Objective:</td>
<td>• Test for satisfaction:</td>
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<tr>
<td>• Create opportunity for local exception.</td>
<td>o “Are the contracted services wholly satisfying all the needs</td>
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<tr>
<td>• Demonstrate value of local labor sourcing relationship.</td>
<td>and requirements here?”</td>
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<tr>
<td>•</td>
<td>o “Are your performance results with this solution meeting your</td>
</tr>
<tr>
<td>Your Unique Business Value:</td>
<td>expectations?”</td>
</tr>
<tr>
<td>• DePaul excels in understanding the particular requirements of needed</td>
<td>o “Where does this current process cause frustration?”</td>
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<tr>
<td>jobs that are specific to particular (regional) operations.</td>
<td>• Pursue detailed (local) understanding: what special needs does this</td>
</tr>
<tr>
<td>• As a local provider, DePaul is likely to be more adept at matching</td>
<td>local operation have? (with respect to worker training, job role,</td>
</tr>
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<td>quality associates with specific local needs and conditions.</td>
<td>workplace environment, etc).</td>
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<tr>
<td>• DePaul will respond to operational issues quickly and with priority.</td>
<td>• Provide examples and testimonials to local leadership who may need</td>
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<tr>
<td>•</td>
<td>coaching or encouragement to effectively seek approval for a local</td>
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<td></td>
<td>Compelling Event:</td>
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<tr>
<td>• What particular needs (locally) require special attention? Where is</td>
<td>administrators to ensure compelling value proposition.</td>
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<td>local sourcing and service responsiveness an absolute priority?</td>
<td>•</td>
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<td></td>
<td>Strategic Reflections:</td>
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<tr>
<td>• Local managers may feel disenfranchised or un-empowered to seek</td>
<td>•</td>
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<tr>
<td>exceptions to “corporate mandates”; you may need to help them build</td>
<td>•</td>
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<tr>
<td>the business case why a DePaul solution provides better value overall.</td>
<td>•</td>
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<tr>
<td>• Challenge customer perceptions and assumptions: why have they always</td>
<td>•</td>
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<tr>
<td>done it this way? What are their competitors doing now?</td>
<td>•</td>
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6. Entrenched Competitor: "I don't need another supplier."

**Situation:**
- Prospect already engages with DePaul competitor for temp labor, and is reluctant to add a second source.

**Objective:**
- Create opportunity for DePaul to serve as second-source provider, or address additional opportunities
- Establish importance (to business) of multiple-source solution.

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<td>- DePaul’s recruiting net reaches an especially broad population, gaining access to new populations of worker candidates beyond competitors.</td>
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<tr>
<td>- DePaul’s special efforts to optimally match customer needs with specific worker abilities delivers unique quality and performance benefits</td>
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<td>- Test how fully the current provider satisfies all needs and expectations.</td>
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<td>- What’s happening in the business that will grow, reduce, or change staffing needs?</td>
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<td>- While “sole source” lock-in customer relations are desirable from the supplier’s viewpoint, senior management at the customer will value the reduced risk if multiple solutions for staffing are secured.</td>
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| - Introduce risks of depending upon single source:
  - “Forced to accept all workers who are sent over...” |
  - “Dependence upon one supplier to meet peak demand...” |
  - “Lack of competitive alternatives/comparisons is poor procurement practice.” |
| - Drive DePaul differentiation:
  - “More attentive qualification of associates to position requirements.” |
  - “Superior service relationship.” |
  - “HOW program and Hayden: we develop and maintain skillsets in our associates.” |
| - Demonstrate willingness to partner with competitor, to collectively ensure speed and quality of placements. |
| - Seek to understand additional roles for which temp work may be appropriate, and for which present supplier may not be serving. |
All: What “Plays” are most relevant?

What **Objective** do we desire?

What **Unique Biz Value** do we bring?

What’s their **Compelling Event**?

Strategic considerations?

**Tactics** to Win:
Darwinian Principles Apply

Playbooks are living, breathing creatures
• Monitor usage
• Measure impact
• Refine activities, content and messaging

How much effort to create?
• Don’t over-think
• Basic plays, first
What “plays” do we need?
Recap

Sales Playbooks

☑️ What’s and where used
☑️ How to build
☑️ How to maintain and expand