

Sell to Scale: Build Your SalesPlaybook in 20 Steps



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Sales Playbook

This whitepaper provides you with a step-by-step guide how you can build your own SalesPlaybook from scratch in 20 actionable steps within weeks to help you hit Product-Market-Fit and scale up sales faster without hiring expensive sales reps in 5 phases:

1

Master The Fundamentals

- Establish Sales House Rules
- Craft Your Sales Story
- Sharpen Your Business Model

2

Validate Your Market

- Define Target Market
- Sharpen Target Customer Profile
- Define Market Validation Approach
- Understand The Buyer Journey

3

Setup Your Success

- Create OKRs & Operations Plan
- Setup Your CRM
- Get Your Sales Unit Economics Right

4

Move From 0 To Signed Offer

- Invest Into Discovery & Qualification
- Validate Messaging
- Structure Your Sales Process
- Determine The "Right" Price
- Close The Deal

5

Build A Great Sales Team

- Reflect Your Hiring Situation
- Write Your Sales Position Contracts
- Hire For Attitude
- Find & Win Great Candidates
- Onboard New Hires Faster, Better

Wrapping It Up

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MASTER THE FUNDAMENTALS

Many founders ask first which CRM to choose, how to automate lead scoring, scale sales operations and similar "advanced skills". But tackling advanced skills without a solid foundation is often futile like it is to build a 10-story house on soft ground. So let's start with the fundamentals.



1. Establish Sales House Rules

Establishing simple "Sales House Rules" from the start has often drastic effects on shortening sales cycle time and increasing conversion. But much more, they help you establish a high-impact, high-integrity sales culture in your startup from Day 1.

Here are 9 proven ones, but feel free to adapt these and craft your own as you see fit:

- | | |
|---|---|
| 1. Ego Is The Enemy: | Leave your ego at the door, focus on the customer |
| 2. Listen Actively: | Genuinely care and be mentally 100% present |
| 3. Customer Problem First: | Take the solution off the plate |
| 4. Target, Tailor, Take Control: | Make it easy to understand, evaluate and buy |
| 5. Date In - Date Out: | Make sure you follow-up and stay in control |
| 6. Never Go Back: | Do your homework well, but then always advance |
| 7. Quid Pro Quo: | Do not give something crucial for nothing in return |
| 8. Value Before Price: | Discuss costs only once the benefit is fully clear |
| 9. Be Helpful: | Help where you can - without reciprocity in mind |

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2. Craft Your Sales Story

Stories work. Because we are human beings with emotions, senses and a vivid imagination and not computational business case machines. Many startups fail to tell a compelling story and rather provide more of a feature catalog of their capabilities.

Take these components as a guide on how to craft a compelling story:

- 1. Problem (Why):** What problem do you solve? Why does the problem still exist?
- 2. Solution (What):** What do you achieve for the customer?
- 3. Buyer (Who):** Who needs you for what reasons? What's in for the CxO?
- 4. Objections (Resolve):** Why do customers not buy you? How do you resolve objections?
- 5. Testimonials (Trust):** How can you build trust early on without unnecessary PoCs?
- 6. Risk Reversal:** How can you reduce risk for customers ?
- 7. Differentiator (How):** What is your "Secret Sauce", your competitive advantage?

3. Sharpen Your Business Model

Ensure you have at least assumptions for all components of your business model in place.



Make use of the Lean Canvas as an actionable checklist and visualization of your business model:

- 1. Problem:** Solve a problem that is current, relevant, urgent
- 2. Customer Segments:** Describe your Target Customer Profile
- 3. Unique Value Proposition:** The primary reason a prospect should buy from you
- 4. Solution:** What you can achieve for the customer and how
- 5. Channels:** How you are finding and communicating your customer
- 6. Revenue Streams:** How you price your business
- 7. Cost Structure:** Your costs to run your business
- 8. Key Metrics:** The quantification if and how successful you are

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VALIDATE YOUR MARKET

4. Define Target Market

Your technology and even solution can often be applied to countless different industries, company sizes, geographies and even use cases. It is however critical for your success to especially in your early stages focus on a niche that is as sharply defined and repeatable as possible. You should therefore Qualify, Quantify and Specify the attractiveness of the target market.



5. Sharpen Target Customer Profile

There are 2 parts on sharpening your target customer profile in that order as you need to understand both a customer's organisational and human perspective to sell successfully:

Role-Based:

What roles you need to convince to successfully close a deal

Persona-Based:

What type of human beings are typically covering these roles

6. Define Market Validation Approach

The key thing for you as an early-stage startup is to have a **SMART** sales strategy in place that enables you to validate your market quickly, inexpensively and data-driven. That means whatever you set out to do is written down in a way that is **SMART**: **S**pecific, **M**easurable, **A**chievable, **R**elevant, and **T**ime-bound. Even if work in progress, you should strive to do this for all areas of your sales strategy and especially for the sales channels you actively validate.



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7. Understand The Buyer Journey

"Don't sell to customers, let them buy from you" might sound strange to traditional "ABC (Always Be Closing) sales people. It is however crucial to understand where a prospect is on his/her buyer journey and therefore mindset to select a suitable selling style.

A simple mental model to think about is by answering these 3 questions on awareness:

- **Problem Awareness:** Does the prospect have the problem you are solving? And if yes, is the prospect aware the problem exists and is relevant and urgent to solve?
- **Solution Awareness:** Is the prospect aware of the available solutions to tackle the discussed problem? How does the prospect think about these solutions?
- **Collaboration Awareness:** Is the prospect evaluating or already working with you?



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SETUP YOUR SUCCESS

8. Create Sales OKRs & Operations Plan

Make sure to write down what you want to achieve in sales for your company to keep everybody aligned on priorities and progress made. A method commonly used for this early-on in (then) "startups" such as Google, LinkedIn and Uber are OKRs (Objectives & Key Results). If you are a tool geek feel free to use an OKR SaaS offering, but a Google Sheet does work fine in the beginning.



9. Setup Your CRM

Having no working CRM has these several negative impacts for your Sales & Marketing, but also these potentials, so set this up lean and cost-efficient, but early-on:

- **Enable Scalability:** More robust, scalable setup to enable growth
- **Increase Effectiveness:** Higher workforce effectiveness due to reduced efforts
- **Save Efforts:** Less manual work frees up resources for strategic sales



10. Get Your Sales Unit Economics Right

"Sales is a numbers game". You probably hear that on a weekly basis, but it is true. To be predictably and sustainably successful, you need to know your numbers, understand why they are that way and how you can positively influence them.

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MOVE FROM 0 TO SIGNED OFFER



11. Invest Into Discovery & Qualification

Yes, you can do cold email campaigns, performance marketing and sending out generic PowerPoint presentations. If your goal is to create brand awareness or you know really, really well what messaging resonates with your carefully selected target group - awesome. Carefully prepared and executed 1:1 prospecting ("Spearing") typically pays off because the person you are approaching feels respected, personally approached and important.

12. Validate Messaging

There are a magnitude of sales channels how you can validate your messaging by setting up a scalable outbound prospecting approach.



Before tackling paid advertising and other digital marketing channels, I however recommend to generate & prospect very specific leads by following this approach:

1. Identify potential leads via a digital solution such as LinkedIn Sales Navigator
2. Gather structured information via a data enrichment solution
3. Add leads to your CRM
4. Reach out to via Email Sequences, 1:1 messages or other mechanisms

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13. Structure Your Sales Process

Take control of the sales process and become a decision architect to convert interested prospects into paying customers.

This happens more often, more predictably if you structure your sales process along these components:

- 1. Probability:** How many leads/opportunities per stage convert into customers
- 2. Outcome:** What needs to happen to move forward towards a signed offer
- 3. Tasks & Channel:** Steps to do for the desired outcomes and which channels to use
- 4. Qualification:** Define when "you are done" to move forward

14. Determine The "Right" Price

There is no such thing as the scientifically right price. If no prospect pays what you ask for, it is probably too high. If no prospect asks you for options how to get a lower price, it is probably too high.

So as an early stage startup, pricing only works by taking assumptions, validating them with real customers, learning quickly and adapting your market offering to give your customers a better ROI.



15. Close The Deal

How to better negotiate is probably worth an Accelerator offering on its own, but even more key to successfully accelerate your sales.

Here are a few core principles to start with:

- 1. Separate the people from the problem
- 2. Focus on interests rather than positions
- 3. Generate a variety of options before settling on an agreement
- 4. Insist that the agreement be based on objective criteria



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BUILD A GREAT SALES TEAM

16. Reflect Your Hiring Situation

Up to now, the Co-Founder & CEO typically does everything herself. This means no formal job descriptions, documentation or other role-related sales assets exist. But bringing even experienced people on board and expecting them to ramp-up to full capacity within less than 4-6 months under these circumstances is typically illusionary. This is why you need Sales Position Contracts. Position Contracts are job descriptions that are independent if covered by a full-time employee, a partner, but initially a Co-Founder.



17. Write Your Sales Position Contracts

Here are 3 profiles to recruit for, with the recommendation to start with junior people:

Sales Development Representative (CHF 60-90k): Get young, hungry, resilient people you can then up-skill to senior positions

Account Executive (CHF 120-200k): Get still hungry, but experienced sales people. Ideally with domain expertise in your industry, area of work and/or technological focus.

VP Sales (CHF 150-300k): Get them proactively if you identify awesome profiles on the market. If it works out, that person can get your startup to the next digit in revenues. If it does not, that person can ruin your external reputation, but also your internal culture. While burning through a lot of funds along the way.

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18. Hire For Attitude

A study tracked 20'000 new hires over 3 years and saw 46% of them fail within 18 months. Only 11% were due to the above 3 areas. 89% of them failed due to a lack of coachability, emotional intelligence, motivation and temperament - so in short Attitude. Hire for Attitude.

19. Find & Win Great Candidates

"Inbound recruiting channels" such as LinkedIn, your company career portal, online job portals or aggregators work. But if you are hunting for scarce talent such as senior sales people in Switzerland, these people are often not actively looking for a job. Which is why employee referrals, actively cultivating your network or even working with a specialized sales recruiter can make sense.

20. Onboard New Hires Faster, Better

"Sales Reps take 4-6 months to fully get up to speed."

This statement is quite frankly unacceptable because of these reasons:

- ▶ Time is money in a startup so you need to accelerate employee onboarding where you can and
- ▶ It is simply not true as I am convinced this can be achieved 2-3x faster to get new hires to full productivity within 1-3 months with the right assets and processes in place



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WRAPPING IT UP

So let's recap the 20 steps to build your own SalesPlaybook from scratch in 20 actionable steps within weeks to help you hit Product-Market-Fit and scale up sales faster without hiring expensive sales reps:

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Build A Great Sales Team

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19. Find & Win Great Candidates
20. Onboard New Hires Faster, Better

Now I wish you all the best for your success to build your business.

If you have any questions on the above please book a call here:

<https://thesalesplaybook.io/quiz>

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