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Class 3
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Class 1

Hello! Hello! Hello!
Welcome, everyone!
Hi there!
Hello! I love the waves. Good morning! Good afternoon. Hi!
How is everyone today?
Very well,
thank you very good.

Got some thumbs up. I love it. Thank you so much for joining us for our very first session of creating and implementing a sales playbook that sticks. We're so happy You're here
all right. We'll get started here momentarily. Would love to see where everyone's calling in from. So feel free to put it in the chat,
and if you're able to come on camera we would also love to see your faces.
We've got Amsterdam, Oslo, Phoenix,
Denver, Los Angeles. Look at this London, Austria. Wow! We have an international crew today. Absolutely love it.
We've been looking forward to this for a while. Taylor Haven't. We
Yeah. Hello, everybody. I'm: I'm very excited for this. So so great to see so many faces here. Um, so many places
right? This is incredible.
Or Lynn,
New York.
Yeah, this is wonderful. Just letting everybody else get settled before we get started. Before I introduce our remarkable speaker today, it's going to be a fun session and a fast three weeks.
Alright?
Okay? Well, for those of you who don't know me. I'm Taliesin and I'll be your host throughout this course before I introduce our speaker today. You heard from Taylor there momentarily. I wanted to go over a few housekeeping items. One of our values at pavilion is that we choose to come from kindness, so please be mindful of that, as we partake on this adventure together. Um! If this is your first time with us at Pavilion University Welcome, and if you're back again for more, we're so happy to have
mit ctl, and I have you um in order to receive your certification for this course. We do ask for you to either attend, live, or watch back all the session recordings from class during our three weeks together, one hundred and fifty.
In addition. Everything shared today, and in future sessions will be uploaded to the shevo, the recordings, presentation decks, and even a weekly survey that we would love your feedback on um. It's an immense help to see what is working well, and areas that we can improve upon for future iterations. Of this course. Um, and i'm also here, if you have any questions throughout. Um, and really looking forward to this course all right. So now for the fun staff and what you've been waiting for. I am thrilled to introduce our presenter
and creator of creating and implementing a sales playbook that sticks Taylor Davis Taylor is a lead sales strategy consultant at Scaled, and also an executive member at our very own pavilion. We're so excited to have you here. Welcome, Taylor,
great to see everybody here. Thank you so much for all of those who reached out in in advance of this course. Um, i'm really excited about what we're presenting today. Um, it's something I've been uh implementing and doing things and learning the

hard way for years, so i'm excited to share some of those lessons with you. Um! And we have some great takeaways throughout the course. So
thank you all for joining, and uh and thank those I see Gary and some other folks in here um for for letting me know. Uh, you know. Hey, this is what's most important for you and what you're looking to take away from the course. So um looking forward to your feedback and making sure this is uh a great great course for everybody. Thank you.
Fantastic, All right. Do we want to get started? Yeah, let's do it all right. Um cool. So i'm going to share my screen hopefully. It works uh looks all right for everybody here and uh everybody. See my screen
hopefully and tell us, and you can hear me. Okay, uh Mike's good and hot. Um great. So
creating and implementing a sales playbook that actually sticks um from some of the feedback early on. From everybody. I understand that, uh the biggest part that everybody was excited about was the sticking part. Um, so. Um, that's that's also what makes me excited about this course. I've uh again learned the hard way, and what doesn't stick, and and I've made plenty of what I thought to be
just amazing playbooks that uh didn't get uh used Well, right um! So excited to share what these things are for you today. Um, we're going to kind of really start with an overview. Um, But I want to kind of walk through the all three sessions here for you. Um!
As there's so much material, so many kind of tips and tricks that I want to lay on you. Uh. We're kind of break that up throughout the course. So session one uh today we're going to be defining Why, what's the Why behind playbooks, right? What goes into making them effective, getting smart about how and when to apply that, and then gaining internal stakeholder by-in right session two next Thursday will really dig into how to roll these out, how to actually have them be used by your team
drive meaningful results and results that not only achieve your objectives, but make you look good, too. That's important. Um! And we can cover like really details on Why, actually, playbooks fail right setting you up for success, focusing on driver and customer value, aligning those metrics and results prioritizing team needs in your rollout. And what I consider most important in that is designing for usability in your actual sales team member practice
right?
Um session three uh on the fifteenth, I think. Uh, we're gonna dig deeper into what i'm calling future proofing your playbooks. Um, you know we we wrestle with the term here recession proofing as that's uh something people are wrestling with right now. Um, I think that that applies. But really it's about future proofing, ongoing. Um. So this will be more about making your playbooks flexible and adaptable to market conditions. Um, how to adjust messaging to buyer personers
uh new buying behaviors, et cetera. Um. Creating sales champions. How do you sell to create sales champions within your customers using playbooks Um, and then

getting your teams really aligned. Revops is a huge operation right now with uh, It's a great movement that we have going on in organizations, but getting marketing and Cs and all your teams in lock stuff, so that you have a sales engine that can deliver premium buying experiences.
So those are our three sessions. Um
uh today we're going to cover uh again a big overview. But it's really, I think, foundational here. Um! So some of this will be kind of a remind you, you know, refresher for you that have already built playbooks and have them going. Um! Some of this, and and hopefully, that's some new kind of material for you, too. Um, but otherwise we're gonna use. Look at my framework on how I implement sales, playbooks uh, and what I've learned in that, and it's kind of got five big pillars.
Um! So we'll look at Why, sales paybooks are important. Uh and then when to implement them, how to add new sections how to align them really strategically with your objectives, so that you receive maximum results. Um! And then what's going into those? There's so much that can go into a playbook right?
What really needs to go into it? Um! How you should be thinking about gaining by in and uh managing those expectations. Uh, we'll wrap this whole session today uh with a template. Um! So we're going to be able to give that to you through uh through pavilion here. Um after the session, along with today's recording um, and it'll be a template on that five pillar framework on what I use, and I hope you can find that useful, too
sound good,
awesome. I'll see some thumbs up. Um, Thanks. Y'all let's uh let's dig in here
so
a little bit about me. Um.
I don't know how many you're familiar with John Barrows, but he's a a another kind of sales Google that I really respect um. And you know There's always this kind of talk about science of sales, the art of sales, you know. Kind of what camp are you in, or something?
I'm a musician like uh been a musician since uh since my early childhood. Um! So the idea of being an artist in sales is always resonate with me. Um! I also have my own way of doing things. Um, my clients and my partners. Uh they know that about me right? Um! And when it comes to sales archetypes like, Who are you on that scale? I'm like off the charts, Lone Wolf. Right? Uh I love to live over in the artist land and get kind of out of the box
on how we do things. Um! But what I've learned is that even the greatest artists work with parameters when they create right. Um! Starting with a blank sheet of paper that's actually a parameter in itself, is contained Um writers restrict by word, counts and syllables, musicians, song forms and corns and instruments. Right visual artists they're controlled. Their parameter is their canvas sometimes, or their choice of materials.

All those are parameters in the same form, and they can help establish consistency and repeatability in their art form.
So playbooks, I see, is very much like that. They are the they help you guide those parameters. It is the science of sales spilled out like that hypothesis. Right? Um more than they restrict. I think that they will help your team find and express their own special sauce in sales, and we can all benefit from that better performer.
Um!
As we get started. I want to do a quick poll here. So Talies, and if I'm i'm not exactly sure how these work. But hopefully you're seeing some kind of pop up here. How many of you? Okay, good. So I just launched the poll for everyone. How many of you already use playbooks in your business? A. Yes,
be no, or see unsure. I'll give everyone about ten more seconds, and then we can share the results for the group.
I'm going to take this as well. Um, I I promise you. You know, if you will be be honest in it. We're not looking at Who didn't use a playbook or hasn't um No judgments here. Um, It's more about
really want to know what kind of level we are speaking to, and hopefully, we can getting curtail our information better for you, Fantastic. So i'm going to share the results right now for everyone
awesome. So a solid fifty percent are already using playbooks. That's great. Um, I'm: i'm the unsure. I'm guessing you maybe have a playbook, but it's probably hiding in somewhere in the Dumpster um, and that's okay, too. Um, I found I pulled many out of that Um, so great good good to see here. This is um,
I guess what I expected. But um uh good to see what we're getting into, and how we can kind of speak to this. So I think this today's session for those who have not built a playbook and are unsure about it. I think uh this is gonna be uh some really good foundational information to help you build great playbooks moving forward.
Um, if you have questions throughout, I want to. There's a lot of people on the call. We are going to have some pauses throughout here to answer any questions. Have you asked questions? Tell us is going to help me out with that um, and then I hope we have time to get back to you in your day. An hour and a half. Um!
My goal is to get you out of here early with a lot of information. Uh, but happy to answer any questions you have along the way. We'll take pauses and at the end, and then anything we don't get to, I want to assure you. Please drop them in the chat. You got questions. They just come up. Please drop them in there. We're going to make a point after this course to uh, after this session, to to answer every single question you have, and we'll do that through the pavilion slack, and make sure that we have a kind of personal connections there. Happy to do that.
Cool, all right. So why play books now?
You might be asking why I have a whole section dedicated to why playbooks right out of the gate here right? Um. Truth is, I I was kind of hesitant towards this, and my

colleague suggested it, and we were talking about this course over the summer, and it kind of. After questioning him, I realized he was right.
And, in fact, why a playbook is a very common question. We get from sales, people, managers, and execs. Why are we building a playbook, right? And I think it's a great question to ask. Um. Usually we're working to solve some other challenge. We're not solving a playbook challenge. We're solving some challenge we have in our sales uh ecosystem right? Um, and playbooks may come in as a suggested way to handle that. Um. So let's take a look at Why, playbacks have actually been used in this ever changing business
that we're in
um.
The playbooks are used to help define and train your processes and protocols right. They can help establish clear expectations and get everybody on the same page. They lay out the science of your sales organization, how you operate one hundred and fifty.
With them you can establish consistency and performance.
That consistency can lead to repeatability and ultimately help you scale your business right? Um. I usually have to backtrack my way into that, because most people say, how do we scale our business? Right? That's a big question. People want to know, and that I I have a quote on this will share at the end. But basically you, you don't start there. Okay, Um.
So playbooks can also help you increase, win rates and implement change initiatives. They're a great tool.
Um, What is not in this definition is the big warning level. Um, yes, they can help you do these things, but they do not do them by themselves. Um, you can build the best playbook ever, but if you Don't have it aligned for impact, it will likely fail to deliver results.
We're going to unpack most of the common reasons why playbooks fail in session two. But in the short list is typically less about what was in them, and it's more because the why, when and how they were implemented. Okay, Um,
now, playbooks. Aren't just for sales. Right? Um. They're used in many different business units and functions, and in fact, I think they should be using even more. Uh I'm. In New York, and there, obviously some really great restaurants in New York um scale. Consulting one of the firms that I work with. Uh, in fact, did a whole study around restaurant playbooks and uh, one of the the restaurants we featured was the Grammar C Tavern in New York. We've ever been there. Fantastic restaurant. Good luck getting a reservation. Um! They use a playbook to ensure a refined high quality dining experience for every single customer that comes in.
It defines how they dress, how they greet customers at the door, how they move through the out the restaurant! What they start you off with Do they give you water? Do they give you something to wet your appetite right to open up your taste? Buds? Um! How often should they visit and check in with you at the table. That can be

annoying. Right? Um! How they present the menu. It defines how they put food on the plate and bring it out at the right temperature. Um! That's a playbook. They not only train every single staff.
It's one of the big reasons you're gonna have a hard time getting a reservation there.
All right, sports teams. I I don't like a lot of sports analogies, I promise i'm not going to end date you with them. Um, although they do apply um. I grew up on clumps and tiger football. They're not having the greatest season but for anyone that follows football as a sport. One of the things I love is seeing how often they use their playbook. There's not a quarterback on the field that doesn't have a little arm band has all their plays written on them right here. There's not a coach or team member that doesn't have a headphone set
talking to the guy in the box. Who's telling them what plays to think about and what to make? They're constantly adjusting One of the favorite things that I love seeing is um. I think it's mostly in college football, but you'll see these big like poster cards that they hold up on the field, and it's got like emojis and weird things. It's got like picture of Michael Jackson, and a smiley face and a thumbs up what? I have no idea what's going on right, but they do, and when they hold it up everybody on the teal moves. It means something is going on. They've got to move
somebody into position because of a certain situation right.
Get out there, everybody. Let's go. Have a good time without some kind of playbook in mind. Right? Why would you do that otherwise with your sales team. Um. So playbooks can help you help teams say, and do the right thing with the right person at the right time.
The idea that you can impact those odds. That's the science of sales
cool.
Um. So before we kind of dig in some other pieces here in the framework. Um, let's look at a few ways in which sales playbooks are used. Um! We'll look at where they can be effective for you. Um. This is by no means an exhaustive list. But these are some of the larger buckets or areas where of impact where I've seen them be really effective for sales teams
first on boarding and training. Um, I worked with a company recently where they wanted to implement med pick as their methodology. Right? I don't know how many of you out there use med pick or use bat um We We had already run trainings on med pick with some of the existing team. Um! We had some new hires coming in um, and they were senior hires. So they were saying that they were familiar with myth pick great uh! So the vp of sales and I sat down, and we were like, Hey, Do we really need to include a Med pick training in our
sales playbook, or on boarding here? And we thought about it. And then i'm glad that we did, because we ended up putting making sure that Med Pick got in there and realigning everybody to how we wanted to use med pick in our business, and thank goodness we did, because everybody had a different idea of how to use it right. So we got everybody that consistency established on how we were going to

use it. Great tool for on boarding. If you're going to create material for that kind of thing or a training and product and rollouts.
Put it in your playbook. It's a great addition. It can become adopted. You can change it. You can change it six months later, one year later. That's the beauty of it.
Next communication planning right? This is an area I see playbooks very effective, yet highly under underutilized, I should say um. So include things like Service Level agreements between teams how to Sdrs and Aes. If you have those two teams on your plate,
I think you already know Handoffs.
They're paying in the ass. Right? Um! How do you get everybody respecting each other? Sla's are a great tool for that? I make sure they're in every one of my playbooks that have some kind of connecting teams or handoffs workflows on how you get deals through communication preferences. How do you, if you need to go, talk to the Director of Sales, or the Vp of Sales or the Ceo? How did they like to be convers convers with or reached out to. Is it slack? Is it email? Let them know, Like, let's make sure that we have good communication plans and handoffs between our teams. This is an opportunity to do that. Um! It becomes very useful. It effective for teams to get aligned, and you need to do that early and often.
Um the most uh, most often I see uh people building playbooks and putting performance drivers in there great. They can be highly effective at this um today. Uh we talk a lot about by our journeys and customer experience in our salesforce. Right um. Trying to do this consistently is next impossible. If you don't get everybody on the same page to deliver a customer experience, I may think that they like this. You may think they like another thing.
Let's even the playing field and deliver that. And when doing that we'll be able to really know what our customers want.
Um. In fact, I work with teams to decrease sales, cycles, just using playbooks um by thirty to fifty. That's taking six months in a sales cycle and reducing it to three months. That's powerful impact. Um! And we did that by getting them to work with clear demo processes, pov processes and follow up plays, timing everything directly to the questions and a level of discovery that they were doing.
That's how we decrease those sales cycles You're you're you're I can guarantee your Cfo and Ceo will thank you if you're decreasing sales cycles by fifty percent. Um. Discovery, qualification processes. Another specific area that we love to make an impact on. Um. So this is uh, these are some of the great areas that we could think that we can uh impact here any other questions here, just to pause uh thoughts uh, on these areas. Other things. To add,
we actually had a question that came in a little bit earlier in the chat. That was what's the difference between a playbook and a blueprint. Are they interchangeable?
Good question.
So maybe terminology wise. I think a blueprint I like to think of like a tech stack blueprint or metric tracking blueprint. Um, I use a tool called whimsical. I'm a big fan

of visual tools. Um, you can use it on a whiteboard right? That's where it kind of that's basically all whimsical is a big whiteboard. Uh, but uh you, you you can draw out and map how the things move through your organization One of my favorite exercises, and we will dig into this in session to
is taking the buyers journey. What is the buyer experience? And then, taking the sales process and the sales journey that we are asking all our sales people to follow every day. How do those align? Often you'll find Whoa! This is our sales process is creating a terrible customer experience, right? And so drawing that out mapping that out, I call that a blueprint um, because it's more of an archae or architectural kind of a drawing. Um. And so I think that
sales playbooks are more encompassing to answer that question.
Yeah, thank you. And then we had one that just came in from Alex. What's the best medium to create playbooks, word Google, Docs, et cetera.
Alex. Great question. Um, all of the above. So here's a great question to ask your team and get to know. I don't know how big your team is, Alex. But uh, put it in the chat if you want to. If we won't get this specific here. But um! It gets harder. The bigger your team you're working with. But individual. Everybody learns a little different is the main thing to keep in mind. Some people are visual learners, some people, you know, just give me the just. Give me the rule set, and i'm off right.
What you want to be able to do is provide materials and formats that work for everybody. Um. So Yeah, when I say all of the above, look for the opportunity to start somewhere and then expand on that, turn it into video content. Turn it into a visual thing, uh, you know. Have your graphics department draw up uh a blueprint, you know, if you, if you don't have the time to do it. Um. So uh we use. I use end up using Google um
Google drive for a lot of things,
pinning parts of their playbook to their desk or above their computer. That's when you know you got good stuff
alright, we have. Can we have one more question and it will be fun. Okay, Um, from out in change management through a playbook. How do you deal with team members who get results in their own way, and might resist to the team's, joint playbook.
Ah,
great question. A tough one to manage. I'll tell you that. Um As a lone wolf, I can tell you that i'm that guy. Um, yeah, I got my own way. It's great. I can. I can run my own thing cool. That's great. Everybody is doing that. What you want to do is give that person room right? They might be amazing performer. You don't want to shut that down right. What you want to do is is is help them understand the benefits of a playbook. I'm going to say this now. I was going to hold it off till later. But
um! I'll tell you the number one reason sales playbooks fail, and that's because nobody has been taught how to use them right. So that includes loan wolves. There is, I think, as far as I know, this is one of the only trainings that's actually being done.

That's why I was so excited about it. Um! I know Vp. Of sales, executive sales. Managers have been in the field forever. They all have playbooks. They've never been taught, nor have they taught their team how to actually use it.
So getting that person involved is a great way to do it and say, Hey, look you're a great performer. Let's bring you in. Help me develop this playbook, and then that way Your methodologies are being included, too. They'll use it from there right, and you got to give it something to where they see it is useful. You're always going to have that person on your team.
It's not worth making them the black sheep bring them in and look for opportunities to include them.
Great question, though.
Oh, okay.
So at the end of the day it's all about results. Right? Um,
Whether you're rolling out your first sale strategy overhauling an existing process, or you're in the middle of a massive change Management initiative. You're making decisions to invest time and resources.
You'll need to drive results, or that's going to mean your job. That's something I deal with every day.
Playbooks are not going to do that work for you, but done right. They're going to help you shape and roll out this strategy and put more wins on the board. Um! These are the kind of the results that you're looking for. We're going to talk about how to track this kind of information so that you can put up sixty and fifty percent increases on. When you implement you need to start measuring now today, today, if you're not already measuring every little increment the hard stuff to measure right. That's how you get this information,
you can roll it up and show your efforts. Um! Use this information to help get the buy in, and we'll talk about that.
Here's an amazing Stat. Um. This this is this study came from sales uh salesforce, right? Uh they have over one hundred and fifty thousand customers. Last I checked um. I find this that very interesting. The idea that forty, roughly, sixty thousand of their customers are not using a playbook, and they have a crm. That's pretty significant. Uh it kind of makes you wonder like, uh, how many teams and tools are they paying for out there that they're already not utilizing? Well, Um, that's a big. It's been
item right there, so you could show this some significant growth with this group.
All right, One more poll. This is the second one, I promise is the last. Um, But um tell us, and can we can we run this question now?
All right. We'll give everyone about five more seconds.
Okay, Ooh! Interesting results. Here we go.
Ha! Sometimes All right.
That's what I uh um. I I expected to see a little bit more on the No. Um, but uh, great sometimes is is better than no um

good deal. So I think. Let's look at. How do we make a more effective here, guys? Um. So when do we want to develop a playbook? Uh, this is we're going to Now go into my framework. It's got five pillars right, so we're going to touch on some of the big places here we talked about. Why, we might want to build a playbook. Now we need to look at when
first pillar timing.
Um! I like to think of timing as this a trigger of when to build out or expand your playbook. Look for these opportunities, um same same as same deal. Timing is a big part of your buyers process. Are they ready to buy? Is now a good time? Are they waiting six months. We want to know that right? That's what we're qualifying for. Ban is built around that. Um, I've built entire algorithm tools that just pick the timing of the buyer, so that we can sell at the right time.
Timing is when you want to inform your playbook. It informs the evolution of your entire sales program. So start here. Um! As you grow, your playbooks going to grow with you. Keep that in mind.
So even if you know everything about what you want to you how your team, the future operate, and what they need to be doing? Don't. Just try and build this playbook in a bubble right Now
please don't do that. I've done. I've made that mistake, and I've built massive playbooks and a bubble, thinking, Oh, this is all the stuff we want to do. Let's put it all in there. By the time I went to roll it out, half of it was already obsolete. Right. We had changed something in the or so. Don't move that way. Keep it simple. Keep it bite size. Use the timing of events to drive it so. Some of these big triggers. Are you got a new product? You got a new service launch. Great! Let's talk about what needs to go to make that successful new territory. We're going into
new launch. Let's talk about what kind of value props how we speak into it. Are there different competitors? Acquisition merger, rebranding? How are we bringing teams together, taking the good getting rid of the bad um on board, and hiring. What do they need to know? To be successful in their first sixty days Right? Go to market. Right? How are we actually using this team to sell now? Not later. Let's think about that. Um. Icp and buyer concerns. Today's buyers
uh buying decision. If you're selling anything with any kind of complexity, there is not a single person that's making that decision. Don't, make that mistake. If I went to buy a pillow case. My wife has a say in that right? So nobody's making decisions by themselves. You may need eight different buyer personas, and not just their demographic psychographic information you need to know what they're interested in, and what matters to them go deep. Um change. Management is another big piece when we're creating.
So i'm getting change in an org. You need to get processes really align. So these are timing events that really matter, and it's the first pillar and a framework here that we're going to do is to build great playbooks, right?

Number two, setting expectations. What should you expect from your playbook right? It really comes down to goals and initiatives as with anything aligning expectations is going to be a key to success.
So my advice to you is start big, right zoom way out, and then we zoom in and there are the focus. So start with your company's goals. What is what's the company mission. What's the motto here? What's the mission top goal for the year? Then how do your goals in your department? Roll up to that. That could be Okay, ours or your big top line objectives. Don't. Don't try not to ever have more than three Um, as a rule. There, Um, Then you're rolling in your key results your initiatives that roll up to that.
All this is connecting. Um! It's imperative that this all stacks in a line so that your playbook initiatives. Drive to your your key results. Drive to your objectives. Drive to the company goals if you're new to. Okay, ours or Kpis. That's okay. Um. Let that be your starting point. I'm personally a fan of the four Dx method. Um, I think Steven Covey and some of these guys had us say in that. Um but um it. It introduces what's called uh lead and lag metrics, and how
you're tracking your goals.
When I have a mentor we'll dig into some more of that in session, too. But I have a mentor. That reminds me all the time. If you don't have a purpose, your purpose is to find your purpose right? Um. So start there. Um. Now. Playbooks can help teams works uh sell, smarter and faster right? So let's look at some of these ways they can break down micro improvements at each conversion juncture. Right? You can get more meetings. Book more povs done nda sign. Those are micro conversions along the path they lead to increase revenue.
You add consistency to the sales processes when steps are clearly defined and outlined, so adding consistency to your sales, pitch and your sales story improves that customer experience one
right? So all these things start to stack, and these are great ways to set expectations that you want to track out of your playbook.
Um, I don't know how many of you are familiar with audience cancellation, but it's something I've been uh really working with a lot of companies with lately. Um! It's very easy to do to lose customers. You start with a big icp or a big group of customers. It's amazing how fast people can unsubscribe and get out of your network and target list. Now, um! This decreasing the cost of this massive initiative, and sales playbooks can help do that.
Um team improvements absolutely right. These are some of the ways that we can do that increasing confidence and knowledge base in your teams. It will increase the time on your sales, for it reduces procrastination and fear with your customers. Every salesperson has that It's your job to help them overcome that right? We can do that with some of this information. Um! You can increase the speed of onboarding ramp up times. Um! You can increase retention, rates right.
Um!

We talked a little bit about communication here
once. You have these kind of goals set in these expectations for this playbook. You don't need them all. You just need one or two Right? Um! You can. Then, you know, explain why your your your valuable time and crafting and putting together a playbook is worth it right? You can almost put a number on it. Um, because you're going to be able to track time to ramp up training. New salespeople is going to be quicker and easier when you have these clear expectations of your customers, and how you bought they both,
and what pain points they experience. Right. Um. I like to capture time spent selling versus not selling after a ramp up. How much is my salesforce on the actual floor and engaging with customers. It's a hard one to track, but very good to know, because you can improve on it. Um, sales cycle link. We talked a lot about that one. But the more you shortened, the faster you're adding revenue, and then cost of audience cancellation here. Right? Um! This is one of the fastest ways
you can just sl it down. You can use playbooks to set these clear guard rails of what not to do, and that's a great way to alleviate sales, cancellation, um or or audience cancellation. Sorry um
course measuring conversion rates setting me most uh meetings, Demos. These are great things uh to effect here. Um, I will tell you one quick story if you're i'm familiar with a guy, Eli Colin of salesforce uh I had the pleasure of meeting him several times. Love his books. Um. One of his best stories is the work that he did again at salesforce Um, and they were able to dial in pitch changes across multiple multiple territories with their with their actual enablement program, and what they did, what they were able to say.
Hey, look! We're going to say this today, guys, we're going to use this pitch right, and they would watch and be able to see the needle and conversion rates move up or down, and they would make. They may. If it obviously went up. They double down on that. If it didn't go up they would obviously try and replace it. They were able to see this on a weekly basis and monitor it, and that's how they were able to refine pitch. I love that story
so. Um, those are the first two pillars, timing and expectations. Right um Those help you to find the why and the when. Now we're going to look at the how to develop these as you build out, and what to include before we do any questions uh Paul's here
great timing. So we had a question that came in from Kara. Do you recommend multiple playbooks designed for specific scenarios, eg. New product launch first ninety days as a rep, et cetera, or one master playbook that encompasses all.
Uh, definitely, The smaller playbooks have them very specific. You can put them all in a master document and have it in one place totally fine to do um, but I would recommend breaking it up and building them and rolling them out incrementally. Very important Uh, nobody likes to sit through an encyclopedia and just be handed that and say, here we go. Um! So uh break them up. Absolutely a smart move.

And we we're gonna actually talk about some ways to break them up, to really drive that, and how to include them in the day to day. Um! So great question
great, that's all we have at the moment. Cool thanks for these. All right, so how to build
um. We talked about the timing. We talked about the expectations. Third pillar here is to find your direction right. Where are we going with this whole thing? Right? Who's it for the best way I found to do this is ask questions. Um. They can help you set this initial direction, but they can also help you Check the bearings as you're going. Check The need for playbooks. Change is going to be constant.
Just just absorb that right? Um. So how do you build and iterate over time? So these questions become great ones? There's more. I'm sure that you'll add to this Um: So who's the intended audience for the playbook? Yeah, sales Okay, great. Do we need to build one? I think the question here. Do we need to build one for Sr's aes ses am partner. Managers everybody. Yeah, pretty much. They may have a lot of the same things, but make it theirs right. Don't give your Sdrs the Ae playbook and say good luck
right? We need to have specific things, and they may have a different section. Right? So when and how is it going to be used at sales? Play bucks out of the gate, Make for good onboarding collateral for new hires right. We know that. Okay, Most of the time they get shelved after that great. They were trained on it. We're good. Um, no. They're going to forget everything, and what it's not going to happen is they're not going to put it into use. How do we get it into their day to day? The trick then becomes, How do you make it resource? A resource moving on going,
and I like to think of it as like a pocket Guy again, How do? What's going to make them pin it to their desk?
Um expected results. How would they measure impact? We talked a lot about this already, but um. You know this is something you need to revisit. Your company. Goals are going to change your your department. Goals are going to change. Your targets are going to change. Make sure this is a question you should just keep asking,
How does it align? Does it still align? Do we need to change things? Do we need to add things or remove things right? This will help you stay on. Course. Um! What about team Members needed to drive results? Um, we're gonna d dig deep in this in Section two. But, in short, we want to outline the specific tools and intelligence that our players actually need in the field right. Without that you lose their buy it. They won't use it, and that's where you You can't go wrong here. Right?
Um!
How will they be updated another one that's really important. Um accountability is where this comes in. Who's going to be in charge of it? If this is just a manager tool that you're dictating down to your teams. It will never get embraced. Everybody likes to buck management when they have the opportunity,
and you don't need another hygiene problem like you already have with your crm. Trust me, Nobody wants that. Um. Okay. Um. So finding your direction next

aligning all this with your objectives, all right. Playbooks are living documents. They need to be updated and stay relevant, right? So we need to keep them useful. Um, we set the expectations. Now let's put all these pieces together and let's get the alignment. So let's walk through an example. Here.
Um
couple of teams here we could do. We got inbound outbound. Right we get. What gross stage are we in? Are we go to market? Are we expanding? We got a merger and acquisition going on? Um! What's the customer opportunity, size? Are we just after enterprise or mid market? Are we all of the above? How are we going to market here? Um, product service lines Do we have multiples? Are they different for different audiences, different business units?
Does that change by territory? These are all questions we have Right? Uh what's our teams look like, are they? Sdrs aes uh sales, Ops sees um, you know. Customer success. How big do we have to think here? And who's going to be impacting. Um, please don't leave out your managers. Managers also need playbooks. Um, please, don't leave out anybody like that. They need to know how it's working right that they always get out in this, and it's not fair. Uh managers also need resources. So
um! Now, let's look at how we put this together. How do we align this with the timing, the expectations, and our direction? Um! So this is a I kind of like. Break this out. You'll see it in the template. Um. So let's say we got an outbound team great. We got a go-to-market strategy that we're working on here. Okay, um we're only focused on mid market enterprise. We're not ready for with this team. Smb is too small for revenue impact. So we're going to focus on that great um. The we're looking at a main product line
territory. Let's say us uh for right now. Great. Okay. So we got three teams that we're building for here. We're going to go for Sdrs aes and customer success right? So now we kind of need three versions. They don't need to be three uh completely bespoke playbooks, but they may need some different information for each one of these teams. Now we've aligned this with our entire objective, our timing, and this is a great way to do it. List out. This is like an outline
for how? What needs to go in it? And who is it for?
Makes sense
cool? Um. Now,
what we're gonna put in this thing right last part Here the framework is to put the actual content uh Sales Playbook is your team's guide for how to successfully sell your product or service to your customers. It's like your user manual Um. They should help you your reps, and anyone who reads it. Anybody who picks this thing up should be able to deploy best practices, strategies, and processes to win business and convert customers. That means they actually have to be able to
to use it out in the field. If you think of it like that, you think of it. I like to think of it as like a backpack. Right? Um, I don't want to carry around a bunch of again. Wait. I'm

going to be out in the field. Um, i'm only going to pack what I need to be successful out there.
So let's do a quick overview of what might go into this backpack.
Um. So process and strategy. We're going to have our go to market plan. We're going to have some uh company influence and approval protocols. We're going to have sales, protocols, and procedures process overviews, Guidelines. Poc: How do we run them? Qv: How do we run them uh circles of influence? Who do we talk to? Who do we work with. How do we work with them? Okay, Ours Kpis and um pricing discounts. These are all great things for process and strategy,
um resources. And Intel, we want to make sure our reps are informed, and they're knowledgeable about our products. That gives them the confidence to go out and do their job. Um! They need to know about our competitors. They need to know about our customers right? We need to have that information in here.
Um performance enablement
course. Yes, Let's make sure we're getting everybody set up for success uh how to pitch it. How do we talk to value no more feature selling scripts and campaigns emails most of the reps I work with. They don't know how to write a business summary that's Let's get them over that. Let's help them inform our customers right by our intent scoring. What do they think about this? How are they doing that salesplace situational? How do we follow up, guys? How do we prospect all of those things. We're going to go deep on this in this course. Um. Mutual action plans. I love it. How do we get the customer working with us. Customer objections, nurturing content. These are all great performance drivers we want to include in here.
Okay,
you uh you full yet, you know. Uh, there's a lot of things going in here. So uh, let's think about. Uh, you know. Are we building a set of encyclopedias that are? We got a lot in our backpack. What else? What else might we want? What about some uh crm sales off specs? Okay,
Um, sales collateral. Um, Here is what other things you guys are thinking of here. These are some additions that I would add competitive batter cards uh links to videos. Pdfs: Um.
My favorite new addition in playbooks recommended self advancement. You don't have a sales enablement program, not a problem. You know what? Give it to get the resource to your team. Start from the company. What is the Ceo reading? What are you reading as a vp of sales? Let's put it in here. Let's give them people to follow on linkedin. Let's give them some methods that they might want to think about that align with our business objectives. Maybe we're not teaching them yet, but they want to go, get hip to them. You want them to grow. They want to feel you want to retain that
the talent, give them information. Give them access to pavilion courses. These are the kind of things that we can put into a playbook. Um! Anything else that you guys want to throw out there that must must have here.

Yeah, feel free to raise your hand in the chat or come off mute and share them as well.
If you have any other suggestions
we had Russell say in the Sales playbook we're developing, we're including attributes of top performers, i. E. Describing behaviors and attributes.
I love that almost like sales almost like buyer personas. But for your sales team I love it like Here's Here's what our high performers are like, and what their activities are. It's a great thing to include. Kristy has her hand up.
I just put this in the chat, too, so i'll read um one bit of feedback that I've gotten about playbooks, given everything you've listed is that it's overwhelming for the seller. They don't know where to start with all this information that they're seeing So I wonder if you have any recommendations on how to organize, so that they can get those bite size chunks if it's just a matter of having smaller playbooks instead, and then putting them all together as a package. Or
please guide me. Yes, uh great question, Kristy. Now um! I don't want to say wait till session two, but we are going to go deep into that. Uh, in two big areas. One is that I talk about how to prioritize the needs of your sellers. So we talked about kind of a top down approach here of how to think about this as a framework, and we're building. But Really, we got to almost reverse that and think about what are they? They actually need, right? And so that becomes
a way to get them involved right to actually using them because they're informing it, whatever you need. Uh, we just need a one sheet right, you know. Give me a one sheet. Well cool. We'll develop that one sheet. But we're gonna also inform and work with you on how to use it. How? Who's our best performer using the one sheet? Let's track how well the one she gets used so that we can improve on that. So, um! You got to include them in it as far as how it gets packaged and delivered. We can't just build a playbook and say, Here you go, team,
you ask you, you ask, and you shall receive. Oh, No, we have to include it. And so the second thing we're going to really dig deep on, and and next week is how to do that right? How do you get it as part of your day to day? How do you get it pinned to the thing I used to like? Sit around and be like by name, like pinning this thing up. It's such a great playbook. Why, don't they put it to their desk. They're not going to do it on their own, and so like you really have to get them involved. And and that can't be dictated right. It has to be
done through some methodologies here. So Um, that's that's a big part of it. And that means using sales huddles, using the playbook in your sales team meetings right using it along the way in that. That's how you ultimately how you do it. So we have to look for those opportunities to embrace it.
Oh, great question! And then we had a question that came in from Rich a little bit earlier, when you're going through all the specifications, Do you also include what not to do or say,

uh, I love that. Yeah, absolutely. That's so. We talk about um kind of that audience cancellation. I put that in earlier. Um,
you know it's so easy to get out and lose your audience these days. Literally. All they got to do is unsubscribe. And now they're off your list, and you know maybe they put you on a do not, you know, Call number two. You just lost a potential customer because of something you said the way you approach. You need to learn from that Um. So, showing what not to do, I call them guard rails. So you know. How do we say like? For instance, I have a big thing. You'll see if you check me out on Linkedin. I post this at least everything
three months, because i'm always just like why I need my listen to me. Um, stop using the word just in your emails. I see so many sales people reaching out to me, going just following up. Well, i'm just deleting your email, you know. So it's it. It really bothers me Why, we're just doing anything i'm just not going to buy from you so like Deli. How do we deliver value? We don't want to make it easy to get out of this right. There's a great book called Hooked, and it's about
product, You know. Kind of How do you get products, people to come back to products I like to think of like salespeople. Is that? How do you make them feel like I'm sitting beside them. I'm their trusted advisor. That's the kind of selling we want to do so. Great Christian Christy, I promise we'll get more deep on that. But it's about getting into the day to day,
and there's one more question before we move on from Russell. These are great. Thank you so much for the collaboration. Um for field reps. We're building, working off of a Territory plan quarterly. Should that stand alongside their playbook or be integrated within it.
Build reps working on a territory. Uh yeah, So it it's a component right? Um, it. It can live beside it. It does you? You could include it. I would suggest that you include it um as a chapter or something in it, because it, if it's a useful tool, we want to bring that closer to the other useful tools and not have so many resources. What happens is we we develop all these separate things, and we spread them out. Um! They get into a repository, and then you're like, What is that? How
last month or last quarters per air toy plan? Or is it this quarters? And you know somebody's got to manage all that? Um! The playbook becomes a way to say, this is what's current, and you can put assigned ownership to that. Say, Hey, playbook is our most current version. Always refer back to that chapter. Three Has your territory plans right? Um. Use that as a way to bring this into the fault. So great question,
Um, cool. So uh, I want to be mindful of time here. Um, the
here's some tips. Um, It's okay to start small. All these questions have been about like we got all this stuff. How do we do it? Um start small, break things up. You can have separate documents with it, or different sections, and you can have everything in a major playbook, or you can have major Playbook with breakouts. Right? This is where video tools, like loom or gong, or something like that come into play. How breakout

videos that just address these issues reminders best performers kind of stuff like that.
Um look for different formats. Um start with what's needed. What is your team need? Right? There's this objective. You want to put all this stuff in it. But what do they really need? That's how you get them using that. So you have to reverse engineer. It um identify your unique What's unique about you versus every other sales org and involve your team in the build
outline these steps. Use this framework if it's helpful. But you need to fill in the strategy and tactics. Let everybody know that this is why we're doing this right. Inform them that we're not just giving you some stuff that managers like to do. We're giving you really strategy and forming you on how this all aligns to. Why, your performance really matters towards our strategy. Use this early and often look for opportunities to include it and look for opportunities to keep it rolling, analyze, optimize, look for
track everything that you can
um use your technology. There are so many great plugins and tools. Now where you can take this playbook and you can stick it right in your Crm it'll guide it. You can automate it right. Um. You can provide clear accountability and ownership lines on who owns What
if your time Star? This is a lot of work. Use experts. That's what I do. Day in and day out, people call me, and they're like. I want to build this play, but I got my ideas. Can you just help me do it? That's where I pop in. I do the work for you. Um! And you know what you can get that resource. You can get that approval, and we're going to talk about how to do that.
So these are some good tips here. Um
last last piece of this course today in this session I want to dig into aligning stakeholders. Right. You gotta get. Buy it for this. You don't need just buy them from your Ceo to give you budget you need buy in from your team. We're going to talk about how this gets done.
I think this is one of the most valuable pieces of the course here. Um! So um
I wasn't familiar with uh Edwards deming, but it's so much. But then you kind of looking around for some kind of things that resonated for me in this um. He was a top, you know, kind of business management and consultant leader. He was a statistician and professor at the early in the early One Thousand nine hundreds. This was one of his famous quotes in that time. It's still true today. Right expectations are something that everyone should want to get clear on in their job.
Getting buy in is very similar.
In fact, when you seek, buy in. You're setting
and managing expectations of your role of your team's role and of your initiatives you're setting, that this is your opportunity to dictate that right? Not just to be called on. So when I ask, and when I go and see uh buy in from Execs, rather than thinking of it as me, grobbling and saying, Please, can we have budget and approval for this?

It's really more akin to. Here's what we're doing Here's why here's what kind of resources. We need to achieve it. Cool, We're managing those expectations. Here's what i'm going to give you an
right um, no matter what is key to development and rollout. Um. So our accountability lines. So each group's involvement will depend on which team circumstances you're building for. So I found the best way to do this is to map out a circle of influence.
So let's use a little scenario. We want to build a playbook for our ae team, right? They're going to be our focus of our playbook. Great Um! Who we're going to need to get involved around that. So of course, the aes are going to be involved. Sdrs. Anybody that's touching them along this kind of customer path right? Any handoffs they're going to be in need to be involved and have a say in it. Marketing is going to want to say salesops product marketing, too, right? They're all going to want to have a voice
in building. This include them get their input, have them give them some accountability in right. Um, This is your builder circle, right? This is who you're building. The playbook will
next
called the Influencer Circle. This is who you want to wake, aware of and share insights with. Right? Um. So go tell Cs. Go tell legal go to finance. Tell tech, let them know. Hey, we're building this ae playbook. Here's what we're we're hoping to do with it. Here's our expectation. Here's the results. And you know what guys i'm going to keep you guys up month updated monthly Anything else you'd like for us to include right? Oh, yeah. Why, don't you include uh, you know, Commission tracking uh,
so launching include, you know, legal change tracking. How are we going to do that? They need to know the process for how they talk to me. Great! Let's make sure that's in there. So get them involved. That's your influencers. Um! Then there's the buy in circle. So depending on the or size. You may not have all your execs on this. You may not need approval or buy it from everyone. Um! But you're going to want to make sure that you have voice this and show how you're planning it, how it rolls up to company initiatives.
Um!
So this is where this framework. The five pillars that we walk through are really going to come in handy. Okay, uh, we're going to work with each one of these teams to communicate. We're going to lay out our expectations for how everything rolls up to goal. We're going to talk about getting aligned with the timing and our core initiatives and how we track to those we're going to tell everybody this. We're going to be asking key questions about our audience before they ask them about us, right? We're going to talk about. Yeah, We know how to roll it out. We're thinking about this and up.
We're gonna be aligning it. We're going to be aligning with our teams the content for these initiatives. Um. And last, we're only going to pack what we need because we're

gonna make sure we don't over build because we're going to need the resources. We're going to reply the results. And then we're going to get more resources to build more right, because they're going to work as a starting small
um pro tip on this is look to include Sla as part of the Playbook service Level agreements between all these teams. What do they want? What is this person will get both person's Voice: The reason you do that
brings them to the table. Everybody wants to be able to have a say on how the aes interact with them. Str. Say that they're not taking the leads and doing it. Let's have the Sdr. Say, let's have the ae say, let's make sure we're align. This can create drama in your organization. But you know what
you're going to get participation. Right? No doubt about that. So Sla is a great way to do it.
Cool. So that's the circle of influence. Um,
the
let's say here,
would you be able to repeat the Five Circle Categories? Just briefly, somebody had asked. Um,
um, as I call it. Oh, shoot, I just
okay, You guys still with me. Okay, uh, let's get back here.
Um, let's see.
So yes uh five pillars timing,
setting expectations.
I I find it a great tool because it gets me all this information, and then I can go to circulate it Right? Um! And the use it as the as the kind of circle of influence here.
Does that help answer the question? Yes, Absolutely. Thank you for clarifying.
Okay,
this is my the mindset. I want you all to be in when you're building a playbook, right? It helps kind of frame this initiative and gain by and put you in the right mindset. Think of it, this, and just re almost treat it like a mantra right In order to be effective. Your playbook needs to be in step with your senior leadership and align with your business calls
cool.
In order to be respected and credible, it will need to be trackable and accountable to results,
and in order to deliver results it will need to be used and deliver what my sales team needs to be successful.
Great mantra for building your playbooks. It includes all the pieces
I'm going to give you a play today, and this is what I'm calling the stakeholder buy in play. We're going to look at a lot of plays next week, even more on the third week. Um, these uh the graphs over here on the right um scaled at skill consulting. We issue. You can find it on the scales website. I think we just issued a new one uh this fall. Um, but basically, we issue it a couple of times a year. Um, The best plays that

we're tracking across all businesses that we work with, and we kind of roll them up and share them out, so
you can find that on the scale, consulting or scalecom.
It's a free resource, and we build plays for buyer intent and all different kinds of things that you may want to take advantage of. But here's a play uh for you to get stakeholder buy-in
right um number one step one know about stakeholders You're dealing with what's that mean I like to think of this as like an exercise just like I do in my sales practice. Um!
Picture all your people for buy in, as they are sitting around a big board room table. Right? Um. I love that as a visual, and i'm able to look every single one of them in the eye, and I can speak to their level of knowledge, their what they know about playbooks or don't speak to their needs. Hey, Cfo! This is why you're going to care about it. Hey, Cto! This is how you're going to care about it. Ceo. You know that objective. You said you want us to grow. We're going to do it. Here's how we're going to do it right. I can speak to each one of them about. Why, we're going to build a place.
So i'm knowing what who i'm dealing with here. Um,
right. We're able to talk to them about. Why, they care most um and what they know, and don't know about it. Do not assume anything you could send the vp of sales, or you know a top exec that used to be a vp of sales. Surely that guy knows about playbooks Right? Uh don't assume that they may think terribly about play. But if you could have the worst experience, remember almost Nobody, you know, has ever been trained on how to use them. Right? Um,
step two
create a cadence. You can dictate this for reviewing the results with them. Hey, guys, we're going to do this. This is how we're going to build it. And i'm going to bring you. This is our expectation. I'm going to bring you results Monthly. Here's I'm going to send it to you. I'll send it to you an email right. Now list out how well we're doing and the challenges we're having and the pivots. We're not the pivots we've made cool. I'm gonna bring it to you. Who doesn't want that great look forward to the report. Right? Um step three. Share the information about the effectiveness of playbooks. Again. Zoom nothing. This is what we're doing. This is why let them know,
Alleviate those questions before they even have them
Step four, start small, demonstrate the results. Don't build a huge playbook,
Um! And then hope that you can actually, you know, deliver massive results all in one shot. Start small, make it impactful, add the next thing, make it impactful. You can move like that. You can still move quickly. Right? This is a process
Step five. Share the results in the project champions. I love that I forget who was maybe Alex or somebody that said that they're They're celebrating their sales teams uh kind of top performance within their playbooks. Look for this opportunity early look for it. Often I love, making sure that it's in my Qbr. As my quarterly business

reviews, sales, kickoffs, i'm talking about things that we added to a playbook the things that we've seen results on things that fail. The things that worked right. Getting visibility throughout this process is key. I, as I tell all my reps, especially the ones that are in trouble. Stay visible. Right? Make your playbooks visible to the whole, or people will ask questions. They're going to want to build them for their group. Um! And don't wait for people to ask about them. You set the pace.
Um!
This is my mantra. Right? Um! Every business that I work with. They start out like this. I work with a lot of early stage companies, they say, Hey,
I want you to help me scale. We're ready to scale our business, and i'm like awesome with scale. Your business. I had to learn the hard way that for most companies scaling is not really practical expectation until you've been able to produce repeatable results. And in order to understand what's actually repeatable in your practice, you first have to lend on some level of consistency.
Um, I've been part of so many companies where the boards and the founders are like. Why can't you just repeat what the founder did? I'm closing six and seven figure deals. Get this team to do that. They want you to scale the founders operations. Great! That sounds easy, right. Just do what he did, or she did. Um, but not much of what that founder did or does is actually repeatable for a broader team. That's That's just the hard fact of it. But what we can do is we can pick a part what is repeatable in that process, and then we can get our teams doing that more consistently. That is the power of a playbook.
Cool um! Happy to answer more questions, but just to recap. We talked about why playbooks when to develop them how to build them, what will make them effective, and who needs to be involved today? Um,
i'm going to share a template around the five pillars. Um. And then next week we're going to be uh looking at, really how to make these sticks uh we're gonna uh sorry. See? Here we go uh we're going to look at. Why, they fail um to got some top reasons there. I've got studies on it. Uh we're going to set your team up for success,
how to deliver customer value, and why playbooks can really affect that metrics tracking how to get them into cr rooms, stakeholder expectations prioritizing team needs. Uh, Kristy, this is going to be for you and designing usability. Those are the two number one things. Sorry I put them at the end. Of course, too. You have to sit through with. But um the uh, the those are the two things that i'm most excited about delivering. It's the number one question I get.
How do we bake this in and get people excited about using them? We're going to talk about that. Um, We do have some time for other questions. Otherwise i'm absolutely happy to give time back to everyone.
Wonderful! Thank you so much. This is a fantastic session. Um! What I would love to do is open it up for the group. I know we had a few questions in the chat. I'd be happy to read through those, or if anybody wanted to ask them to tailor, and we could interact and get them answered before we wrap up.

Let's see, we had, Sebastian asked. Is there a specific tool in software that you recommend to build and or share the playbook.
Oh, you're muted.
Sorry uh I have some recommendations on that. Um, there's there's there's some really good tools. Fluent is one that I like. Um right now. I think that they've built it. It's mostly around how to get a champions to um sell for you, but they have a tool for that hubspot. Um has their own little plugin where you can build in sales playbook elements. Um, you a good sales. Ops person is usually able to kind of help you build in some of these elements. Um.
Apollo is one that's grid that I really like for automation
uh in that, because you can actually, you know, build in by our personas and send them on certain tracks uh, you know, with email sequences and things like that. So those are ones that come to mind a happy to talk at length about it, and always looking for new tools in that, though too
great. And then Nina asks what role is usually creating playbooks?
What role? Ha! Great question? You know, uh? Who asked this question?
That was Nina
um! Are you in sales? Uh what's your What's your role? Where you are? Yes, i'm currently a director of inside sales. But i'm trying to become more of all of sales. So, And this has been on top of mine, which is why I joined the class.
Oh, great, fantastic Um. So yeah, Typically, I found, if you have it in, if this is an enablement function, right building these playbooks they were, They're kind of enable and sitting and working with all the departments, and they're able to kind of get this done. They They often also get kind of pushed into a corner, because, you know, they have to do a lot of selling of their own worth in some internal selling. And so, um! If you don't have enablement on in in house now,
you can develop that enablement program. And I think that's an amazing kind of career development for you within a company. It's a huge opportunity. So I encourage you to do that. But um! And there's some great resources like uh, I think you know, through pavilion saleshood is one that I really like. Eli Cohen's group. It's all about kind of strengthening enablement. Kind of practice. Um, so otherwise it's it's on you
uh as a consultant who does this? I think that
um you know, just to let you know there are resources out there for you folks that will come in, and not all of them are just some methodology. There's a lot of that um, but they'll, you know. Templates, I found, can be helpful to start off. They can give you the framework. However, what you miss in that is, you build to the template, and then you forget about all your custom stuff that you need, you know. So there's some like hazards that you need to watch out for in that kind of development. But
um great that you're, you know, asking that question, and um kudos to you for trying to figure it out for your teams.
Thank you.

Are there any other questions feel free? You can come off mute. We'd love to pose them to Taylor before we wrap up
cool. I'll take that as a compliment that uh I was somewhat thorough uh, and or, as as my wife says, she's just tired of hearing me talk um, which I can take uh. So uh thank you all so much. I really appreciate it again. Please find me on Linkedin. Find me in the in the pavilion slack channels. I would love to uh continue our conversation. Um! And uh, happy to answer any other questions that you have
really looking forward to your feedback on this course. Um! What do you think? What do you want to hear more of? How can we make it better. Um. Taliesin and Kaylee are a great team here. Um, i'm excited to be a part of it. So let's make this better for you.
Thank you so much, Taylor. Thank you. Everyone for joining. We're looking forward to seeing you again next week. Have a good one.
Thanks all.

Class 2
text
Here, and then we're going to dig deep in each of these areas today. That is the idea. So number one.
Keep the focus on delivering customer value. This is so. This is like an age, old thing. People talk about it all the time at nauseum. however, when you're building the playbook if we build it only for ourselves. That's a problem. Engineer it towards the customer journey experience. You want to provide and involve your team and that get their input into this talk to your customers to use that product marketer in this, in this situation, right? What do our customers really want in the buying experience. Let's design this towards them. number 2 align with metrics early and often we talk a lot about this. The setting. Okay. Our setting Kpis is the mindset right Company mission. How does everything roll up? let's make sure we have that alignment. number 3. Provide visibility and manage expectations with your stakeholders
right setting up that cadence to keep everybody informed how things are going. This is what we expected. Don't just assume that they're gonna remember this right? Keep them in line. Look for the opportunity to send that out. I like to think of it like this. Playbooks are not a miracle drug. you. You can die by a 1,000 cuts. Then you can save a life with a 1,000 Band-aids
playbooks drive micro improvements. They can ultimately save your business
Number 4 prioritizing your deliverability. and and your timeline by team needs. I see a lot of leaders. We talked earlier about templates right? a lot of people want to rush to a template. Just give me the template. I'll build it. I'll roll it out with the team right. What I've realized is that you take the template, and then you build to the template. And what happens is that you forget, or you forget to include a lot of the customization and prioritization and actual team needs that need to go in there. There are unique

to your business. so use a template. That's great. I don't leave out the part that's unique to your business, and your team
Number 5 making it easy to use
I don't know who he is. Maybe traveled in a foreign country. But, I've been that person standing on the corner like looking at the map, and like twisting around trying to get my direction there. you know, trying to use the wrong language asking for help. Everyone absorbs information differently. we need to be able to deliver this. You know. Lms play things to pen print outs, pocket guides. Look for those opportunities. There's a lot of altern opportunities for us to differentiate now.
so how can you make it interactive for the individual? You probably are not going to have to have it 10 different ways. There's going to be some consensus in that. Last, but not least is let's integrate it into our day to day. This is really where the magic happens. You want your team in lock step and able to pivot on a dime.
This is how you do it. Right most playbooks get show, because they simply the team doesn't know how to use it. The managers don't know how to use it. They don't know how to incorporate it in their day to day.
I don't know what you' but I was never taught to use a playbook only through experience of seeing them fail. Over and over was I able to kind of figure some of these things out? I think this is the first course that we're we're doing on this. So you as sales team leaders you need to take ownership here. It's your responsibility to set the example. Bring the playbook to the meeting right? find ways to implement for your team.
all right.
Who knows what the show is from here? It's on a TV show anybody?
My, recognize
this random picture.
That guy in the middle, I think, is the host that's ahead.
Nina said. Bear Grills in the chat.
Yeah, that's right. You nailed the host. You know what the
well I know. I know the show he's on. I don't know if this is that same thing.
Oh, good! We said a venture racing or actually said Amazing race! That's what I thought it was, too, but it's actually the world's toughest race. I don't even know I think it's how many seasons it's going, but it's on Amazon. I watched it not too long ago with my kids.
it's for those of you that don't know about it. It's it's basically a
crazy adventure race that happens they have to get from Point a to point B over a series of of days. Right? and they have to use various methods of transportation. They each have a team, and it takes all physical endurance. They're going through rivers, and you know canoe trips across, you know not They're sleeping on rocks. They're bike riding. They're running all of this, and they have to finish together. You can see the pain on these folks faces. at every leg of the race. They're problem solved

course correcting, rallying together, trying to bring the weakest member of the team up
to me. The show is like a great analogy for how we need to work as sales teams. and how we need to be working with playbooks.
We are using our team calls and our one on one on really how to unpack. How how do we take the best of the best, put them in play at the best moments, and bring the the laggers up into that you know. Bring it.
Bring their a game and be inspired in that and help them along. We all need to finish and come to the finish line at the end of the year right? So anyway, I I found this a really good one if you haven't seen it. it's a good analogy for what we're trying to do here.
so customer value number one here. how many of you feel like you're delivering real customer value now
in your in the way that you're selling
any show of hands.
Anybody got a unique way that this translates to your team process right now.
We focused on customer value as a theme.
Anybody want to volunteer how they're doing that?
Okay, I'm: not.
I agree with Ashley Doesn't: Look like any hand raise kind of on the fence.
Okay, All right. So you know customer value again an eight- old thing. you know people talk about it a lot, but I see not it's very few or that are really delivering and thinking about this and that. You know why it's because we're focused on making sales.
We're thinking about our bottom one. We're thinking about our targets. We're thinking about how we need to do things. We're not thinking about the customer. You hear it at every juncture. in a sales call you hear it in a Cs call. It's often that we're trying to get what we want out of it first. and that's not customer first. Right.
What this means is that you know
you. You're endangering your salesforce. You're endangering your sale because your B to b customer today is more informed than ever. Right? They are more informed They're coming in with all kinds of information. They're able to find online. They've done their research in 9 times out of 10 cases here. and they're ready to set now. They're interested in the vendor part. You have to prepare your team to deliver real value at this juncture.
Not at the beginning of this right? and this does so. If you come into this situation with just a feature list.
the chances of you winning that sale are definitely reduced. Right?
So let's look at how some actual ways that we can really focus our playbooks and our sales messaging on delivering that customer value 150.
You gotta start with some tough questions. You know. What do the customers want? Right? What is they telling us that they will not. Just what we think we that they will

right what is valuable about our product to service this different the value to them, not what we think, not a feature right?
you've got to answer the Who is it valuable to how is the value to them? And when is it valuable to them if we can say that clearly that only helps articulate it.
design those processes and materials and messaging you need to work with marketing to make sure that that is being really connected here.
there's a little checklist will run through here. I'm not going to spend a ton of time on how to develop this customer value in this checklist. But please take this if you want to see more about it. I'm happy to pull together some templates. this is something that came out of Mckenzie's kind of checklist, and that we adopted
so you know, are the benefits. let's see if I can read this sorry
Are the benefits to explicit specific and clear right benefits that you're offering is the price to line to value Are we sure about that? Are we confident in that
or the target customer? Segment? Clearly identified? Who are we delivering this value? For? Is it just enterprise customers, and we're trying to sell it to Smb, or is it vice versa? What is the value difference between these 2 segments?
is the value proposition clear and simple. Is it something that we're taking a long time to explain, or can they really see that and get it right out of the gate.
Is it clear that the value proposition is superior for this target segment? If it's not, then you know, let's think about how to make that way less good product kind of feedback. Right? Not always easy to give. But let's make sure that we're delivering that value to the right segment
is the value proposition supported by evidence of adequate demand. What case studies do we have? What social proof do we have? What what how, or do we know that this is what they want. This comes back to what they want. Right? Let's make sure that we're aligning that we're not just trying to sell them something they don't actually need to
is the value proposition in light of competitors value. Proposition is that it? How do we stack up right? if there if everybody saying we've got the fastest tool in the market, then we we're talking about minutes or seconds all of a sudden. Do we really stack up, or is it comparable
that's not gonna make them overcome their switching costs right. How do we get around that? Maybe our value? maybe we're cheaper, so therefore they can save on that switching cost, even though it's the same amount of time that they're saving internally, and therefore they're saving money. That's good to know
is the value proposition achievable. And is it feasible, right? Is this something they can actually implement? Are we trying to sell an enterprise software to an Smb customer that they're never actually going to utilize.
you know. Then we got some. We got some on challenges that we've got overcome here.

so making sure that these value prompts and costs are really aligned early, and making sure we're articulating. Those in our playbooks, puts us in a customer centric mode mindset and gives our team the need what they need to sell
right.
This is another piece. Right? Read this for a second. The typical buying group for a complex B Twob. Solution involves 6 to 10 decision makers. I'm seeing this grow with every deal. I can't buy a pillar case without my wife getting involved.
show of hands. Who on this call has to navigate at least 3 or more stakeholders in their sales process. Who are you selling to at least 3 or more.
So I assume that about this group, not knowing what exactly what you guys are selling. I'd be surprised if anybody's only selling to a single buyer. In fact.
Who is anybody? Want to speak to how you're using by your personas
to understand those folks? Is anybody got the find that buyer, persona mapping, and really the understanding who those decision makers are, is working for them. Now, anybody wanted to share that
feel free to come off mute if you'd like to share with us.
These do come up mute. I kind of too many screens going on to
check some of the chats here. But.
Axel, I know you had your hand Raise wasn't sure if that was from the the previous question.
Nope, I'm happy to do a response to that one. So I've got a background in product marketing, and so on as a bit of a
my my! Forward to anyways. I I I believe in just simple association of business by a economic buyer, and and user in terms of dividing up the personas, you can get very complicated when you really technical buyer, for example, really fine tune security database I should that i'm i'm in the software area. but when you really sort of find to the various the soleas within the persona. So I try to keep it at the high level, and it's simply the express. You know. What does it take to address these
various groups of interest? And how do you navigate between them as part of the episode development.
I love that. Yeah. I mean, I think that you know product marketing is the backbone of these good buyer person and builds so I'm: i'm glad to hear your experience there, and that you're bringing that to the table actually.
so let's look a little bit, and i'll share how I I found that these buyer personas really come into play here. So they not only do we need to understand what our customers want, and how we fit in the market in our customer value build right, and our value proposition. We need to understand who it's valuable for, and our buyer person is as actable, was just saying, Really, help us do this right? So
you know. Again, I see this always as a series of questions that we really need to lay out and ask before we're being asked, or as we're building right so the number one mistake I see when building Icp and buyer personas is that we just build some demographic psychographic information. We roll out out with our reps and we're

like, yeah, here's where the buyer is. Go sell to them right. I see this day in and day out even with great marketers, even with great chronic markers. They kind of start with this
because it it kind of makes sense. but it's not. It's not really equipping the sales team with what they really need here. so just knowing that you are on Linkedin, and you have dogs, and you like to wise Netflix on the weekend
that doesn't really help me right? so what do they? What do the customers really need to know in their role? That's always a great question. I like to ask when building a buyer person, what what what their decisions in their role.
and oh, sorry! Who their decisions in their role impacts? Right? Does it? Does it impact just the team below them? Does it impact these guys to the right, to the left. Who does it really impact when they make decisions? And who are they making them for? Ceos, for instance, they may want to make it so that they look good and get pr right. They want to look good to the board. They want to look good to the, to the outside organization, and they want to make their their employees happy at the end of the day. Right? So those are 3 things that are maybe a. C
is thinking about how their decisions will impact all of that right?
How do they make money? This is a key one that I see so many reps. You go in and you say, how does your customer make money? They can't answer that question. That's a problem, right. we need to know how our customers make money so that we can speak to that so that we could impact their business with our cell. Gotta be there.
What will help them personally at the end of the day you you hear it saying all the time. People don't buy products. They don't buy the brand. They buy the person selling it to them right? They're buying from a person that's. That's often true right, but they're also buying because it impacts them. It's going to make them look good. Right? How do we position this to where it makes them look good and feel good? you know what are the benefits of buying from us and in in their in their eyes? Right
And then how and when will they need information from us, so they don't need everything. We can't just throw all this information at them and say, here's everything about a product, and here's dial needs. And this is what it Here's how you're going to make money, and they do all that. They don't need all of that. They They may need it over time, but they don't need it all in one shots too much to digest.
How do we roll that out? How can we think? Get in the buyers, Ted, and roll that out. And how do we build and equip our teams with that information so that they can do that confidently right? i'm gonna share. This is a an example of a recent buyer persona. I hope everybody can kind of see this a little bit, but
i'm sorry I've got to kind of look on another screen here. But the this is something I've been doing, so
i'll map out all influence over a sale in my buyer personas I'll talk about who they are. I'll find someone. This is an actual picture of the project engineer in this setting. I want to know their motivations? Right? What are they? What's motivating them to

make decisions? What are their tendencies? Are they timeline, or are they process driven right in that role. What's the kind of tendency of this person to make decisions? Maybe they control the budgets. Maybe they don't. Maybe they can.
We care less about how much this cost? Right? so you know. And then what information do they want to know more about? Right? Let's put that down, even if we're making assumptions. Let's put it down.
then let's equip our sales, reps with how to use that information. If we just stop there and we roll it out. And we say, hey, guys, this is all your buyer cares about. Talk to him about it. No, it's not going to stick because it's not useful. Salespeople don't know how to use this information, yet they have a mentor. This is where you really come in and have to draw the connections. So talk about
knowing their motivations, knowing their tendencies, how what materials and pitch tips do we need to feed them?
When do we need to feed that over there? How is our process going to impact that decision for them? I like to think about is you know, these are the stories that we want to tell this person in their buying process. Right?
So this is how I've been laying that out. the let's just see if there's other things I wanted to mention here. you know, Don't. Just assume that your reps know this information, Don't. Just assume that your buyers have this information.
We always want to create this experience. This is a good buying experience. It's a good customer experience. If we're able to meet them at the table and speak like this right
any questions before we jump off kind of by a persona piece. Here
we had a question that came in the chat from out about the question, how do you make money? Is this still as relevant? If our product Isn't directly affecting revenue, but is more related to say, employee retention.
Yeah, absolutely. So. I I I think it's all You should always know about how they're making money, because they just take employee retention.
You know how many people does it take for them to have on hand to provide their good customer experience? Why is customer attention important to them? Why should it be important to them? We need to be able to articulate that to our customers right If I can help you create employee retention that's great.
Do they know Why, that's important. It's our job to inform them of that, Don't assume that they know that that will help their bottom line, because it will help them keep good informed people deliver better customer experiences for them, and grow their revenues
at the end of the day. If their company isn't making money and growing their job is on the line right? And so so is customer attention. Let's talk about how do we create that? So I I think the answer is, yes, we should always think about how their company is making money. You can't go wrong with that one.
Anyone have a alternative view on that. I'm curious.
Everyone's taking it in.

all right, all right. We had. We had 2 more really quick ones that actually came in. So actually was posing. What about buyer? Pain points?
Yeah. And actually, if you're able to come up, you if you wanted to clarify and not do a justice
no for sure. so we work in. Then I work in the new construction space in hospitality. And so we but we sell both a software and an actual electronic lock that would be on a hotel room and so a lot of times. If we're working with a general contractor, it's like my pro. If my products are late.
that has a deep impact on my business. It could cost me money. It could mean that i'm embarrassed, and they never hire me again so I could lose future work. that's what that's what i'm saying. So if our team is able to deliver, you can trust me. I will help you pick out the right products for your.
for what you need for your site.
Our team will deliver the products on time, and the ownership is gonna be happy, which is what we want, which is what the custom the Gc. Wants.
Then then we're all good. So those are major selling points for them, even if our product maybe could be looked at as a commodity, and not that different than the competitor. If we can come alongside them in a way that they trust us to deliver on time what they need, so that they're not going to pay extra fees.
in that instance i'm saying that
if we're working a different type of customer might be more concerned about the in and out of the product itself. But because we're working through either a distributor or some other middle man. They don't care as much about our product as as much as Are they able to get it at a cost that's gonna make them money.
Are they going to get it on time? Are we going to be able to deliver on our promises so that they can deliver on their promises, so that becomes key selling points in our conversation with them.
I love that, and those are key points that you can use with your distributor to make sure that they are kind of called out right. Is that how you you that to the distributors?
and eventually I want to go back to sales enablement. But I wanted to remember and and be in depth in what really happens on the field. So yes, they need. That's what we are working on teaching them. Yes.
yeah, I mean it's it's it's so great, and you know, to be able to call that out
in the buying moment. So and make that really no like this is that's that's value to the customer. Hey? You want to almost tell the stories of
the the the contractor who didn't get everything installed on time, and therefore it may have saved some money in that immediate job. But they didn't get the next job because they were. They didn't invite it back for the next hotel. And so, therefore was it really beneficial? No, you know. And how do you tell that story and get that in there, you know. All you need is those one that one good story, that kind of articulates that value really well.

something you can just feed to the distributor. They'll tell that over and over. Right. so. And how do you set them up for that? I love that?
Thanks for sharing that. Thank you so much. And then the last one before we move on was from Stefan, Whose responsibility is it to create persona sales enablement or marketing?
Well, I usually like to, you know. Get the boxing gloves on. Get everybody in the ring, and let's say, let's see who's ready to take this all now I I think. it's it's everybody's job right because it affects everybody's job. So how do we? You You You can take look at product marketing. Look at look at even the sales leaders. I've sometimes come in and just build them as as a you know Vp. Of sales or fractional, because they're not there right? Or because so, what depending on your team? I think you should have first have a meeting and articulate the ways to of why buyer personets are important for your team. Why, they're important for the org to really get straight. Make sure you have alignment right there. It's a great place to start.
Is everybody bought in on building buyer Person is awesome. Who can then take this on? Can product marketing? Do you feel like you need to have a voice in it marketing. Can you take this on sales leaders? Can you help take this on? Who's gonna do? What right? Maybe we need to go out and ask questions. Maybe we need to run a survey right to feedback into that, and so like that becomes very actionable, and everybody should own a piece of that. I think I know that's that's maybe not the answer you were looking for. but you know.
I think that it's it's worth the question every time of who can own this? And why do you want to own that part of it? And who's best to do it in your organization.
great question. All right. So next piece here. let's take that one step further. We've actually looked at our you know value prop. We've looked at our buyer personas where we're developing on that.
What about our customers or chart that influenced her, Matt? I love putting this together for my teams and rolling out an influencer chart. So, using that same project manager that was an industrial kind of card, we ended up having like 10 different buyer cards just like that within this, or to map out all of these influencers because we had guys going in, and they were sometimes meeting with a a paint manager or somebody on the floor, sometimes the painter and they were rolling up into this right. So we need
to know who to go to next, and how to navigate that space? And what that next person wanted to know? that became our multi-threading strategy right? How are we going to feed this person information to take to that person? How are we going to go around? Tell this person that we met with them, and we articulated this piece thought they might want to know right. That became some of our plays. We needed to know that landscape. so I love building this out. on top of that.
What is the buying journey?

If you look at this thing on on? I don't know if everybody can see it clearly, because it's just a paystone. This is actually from a Gartner article but I and i'll share the the link to you if you're interested. But
the I build these out every single with every single org. I'll look at. I do it in a tool called Whimsical. It's basically like a glorified whiteboard tool. But you can drag and drop shapes and draw lines really quickly. and i'm always looking for. Where is what's our customer journey? Assuming all of you already have a sales process is built into your crm. I'm. I'm. Assuming this, we're not going deep into that into this session. but assuming that's there. You know how to. You're discovering here
prospecting Here you're qualifying You're moving it through. Pov. You're moving it through a a pipeline right? That's your sales process.
This is your customer's journey right If you take the customer charity, and you think about all the ways they can be influenced. They're watching linkedin videos, Youtube videos. They're talking to someone in the hallway. All that kind of stuff comes into there. I like to unpack. Who's gonna kill your deal in this, you know it could be. Oh, man, you know the the husband of the the you know the person that i'm i'm talking to? Who's my main champion actually works for my competitor. Oh, Crap, you know, like
that could happen right so like how you got to embrace for all of that these kind of maps really help what you do with this is then you overlay it to your sales process. Take a look at it. Just
look at how these fit together 9 times out of 10 there's a lot of shaping up to do in your sales process, because you're selling. You're not thinking about the buyer. And and so how do you bring these closer together? Just a little bit closer together will really work?
very key in understanding your customer journey right, and being more customer centric.
Some of the designs I like to think about the plays that we want to deliver here. So. this is very important. This is going to dovetail right into how we make this stick for our teams. Right? Your reps are expected to understand the product. They're selling inside and out right. They got to know your product. They got to know how it works. no matter how good your playbook is at at presenting that, and getting them to apply it, they have to have a deep understanding of it's Cape, your product, this capabilities, your features that takes training. You're going to have to do that. Do not stop there.
Train them on using the plays using the buyer person as and most importantly, how to deliver with the customer top of mind. That's your extra part of training that you've got to develop. So if we unpack just one play, i'll share all this. This is a scale where I work scale consulting. We roll out new plays. I think we do it now. Buy annually. but it's a whole book of plays that we're seeing really resonate with a lot of the customers.

It's usually over 100 customers that we're polling in this, or, you know, have. We've helped design with and we're just taking out the best of the best. So just taking one of those I want to give you an idea of how to design a sales play.
You can ride it all for them. That's fine, but you're not really teaching them how to fish. When you do that. That whole thing of you know, teach a, you know. Give them a fish, as you know they can. They can eat, teach a man to fish. This, so I don't remember the same. Sorry, but it's better. It's better. It's better, but so designing a place to deliver the value as the point. So like, let's just unpack this play really quick. So this is a pre-invent play and here's how we roll them out at scale right? So apologize. I'm leaning in on this. but first
we want to tell our team. This is when and how to use this play right? We've given them context for how to use it. We're giving them some details of how they can apply it. We're telling them the goal. Here's what we think is going to happen when you apply this, this, this actual play. And then here's how you can actually create it or customize it. We're given a little bit of instruction, and we're given. This is a you know it's going to take place over 10 days. So here's the best time to roll it out 2 weeks before you go into an event
that's the best time. Here's why, you know. Let's give them that context. And here's the channel as you're going to use. We're setting our team up with success. If we have proven metrics on it, we want to share that with them, too. This is work for these 10 other people probably going to work for you. Use it at will right?
next. Let's give them the guidelines with flexibility. So what I like to do when we wrote about these plays I love. This format is: First, we're given on the context day one here's what we're doing. And why here.
Secondly, Here is some sample script. You can copy and paste this. You don't have to go Recreate Here's some good copy. Its own brand. Use it right Here's some areas where you can customize within it, and then they can elaborate as they want to on it. I think we always want to remind people to be short and sweet, but let them elaborate. Let them take it to the next level, and then give them some pro tips on it. Here's something else you could do with this if you really have the time. Right? Same thing on day 3
again some guidelines, some reasoning, some sample scripting, and then some pro tips right. Take it all the way through
right. It's a 5 point thing, but telling them what channels to use it on, tell them how to use it and give them some samples. That is a great way to roll out play, because it's useful. They can take it. They can implement it. They can reiterate it. It's gonna save your team's time. by using something like this. So this is a great example of how to really roll out something that's customer value team valued in your plays.
No
questions on this. i'm kind of starting to pick up the pace just because i'm keeping it on time. Here

we had a lot of great chat and collaboration in the chat so, and somebody had asked Carol, you'd be Taylor. We'd be sharing these with us. Yes, all of this will be shared afterwards. in the presentation into Shabbo as well as in slack.
Yeah, and so for this play that you're staying right here. You'll see it in the but we scaled is I'll give you the link.
We put these out again by annually. They're free. It's like a ebook download. You can go grab them there's a whole bunch of them in there. There's more than this play there's like, usually like 5 to 10 plays, and every every release that we do, They're totally free.
You might get a call by scale or something like that. But that's that's all that we would sign you up for.
all right. So aligning with metrics
gonna roll through this relatively fast. so bear with me here. But i'm assuming that a lot of you already have top line metrics here. so one story. Anybody know what these images are from i'm big on movies today. I don't know whether
we might not recognize these images. What movie?
All right, we got a winner all right. Money ball. That's right. so
this this was for those views. Spoiler alerts. is a movie. It was actually a book to based on Oakland athletics baseball team and their use of sabre metrics right? They use the data to find undervalued athletes
determine the highest value impact plays to run, and they replace what was traditionally gut coaching routines. and they use stats to inform those routines and drove results. Now, since this happened, I think it was in the late eighties. Every team took this approach. It has changed the way baseball was played and worked, and the way teams were.
so
let's take a look, and why this is even relevant for you guys today. So
in the upper left. What's happening here? Well, let's let's set the stage here. There's a losing team. The Oakland a's right. They had Larry, the lowest budgets in the League, and they had not the best players. the the general manager was Brad Pitt. and he needs to work with what he's got to create a winning team, right? That's his mission. in this upper left Jonah Hill is an actor here. He was a fanatic who knows how to read the skill sets of the players, and he had all these stats and the plays of their odds, and he was able to look at the Lower Bud Budget players and knew their strengths and the likelihood of them succeeding in a certain situation. He did that with his stats. He did that with data
Right?
let's see.
So
upper right. They break the norm in the trading of how they brought on players. They got rid of some of the best, most highest paid players right. This upset their norm. All people in the or were like. That's not how you recruit players. That's not how this

works. They were Math. This is the scene where They're getting really mad about this. They're not interested in high demand players. They're more interested in putting the right players in at the right position at the right time with the right play. That was all they wanted to do.
Even the coach was totally resistant to these. Like you guys are crazy, right? He was like You don't play baseball with data. You play it with, You know this other thing. This is not how the game is play.
He was he went along with it reluctantly. In the up they went, on a winning street. They rivaled all the highest budget teams in the League. They had the longest winning streak, I think, at the time. and point is, they did this by breaking down the data on what converts to wins on teams by play. They got down into the micro of it right? So that is where I want you to think about. When you think about metrics here.
we're going to lay out some of the basics here. I'm assuming we're gonna that you guys have a lot of this right?
What what results do you want to see that's you know. Everybody wants to see conversions
one of those top lines goals. We're going to lay those out. We already got them in our crm great, if you want more on this Happy to talk with you up to the course. But soon we have this what I want you to start. Think about is who on your team performs best in each area? Do you have a Rock Star Prospect caller? Do you have a Rock Star demo giver. Who are those teams that really excel at one skill. We want to talk to them right. We want to talk to them about that piece.
start laying out what good looks like now? Who looks good on each of those activities, and where they fall in if it minimum or what we're gonna already have our crm set up to track conversions to close one loss sales, cycles, deal sizes, pipeline growth.
percent churn renewals and upsells timed around.
That's one that I encourage everybody to put in their top line metrics.
Those are starting points right. I want you to dig deeper right. I want you to analyze everything you can analyze and track here. This is a labor. This is a labor. You're going to need team members to help get your Bi team involved. Get your robots team, get your sales, ops, team, help them
analyze the stuff that's hard to measure. That's where the magic is right? So identify your micro wins along this way. there was a great course. I'm just gonna drop some of these up here, so everybody sees the list
there was a great course. It was run by pavilion. I took it this summer winning by design and pavilion. They analyze and lay out what's called the boot Time method right in the boat. Time method. what you're looking at is
just a funnel on one side and a funnel on the other right. So Sales funnel coming in, and the Cs. Funnel after the sale. In each one of those funnels there's a whole series of conversions right

prospect to first meeting meeting to Demo, demo to pov, etc., whatever it may be for yours. Those are your micro kind of measurements. You want to make sure you got an eye on all of those because you can impact those. You start to impact 3 of 5 of those you've got what's called exponential growth. They layer on top of each other. You want to have 100. You want to reach 100% in your quota. Great.
Think about how you can get 10% improvements along each one of those micro conversions, and you're going to get there right because you're impacting it. And those things you double the amount of people going into one into your next conversion. You can double the amount of people going into the next one.
That's where it's at right. So how do we dig down into those activities?
That's what you want to measure?
All right. so i'm going to show you how I've done this right? You're not just measuring the lagging indicator. Is that all the stuff we just talked about? How many meetings did we get? How many conversions did we get?
We're looking at the past? That's what's happened, right? How do we? How do we impact the future?
Right? We're looking for leading indicators. Now, you're gonna know here that i'm a big fan of the X model. Happy to recommend that book. I think it's called for Dx. and it's a Stephen Covey kind of thing, but it's basically a way to set objectives and really align to the harder metrics.
I'll tell you one quick story in that in the the whole book is based around this. There's a shoe store right in the shoe store. It's in a mall they're having trouble. They're not able to sell like they want to sell. They're not so as many shoes. They're worried about their numbers. they're in a good high traffic area. A lot of people come in and look at. Choose a lot of people. Come in and try and choose. Why are they selling? What is it? What's going on here. So
in both they sit down and they look. They talk to all their sales people, and they say. what's going on? How do you sell. How do you sell? How do you sell? And they find out that one of the top sellers does one unique thing. They bring up every time somebody wants to run a pair of shoes. They bring 2 pairs of shoes.
and they go down in the basement, and they bring up not just one pair that they wanted to try on, but they bring them Here's your parent heels, and here's your tennis shoes. Try on, both on. Do this, and that person is the highest selling person on the team. So what they do is, they say, great. Let's try it.
Everybody here from now on. When you go get a pair of shoes, bring 2 pairs of shoes up, and they see the numbers go up. So it's an activity that they saw in their best route. They replicated it across the team, and they tracked it, and they saw results.
Here's how I did that exact same thing with a. It was a real estate pro tech company we. I was brought in to work with them
a couple of years ago, and we were working with their leasing team, so they had high amount of what's called applicants people applying to lease an apartment right and

they wanted to release there. but they couldn't impact. They were just seeing low conversion low leases
they weren't sure they had. We had a relatively large team here and so we wanted to figure out what kind of motions we could do to impact that and so I'm. First met with the executive leaders. Why did they think
that? What do they think would help do this right? They gave me their inputs. I then met with the leasing team all the sellers here. I talk with them individually, and as a team we just had a big idea session, and I was like, Tell me, what's going on. What did you think? What are your ideas on a way that we could do this, and a couple of things came out, and it was a couple of members on the team were saying, Well, you know, for every time I call somebody I just want to text them right beforehand, and then right after. So I stay with them, and I I was doing it. Now.
Who else on the team is doing that? Nobody was doing it just as one person and I was like, Hmm, All right. Well, let's put that on the list.
So we ended up trying that just that one thing, and we started tracking. I had to build a spreadsheet and start tracking. We, I think we did it through Zendesk or something. We started tracking. How many text they were sending. We had a rule you had to send it out within 2 h of the of the tour, and within 2 h after the tour that was the rule. So we started tracking. How many people do that if you see this graph here.
what you're seeing is actually for the last 3 weeks where we were applying this, you see that orange line on the graph, how it starts to Spike we were able to increase leasing volume 15 tied to that one activity of texting those 2 times in 3 weeks we saw the policing volume just Spike, and that was the only thing we were doing. We were like nailed, all right. So we started doing that. We added more things later.
but that was how we got to that one activity. It was. It was a great move it way. You can really drill down and give them actionable ways. Your team is going to love that just a little bit of micro improvement, and they can get a long way with them.
All right.
keep an eye on time here anybody
have a question or want to enter Jake here before we keep going.
Got 3 more kind of that key areas.
Yup, please. vocalize it. I think we're good. Okay, so State code or by an expectations. Last week we talked about. Buy in right this week slight slight adjustment. Not a lot. We don't need to spend a lot of time on this unless you have more questions on it. but
everyone in your org is a stakeholder in your playbook bill. Just go ahead and call it that. Everybody included your tech guy, even the guy or gal that's maybe helping clean up the the the the office afterwards, because they could lose their job, too, if we don't do a good job, right? So everybody is a involved in this

stakeholder Expectation, who's here is cool with us, saying, yeah, we're gonna generate 18% more revenue just by putting in our sales process. You guys cool with on that.
Yeah.
make you a little nervous. Maybe I don't know
it it it could. I could see that
look
same thing as before.
You've got a lot of us have 5,100 targets on our head. We have to improve sales or grow sales 100 or 50 in a year's time. we just keep an eye on that. That's great. We've got to have these micro conversions. We just talked about that you improve little things by 10%, those exponentially they help you reach. That's how you get to the 100% growth.
so this kind of putting process in here is not a shocker to me. Of course we can do that. So how how we implement it. It's going to be important.
Last week we looked at this wheel. This is my influence. Wheel when i'm building out a playbook. I've got 3 kind of layers right. I've got my builders. I've got my influencers, and I've got those that need to be bought in 101
use the same thing here. We're going to actually thinking about outlining our steps. We want to share that. We want to talk about how our playbook actually ties the company goals. That's important, not just for buying. It's important for everybody to understand. This is why we're using a playbook. We wanted to determine who's going to be involved. They all need to be communicated with marketing team especially. They're the ones that are going to help you deliver content and change that content. They need to know
that this is actually being implemented in a way that they are in support of. This is how you get their support. It's good communication right? use this as an opportunity to set expectations with everyone in this chart.
We talked about the play last time, the stakeholder by employee.
I can. We can use the basically the same play here. I'm just gonna run run through it right? this is sorry the smith popped up here this is Has anyone as I'm Curious, if anyone's actually use this to please drop it in the chat. If you've started using this play from last time. But
step one getting to know everybody. We've kind of done this, and what we were just talking about. We're getting to know our customers. We're getting to know our people in our or we're getting to our team our stakeholders and buy, and so you can cross that one out. Assuming you've done it right. We're creating a cadence on how we deliver results that's not just to our exist. Hey, guys, we I play book. We're doing Here's the stats on it, and we want to share that with everybody. Right? We want to create a case for sharing monthly. Here's what we're doing. Here's what we tweet Here's how it's working. Let everybody know
keep them updated on it on the success and failures of it. Right?

The what's working was not support it. Don't leave it out. Start small, demonstrate those results early. Don't think about tackling too much
and then share those results as much as we can find your champions and circulate that use quarterly business reviews, use sales, kickoff events, use recurring meetings to champion the people that are doing well. It's much better than pointing fingers and saying, you didn't do it. Take the ones that are doing it. People want to level up, give them something to look up to into benchmark against. They'll go after it
all right, so that's all I want to spend on that happy to go deeper. I'm just kind of move fast, because I really want to get to these last sections here. This is how we make it stick You' this is 100% where it's at
Your number one stakeholder speaking of that is your team right? The team will be using your playbook if we don't an account for their needs. The playbook won't get used. If your playbook doesn't get used, you're going to have a hard time establishing consistency in your program. You're not going to get the repeatability that you want. and eventually you're going to have a hard time of scaling.
This is where set.
So
last time we talked about packing what was needed. anybody remember that kind of as a theme here?
there's a lot of things we went through processes, strategy, things that can go into a playbook. We went through resources in an intel we went through performance and enablement i'm already getting tired looking at the list right. We Haven't had another slide with a ton more right. These are all great things to put into your playbook. but treat it like a backpack
pack. Only what you need instead. I even think about this pack only what your team needs right now. What do they actually need? What are they gonna use? And let's look at it from that lens. Stop! Get out of your performance management and yourself for a second, and think for your team.
So here's how we do that?
What's the number? One thing we know about our team that is contributing to sales? That's a discussion question.
We're bringing our team together. We're having an ideation session. And we're talking about
what's actually moving the needle.
Who's it moving it for? Who's our highest seller right now? How is this helping them right. What are you doing? Are you bringing up the 2 pair of shoes? Awesome. Help me understand what's working? If you can't find it, then start to look for it right. Get your team looking for it. It's like finding a needle in a haystack, getting everybody kind of keeping their eyes. People.
What are the reps struggling. With
that we can help put into a playboard if they're struggling with objection, handling, and they're not doing a good job, and they're dropping it there. Let's make sure we

help them with that. If they're not do, if their demos are second and we're getting people hanging up on us or prospecting. It's just not breaking through, and we're getting a 1% connect rate.
Let's fix that. Let's change the places where we're falling down. That helps your team. That's what they want to see. They want to see you come into the table and helping them Stop, be humiliated on the phone for a minute. You know. How do we do that? Let's put that in there.
what improvements do we need to make in order to win more right? Where are we winning? Do we not have that one sheet that we've been asking for? Do we not have a good demo? Do we not have a a scenario that we can walk 3 people in an instance on how this works? Are we not able to articulate that value? Prop on how our doors save contractors time, or how our door locks can save contractors time. Let's make sure we're giving that to our guys in a way that they can reproduce and tell it right. How will they impact our objectives, and how? how would these activities impact our objectives? Let's show how this fits, hey? We do this y'all we do that we can. If we communicate this story, it's going to help us convert more here, and that's going to help us get to our 100% growth target.
right? We need to connect the dots for our team. Show them that this activity will lead there.
So here's a great way to think about how to lay these out.
You identify. We ask these questions. We have a brainstorming thing with our team, right? We get some of this idea. Now we've got a list of a whole bunch of stuff that maybe we want to incorporate. Okay, still a little long. We could go develop all that. But what we should know develop first.
Right? We're not doing this in a vacuum. We're getting everybody involved. So now, but it's the number one thing that we know is contributing to to sales.
Demos. We get some I on a demo. We see that they're doing well with it, and we've noticed we convert it 60 off our demos. Okay, how do we do More Demos? Can we get that? 65 70 conversion off our demos? Let's look at that.
Let's take the plan. What needs to go into the activity to increase our demo performance. Well, we can talk about presentation strategies. We can talk about presenting our value. We can talk about sample messaging. Maybe they some better messaging and benchmarks in that. Maybe they'd even be able to speak to the product benefits better. Those are things that maybe we need to improve in our demo quality. So now we've got some actual things. Then what does that tie to that, and ties to that demo conversion to get the pov or to
it to the nda right great. Let's make sure that we've tied that we're looking for a result right there. We're not looking for it to change. How many sales we sold in the year that's too big. It won't show up on the chart
right? We're looking to how many people we got to actually convert out of that step. Can we take it from 60 to 65. Now we know we're doing something right. That's a

great way to look at how to align this for your team and keep it really so that you can for portal results. Here's another example.
qualification. Let's say we're doing a terrible job asking questions in this.
Let's develop some sample questions. Let's look at qualification frameworks band med pick. Maybe we need to implement some kind of methodology. maybe we need to look at common fit indicators. How are we fitting? Is this the right customer. How can we kind of get them out of the picture earlier? Right? How do we kind of cancel these out? So we're not spending so much time with reps that you know, with customers that have just been dating his own, because we weren't asking the right question.
But you know we know that 90 of them are never going to become customers. How do we reduce that? Right? Let's put in some ways to do that. What's that going to impact. It's going to increase our win rate and and have them less time per customer that Aren't going to buy right. Those are 2 metrics we want to track in that. They're hard to track. We're going to find a way to do it.
We'll be able to show the 3. Put
do one more, and then, happy to talk through on this super important. But i'm hoping this gives you a framework.
and i'd also be really curious if you like a template.
All kind of doing this. This is how I build on. We start with the brain work brainstorm sessions, and we come down to these granular levels, and we're starting to line it out so increasing inboundly conversions. That's always a big, you know kind of initiative. Where is that going to fall on our priority level, Can we increase that? What is it going to impact and so forward over to the expected result? If we increase inbound lead conversions.
it could actually increase the conversion rates across several different junctures, right? Because we got more coming in that are better qualified that are better inbound kind of leads. Okay, cool. Maybe that should be our first priority, because it impacts it's actually going to give us more volume to play with here. So we want to prioritize, based off of these kinds of impact statements.
Questions on this
feel free to do. Yeah, feel free to raise your hand. If you have a question that you'd like to pose to Taylor on any of this
seeing some great stuff in the chat.
reminds me of a kindergarten class. I like it. Okay, all right. Oh, that's good. Well, you know. I think i'll learn mom. The most in Kindergarten. All right. So
keep moving. Here. Success depends on usage. Your teams don't use it right. How are they going to do it? So here's some things that we want to make sure that we are including where we can right. These are the most frequent areas that I see playbooks get utilized situational place that play that we looked at from scale. Going to send you a whole book of those great things to include. Make sure they're situational into what your team does with. Are they bad at? Follow ups, give them a play to use right,

give them multiple plays to use them, follow up, give them nurturing place, right? objections and talk tracks. Don't. Just tell them the objections that we often get asked.
Give them answers that they can also give them multiple kind of ways to address that. Take it from your bestsellers. Who's doing that best. Let them inform it right. grabbing. Go content. Samples I love this huge time saver for your team.
Grab right the snip it out. You can do this in some of these automation programs. Now you know. What is that value? Prop what is the other piece? Go and write it out. They can correct, copy that and drop it in an email, make it something they can reuse over and over and over and over, and they're not having a word, Smith, that you know
kind of use bad email writing skills to to get it in there. That'll save them a lot of time, too.
So these are some great ways to do it.
Now we're going to look at designing for usability. This is another key point to making them stick. Right. how are we doing this?
These are just. These are just kind of pro tips. Here. We're going to run down on them, Keep it short and sweet. Break the content into sections. We talked about this last time.
The All this content is a lot. Break it out. This is your buyer person to playbook, that's all you need. and that have that referenceable. It can still be in the larger repository, but break it out so they can use it. Make it into cards. You talked about that little playbook what you call it a pocket, Guy, just give him the buyer personas as a breakout of that. I wonder if more people would use it. Hey, quick! I'm on this kind of project manager call what are the main things that motivate them? Oh, yeah, Cool. I've got that right in my hand. Right?
focus on the most actual information right, very key here. Sometimes we need, you know, details, instructions. Look for ways to separate some glossaries. Things like that. That's okay. Break it out for them. Right?
diversify the formats on your team. This is super key.
I see we have more opportunities to this. You guys were talking about? Do we do many playbooks do we develop videos? do we put it in that? Lms: yeah. All the above whatever's gonna work for your team here. and what they're going to do. Let them inform it. How do they want it? Let them tell you. You know there's certain things you're not going to be able to do. Maybe you want to do a VR. Experience so that they can do role, play in VR or there's a new AI kind of role play thing that
tract your calls and gives you feedback right after. Maybe you want to experiment with some of those things. What are your reps want? Right? Ask them. Bring it to the table, Forum
number one. The point here is, Don't, build us in a vacuum.
Don't. Just assume you know what your reps want.

and then find ways to make it accessible and numerable. Right. So champion building is huge in this, but beyond that there's some real ways now that we've never had before. Apollo, I think I mentioned fluent as a favorite one of mine you can build in Once you have your playbook, build it into your crm, so that it moves through the stages of their deals. Deal, flow, and follows them along right so it'll meet them where there are
right.
we got 10 min left here, so I want to try, and I want to make sure we get through this key point. Good plays enable reps right.
They enabled the Reps to engage with the right people
enable reps
with the right information
the right time.
That's the whole point of this whole thing. So when we look at our place, how do they give them the information that you use at the right time
we're going to use personalized content plays. These are just ideas on ways that you guys can develop plays and look for what your team is. They'll tell you what you need. Lead, qualification. Demo place, multi-threaded plays, prospecting plays closing plays. Follow up place.
buyer, intent and nurturing place Those are different right I see a lot of people just using a follow up play, but really they know they're not going to buy for 6 months, so the whole play drops off after 2 weeks.
You law, you're going to lose right if somebody else is going to come in and take that opportunity from you.
so how do we nurture them? Right? Is that marketing role? Is that sales as well? Well, it's in your court. I think that that needs to be communicated. Lay out those expectations. how do we develop those nurturing place? I see a lot of people drop the ball on that just because they're not ready to buy. Now they lose the deal in 6 months.
so developing these, this is a list here. happy to talk more about this and answer questions after we're going to put together. I'm going to send those links around on all the plays that we use. It scaled so that you have those. But these are just some examples of those
regular updates are cure our core to this usability. So I don't want you to to forget that. this is how most people do it. Right? You've got your playbook. You've rolled it out. You've done your training. I heard a couple of people on the call that have ongoing revisits. That's the way you get in there.
Checking back in a few months. How has been useful? That's the way most people teams do, or most teams do it.
You want to? You want to excel this? You look for how to spotlight the users that are actually implementing it. You call them out, you take their place. You stick it into the book, you take it. Hey? This is the winning play this month.

Going into playbook right. Make them feel good about that. They're gonna want to participate in that track. And and when they're how and they're using it, and then bringing that back to them. Share those stats with them. That's how you excel this right
ongoing coaching should be your new mindset. If you're not doing it, you need to look for an opportunity to do it. There are tools. There are AI coaches that you can just build in there's coaches. I I heard forget who was
Ashley, maybe that you said that you were a coach before right? and now you're working in this and kind of enablement here. Bring that to the table. or need this more than ever. They're reluctant to invest in it. But you can show how this actually will impact the bottom line.
Here's the last part of what we need to discuss today.
You have to lead by example. Remember one thing from this course.
Most people don't know how to use playbooks.
Now that you do, you need to lead by example, Bring the playbook to the meetings right. Show them how you're using the playbook, Develop the playbook for yourself first. This is how i'm rolling out. This is how i'm meeting with you. All this is why right? Show them that they're You're running up that all for that. It's a great way to implement this
You can reference the playbook. I like to bring it to the my weekly team meetings to my huddles. we talking about it, we're saying, oh, what play was that? Oh, cool! You're running. Oh, that's great! You know we're. We're using it in the meetings right? share it with the the team rebels and and outcome the team leaders and the rebels. I think it was last session, Irene, or maybe
Sarah, I don't. I'm sorry, maybe. Who was? But somebody asked a great question about how do you get loan wolf sellers, those ones that are reluctant to, you know, to kind of join in this process, and they're saying I got everything covered. I know how to do it. Let me do my own thing. Anybody. I want to call out who that was.
I don't remember who it was. Sorry.
maybe i'm maybe i'm.
They're not on the call today, anyway, for those resistant to come on board. Here's the trick. I'll call on them first.
Right? It seems like
it seems like it maybe is not the right move
telling you it works.
Pull them aside. Say, hey, look that we're building out this playbook. You're great at what you do. I really want to get your input. Tell me what plays that you would like to see. What content would you like to see that would help you. What do you think would help the team get their input Put it in the playbook
if it doesn't perform it Doesn't. Perform right Doesn't help. That's fine. They'll. They'll see that before you even have to call it out. Don't even need to make a big deal about it. But get them include. Let them know they have a voice. They're gonna be more

receptive in it. Most managers will just kind of take that and say, all right. You do your own thing. We're going to do this over here. I encourage you to include them. Bring them in earlier. It actually works. let them have a voice in it, and keep them involved in it.
Those that are reluctant, and those that are kind of stand office to it. They just need to be brought in and included, and know that they have a voice in it.
Driving adoption right?
These are kind of just a recap on this as we walk out here, you'll
get scientific. Got a measure, and how you analyze. Do it early. Do it often. Share it as much as you can
don't start too big. Start with things that you know we're going to have impact.
You know your team needs draw it to the result. You're tracking and look for incremental small, gross steps that you can report back on. I move this conversion rate up 5. Now we're going to build this next piece and move that up 5 great that's going to give you the momentum you need to keep building.
and the good looks like the team sharing their ideas without you having to force it on them. Right? You can create that environment by leading this by example.
one more here. somewhat effective. I want to get some time.
if you tell people how to manage their playbook and you say you gotta do this, gotta roll it out. I'm gonna down score you. If you don't, we'll put you on a pip.
Okay, that might work it's gonna be effective.
This is more effective.
You actively coach them. You bring them in, you find out what the individual needs. You make it part of your day to day. You demonstrate how to use the playbook. That's how you make these co effective. Right?
All right. I've talked a lot here. I tried to move through it, but we got through all the material
this is what we covered today. This is what we're covering next week.
Got 3 min left. Anybody else want to ask some questions or chime in
I appreciate you all listening.
Thank you so much, Taylor, and for everyone that's still here. If you would like to come off mute and ask a question as we wrap up. That would be great.
I'm going to call on Jacob Pain Jacob, you're in the middle of a playbook. Build
if you're on here and you're i'll see you on there listening.
How's that going?
Anything to share.
Yeah, it's going. Really. Well, we've kind of just started kind of building up the framework. We have
a deliverable for our our private equity leadership and the board at the end of January. So we're trying to get through quite a bit. And
as I started just working through that framework, there's there's quite a few things that I've realized that we we just don't have documented in in some typical sales

situations that that occur, you know, on a just regular basis. So it's it's been really helpful. And
i'm glad that the the timing aligned with this course and and kind of our need to to build one of those as well.
awesome, awesome. I'm excited to hear how it's going, and for I think I heard several other folks that are mentioning building their playbooks now, so love to hear how it's going. Police share back with us. I hope this has all been helpful. and that's really great that you're taking the course, while you're building so
wonderful
any other questions we can wrap up and just want to thank you, Taylor, for an amazing second session, as well as everybody that joined us today. We're looking forward to seeing you again for our third and final class next Thursday.
Absolutely thanks everybody. great session. And Taliesin. Thank you so much. And for 1 billion team for making this happen
so welcome pleasure is ours. We'll see everyone next week.
bye.

Class 3
text
Hi! Everyone welcome.
hey? All
good to see some familiar faces coming
coming very familiar here. I like this. I appreciate you all coming
coming to all the way through these sessions here.
See Kristy, and rich.
awesome Hannah
Hubert.
Glad you you're here.
Me, too. This makes me so happy. You've made friends, Taylor, and they're consistent, and they're here, and they're showing up. I love it.
Awesome. Jacob.
How's the playbook going? How's the how's the buy end going, Jacob. Anything to update on?
Yeah, we're we're working on it. So we have a couple of meetings in the next next week, just to get some buy in just from you know, the different levels of the organization. But just in our kind of brief conversations with some of these these folks. they're They're as excited as we are. So it's good.
Oh, good! That's always good. That's a good someone, you know.
That's a that's a big part of what I want to kind of talk to today is the
the emotional buy in you know you get. You have to get that internally, and sometimes you forget about that part, you know, getting everybody excited about something.

Well, this is my absolute favorite thing. When i'm on a zoom call when it goes to 2 pages. That is awesome.
okay. So we're just gonna get started while the last couple of people are rolling in. so Hi, everyone! My name is Kaylee I'm. With Pavilion University, and i'm going to be your host today. welcome back to the third and final course of creating, implementing a sales playbook that sticks.
so since this is the last class today, I have a few announcements, so I just wanted to run through before we get started.
So there will be a final exam for this course. it's uploaded into Shevo already, and it will be ready for you to take after the class today.
You have 3 weeks from today to complete the exam, so that will be on January fifth is when it's due.
the exam is all multiple choice and true fall statements, so no stress there. I I know that the short answer questions. They can be scary. So. No, it's just all multiple choice and true fall statements. but you must for at least an 80% to pass. But here's the great part.
You can take it as many times as you want, and it is all open note and open book.
So we'll be sending out further instructions. and any clarifying questions through slack and email. but please let us know if you have any questions about that
or anything else about the final exam. But with that being said, I think we're just gonna go pass it over to Taylor and get started today.
Awesome? Yeah, we we we went.
we'll say we went easy on the exam, but I think it's it should be just a good refresher for everybody, and please, you know, feel free to ping me if you have questions about things in in our in the exam questions, or if you have trouble on anything, i'm happy to
to to help walk through things again with you.
cool. thanks. Kaylee.
the let's see. I'll share my screen
hold on 1 s
share, and I don't want to make this.
Let's see
that's better. All right. Cool hopefully. Everybody can see my screen. We're good.
Yep. Looks great.
awesome. Well, we're gonna jump in if I can. I love giving time back and everybody's schedules especially on this we had a jam-packed. I felt like we pushed it right to the end last
last session. And so give us a little more time for discussion on things and some case studies and stuff we can look at today. but
curious. You know we've covered a lot session one we covered. You know what needs to go into building a great sales playbook. We rolled out that 5 pillar kind of strategy that I use

provided the template on that on how to create a effective playbook. and then in session 2 we went deep into how to really make playbook sticks. I know that that was a big part of what Joe wanted to see out of that.
curious. Did you feel like you got a lot of kind of memorable things out of the last session? Are there things that you're already trying to play with? You have questions on on what we went over last last week.
Don't be Sh. Now.
Okay. So nothing, nothing sticking. All right. So that's a good point i'll take back so I did hear one thing. I think it was from Patrick Santiago. Patrick. I don't know if you're on this call today. But, he ping me you know that
the part of the the content around why playbooks fail was very for helpful for him. it sounded like, you know. Patrick had gone through several playbook launches, and he was like Yep, that's why that one didn't work. Yup! That's why that didn't work. And so now, just knowing where those pitfalls were, was a big help for him he's built it sound like he was building a new one with a new team. So Hopefully that's helpful to him, hopefully, just knowing those parameters and where you can go wrong
is a good guardrails for everybody. So
the biggest takeaways from me. oh, yeah, I see a hand up. Go ahead. Who is that?
Russell. Yeah, thanks. I'm actually in Wisconsin drafting our Company's first playbook right now. And what I've been reflecting on is how to make the playbook
an active document such that our sales reps actually need to kind of commit to things in writing
a and and use the playbook actively rather than as a reading resource. So like a quick little example is our our high payoff activities section of our playbook, where I list out what they are for our field reps.
But then I challenge our field field, reps in the playbook to score themselves relative to those high payoff activities, and then admit to this quarter. This is how i'm going to improve running at these specific, high payoff activities, which I feel are opportunities for improvement for me
that that's like E. For us is making it like
action, not just reading reference.
A 100. Do you bring that up in? We talked a little bit last week about how to use those in recurring meetings. I love the scoring system and letting them score themselves. Are they? Are they scoring each other? Do you kind of have that
peer-sharing, hey, look at what John did, and how he he nailed all 3 of these points. and then people can go and listen to that call is that something you're incorporating? I I think that's a great idea right now. We just have it as a at least the ideas that would be a a rep manager relationship where the dialogue would really be kind of there not peer-to-peer but I like that idea, because Peer-to-peer I think is in many sense, is even stronger.
because that's a 100%. It is. Yeah, that's where it's at that's, if you can. If this manager led and directed.

there's always going to be that tendency to kind of but the system, you know, and just like, yeah, I know i'm supposed to do it. But you know how do you get their peers kind of doing it, so that they're wanting to take that action and saying, I really like what Rebecca said or John did on that call, and I'm going to incorporate it. That's that's what you that's the
the emotional kind of bind that you want to have but one among the team harder to to to get right, and you can't force it. But getting them to put up those calls so it take that scoring system, maybe add scoring across the there for each other, so like how well you know
you call it out and say, I really like what Rebecca did here, and I love these 3 points. She's nailing these 3 things. Here's my feedback on where she could improve. And then what do you think, team and do maybe one of those a week, or one of those a month, whatever the pacing is. But let them score each other, and not not to be brutal with each other, but you know, to give that feedback, and they'll start stealing each other's lines.
I love that it's a great point. Thank you. No, I appreciate you bringing up. That's a really. That's a really good way to like. You gotta get this actionable. I love the scoring system. That's a great day to day tool to use Take it and let the team play with that more. You know
for me the biggest takeaways from last week. that you need to find ways to teach your team about how to use the playbook. So that's a great example. Right? and you have to be the leader in demonstrating that. So again, you know, to to your point, Russell like if you score them kind of first
versus just asking them to score themselves, Score them first, and then call somebody out and be like, you know. Hey, what did you think about this? Let's score, or maybe pair them up in different ways, so that you're demonstrating your use of it. They'll start using it more right if you're not using it. They're not going to use it. and then you know that that gives you more practice into that day to day
bringing it into your meetings, bringing that back up talking about scores, talking about what you learned.
just making that part of it. pulls it away from, like you said a reading resource. so I love that.
so this let's see here.
here we go. Today we're going to look at how to future proof these right those are how to make. We make them stick right. We talked about what goes into them, how to make them stick. Now let's look at how to future proof, When I talk about future proofing. It really is about strategies for change Management
changes are going to be continual in this game. How do we address that? How do we make sure our playbooks? Don't, become obsolete? That's one of the big reasons why playbooks fail is that what we built
early 6 months later things have changed. Did we update it now? It's not a even a good reading resource, right? So we're going to look at some ways to make them

flexible and adaptable to your market conditions as they change how to adjust the messaging. When did it adjust that to buyer personas and based on buyer intent? Specifically, that's always a shifting landscape. How do we adjust towards that? We're going to look at questions. You should be asking to inform those pivots right? That's a great place. First place, to start.
Think of it like the or how we get teams to run discovery and qualification.
It's really just all about asking good questions. Let's ask good questions towards our playbook structure. Let's ask good questions towards our process, and if we continually ask that, we'll be able to catch some of that. So we'll look at once. We ask those questions. What are the recommendations for implementing those pivots, and how to address those changes
to really drive by our behavior. all of what we're gonna look at today. I just want to keep as a theme for you. it's gonna help you surface the actionable information to bring marketing Cs and your sales teams into lockstep
that feedback loop, keeping them working together, not separate in silos. and when we use this, you know, when you're able to do that, you're actually able to deliver a premium buying experience which is the end goal here, and then you can use the rope. The playbook is like a roadmap. Right
sound good.
cool, all right. So
one of my favorite quotes, I don't know if you you see this a lot. But hope is not a strategy. It's a common phrase. I see it on linkedin all the time throwing around Rodrick Jefferson, who is somebody? I really admire his sales sales enablement kind of a philosophy and books. I think he uses this like a mantra.
I think it's also a book by Rick Page. this actually the title Hope is not a strategy. so I was a little surprised actually to find out this is actually a James Cameron, the film director quote and this is the full quote on it, you know. Look is not a factor. Fear is not an option.
how do you? That really leads everything back to process? How do we design around this? So I really like to remind myself of this quote, especially when i'm in a challenging kind of change management situation, and that's ongoing with your playbooks. Right?
So
let's start with anticipating that change markets change. That's going to be a constant let's go ahead and embrace that. Let's don't be scared of it. Let's embrace it. I don't want to date myself here, but just to give a kind of consumer model who anybody, remember what it was like to go and pick out a video at the video store. how much is that changed? And just like, All right. So I use it's been like Friday nights, you know, like as a teenager in the blockbuster picking out the movie. Then that changed the DVD: then what happened to Blockbuster right?
Just faded away. They didn't address the market change. Everything was going online. Things were getting easier. Actually, it was the Netflix shipping model. I think

that took that over buyer intent buyer needs change. I Personally, I don't. I like the ease of picking out a movie, but I thought about it the other night. I was like.
Wow, there used to be such an experience in going and getting the movie from the store, and then you'd spend time in there. You'd learn about new movies, etc. So, anyway, but that's changed right. Another way to look at this, and I I know I have a lot of analogies here, but
has anybody been in a her game.
Russell. I see a couple of hands. I I used to live in Charleston, South Carolina I've been in one.
I like this example, especially when we're thinking about market changes. You know why? Because, typically there's some for warning in a hurricane. They're more similar to a market shift than a tornado, the surprising or an earthquake that you didn't know was coming right.
You can notice the change in the weather patterns, and you can see that before building, you know, for a hurricane makes a landfall. That means, you can prepare for it right. You can board up your windows. You can get a generator or water for what happens after You can even leave town to escape harm. Right?
with your business. You have a similar opportunity to watch for those weather patterns. What's happening across your businesses ecosystem so you can prepare now that you you know, if you're implementing all the things that we've talked about here. You have data. You can watch those the data. Don't. Just look at it and be like we got data
we got. We can watch the patterns from market shifts. Right? You're not watching it necessarily every single second. It's not like a stock ticker, but what you can watch is for these patterns. You can zoom out. Look at things. How is markets shifting? And you can see the patterns on how buyer intent is changing? Right. You're going to get that live and your feedback, If you're working with your teams to.
and you and your managers, you can scan for their signals, and now take informed decisions about where and when you need to pivot right. So
here's a few ways to kind of look at that. you know there's the changing in the buying habits. Right? You may do address how you're selling. You may need to reduce steps or barriers to purchase right If there's changing and buying habits, people want things faster. They won't. They move from a. DVD. To an online model, right changes in customer pain points. This is going to inform how you pitch your value, prop and your messaging, and what needs to change there, right you're looking for.
If my customer pain points being solved in a different way, and they change. Are we asking the right questions? There? Are we seeing a shift right
higher value, perception, and their objections.
you know, cost is a big one here that I see. Come up, and you know we don't have a problem with calls. People are happy to pay this rate. Well, that may. That may change right. They may shift

and as new tools enter the market or economies change, maybe the Cfo or they they're not. The utilization of your product does become too expensive. And there, now you're on the top of the kind of chopping block to getting cut. How do you anticipate that? How do you watch for that? Right? You can see it coming
blind spots that your customers didn't even see coming You're gonna be in a situation. Take this whole Covid situation, where, like there were customers being affected by it. And how do you actually help them? Becomes a new question right? I don't even know how to help this customer right because they're going through something. I've never been before. We didn't anticipate so be prepared to not know everything, but watch for those blind spots. And just look you're we're going to talk about this a little more today, but like finding that that
empathetic space, and that becomes a relationship kind of partnership and a new way to look at it. You both don't know what to do. Let's work together right? Balancing between understanding needs and empathy is a big part of that. You know that that's that's kind of spoke to this year, but the relationships are going to be tested, and if you look at it as an opportunity to build trust, then that's a whole new way to look at relationships. How do I build? Trust not just sell them something. But how do I build? Trust in this environment to keep them engaged with me? Keep them on, so they're not leaving as a customer or looking somewhere else
for new opportunities to fill their gap right. If we can anticipate that
communication channels. This changes all the time. I am.
I just did a study with scale consulting, and we had it come out. It's a great one. I'll share it with everybody else around. Buyer intent. It was that Webinar we ran. we have it's in the playbook that we put out if you've seen that. But you know it's a May. It's amazing like. Linkedin is a great selling channel. It. It is totally now becoming saturated, so selling channel to where there's new selling channels that it popped up. You know people were even selling through tik tok, and different places right are using that to their
manage as a communication channel. It's amazing how many people never adopted linkedin in this. They're still not.
Don't have their sales teams on there. They still aren't putting plays into in communication through Linkedin. That's really happening, and that's kind of crazy. But you gotta watch for those new communication channels are. Where are your buyers communicating. You need to be there right
and last, but not least, I think budgets. They're always going to shift. They're going to go up and down. What's not going to change is your need to sell and actually hit and perform at the highest level. Right? That's always going to be there, even though your budgets have gotten smaller. We've all heard you got to do more with less.
so these are coming to some of the kind of signals that you can start to look for and anticipate this change, and just keep in mind here.

When it comes to playbooks we need to not only anticipate those changes. But we need to anticipate the overhauls for our sales, teams and our processes. Right. Are they in alignment with our company mission and our vision?
we talked a lot about that through this course. But it's amazing how quickly your day-to-day objectives
They just fall out of sync right. They fall out of sync with your company mission for a lot of this things that we just talked about, and anticipating they can just get a little out of whack. It's not necessarily huge shifts that you have to make here. Think of it like a chiropractic adjustment. I go to a chiropractor sometimes every week when i'm when sometimes I take breaks. But but it's like you, you you weren't necessarily doing anything wrong. But you. You were working out, and you tweaked something, and now you need to get back in alignment.
It's very similar to that Just
course correct. We talked about direction as one of the pillars here. That's your course. Correction. Are we still in alignment with our company? Mission? Has something shifted. Maybe we just need to adjust that value. Prompt right? so these are some of the areas in which we may want to make those kind of small tweaks. realigning with the Company Mission statements. That's a huge one. How has it changed? How we we, how can we pivot or need to pivot to make sure we're back in alignment? Emphasizing net revenue retention? there's a large focus I work with so many sales programs where it's just sell new new new new new, and what you forget about is what about all this customers we won last year. Can we grow them? and Cs teams are just helping them get, you know. Get day to day, and we're monitoring. monitoring, maybe adoption and usage and utilization across our product. But we're not taking advantage of that. It's a massive re a revenue, source and we're going to do a case. Study here right after this on it. But it's that. Keep that in mind like, how do I grow my existing customers and get more revenue out of them. Get them using. This. More trusting is more. It's a huge segment that gets you know, loses focus right? So
that means account growth. When is the right time to pivot to that, you know. Move? Maybe you're moving frontline sales, teams, and outbound teams over to account growth and land and expand right you're creating that program. What does that playbook look like? Is that a whole new playbook? Maybe maybe it's pulling this over. Maybe you're delivering that? Cs. But that's a whole time when you might need to create entirely new playbook or more material. what does that look like for new hiring.
What does that look like for training those new hires? Is that a totally different scenario? Do you have it covered in your current playbook, right?
I like to use the word proactively here, but looking at your value props, and being proactive about them.
don't be surprised. don't get called off on guard. Well, yeah, well, that's not important to us anymore.

Your sales team, you know. As Russell, I don't know what's in those those questions they're asking, or how those buying motions are looking. But you know this is a big piece, right? How are those results tracking for your customers? How well is your product or service working for your customers.
Make sure your reps are asking that question and bringing that back to the org. how are your customers customers doing? How is their customers business doing? Are they in a good place? if so great, how is our value still contributing value? Has that changed for them. If not, how is our value still contributing for them? How can we do better? We want to feed that back to product. We want to feed that back to marketing. Right? Very.
Your Your your sellers have those relationships, Don't. That's a huge better than selling. Sometimes it's getting that information and bringing it back in and then acclimating your teams to change. This is a big piece here, right
Sometimes, you know. Take a Covid situation. I saw teams completely fail, because that was such a shift in their whole selling motion and their buying motion that they basically lost all all motivation. They lost all faith they they lost their direction, and they failed.
and they went so under the companies that went out of business as significantly during that that period right? and it was because they weren't prepared for that level of change. I don't think any of us were but but getting them acclimated to change. Look for that. I love running what I call like a quarterly fired, you know. Program right. Do a market shift, simulation. Take take like a hurricane drill. Right? I'm going to remind you of this through this course. But
a hurricane drill when you had to get under your desk, or something, or at least I did. Maybe that was earthquake. But anyway, but anyway, the idea is like, run that kind of drill and do it maybe quarterly, maybe every once or twice a year, or something, or at a sales kickoff event that becomes a fun interactive event. Hey? There's a there's a crisis here. Our our buyers are not buying from us. Let's go ahead and inact that let's let's run a simulation right? That's how the army does that
they run simulations day in and day out, on scenarios that could happen so that their teams are prepared. You can do the same in this
So I want to look at an example.
You know I mentioned in our and growing in our and having that as a focus as a shift in, maybe how you're approaching markets net revenue retention. Right? how many of you? I'm just gonna do. If maybe we'll do a show of hands here. I don't have any polls set up, but i'm curious
how many of you is that your number one kind of goal for this year? Next year looking forward. Anybody want to raise their hand and talk about how they're They're really focused on
revenue retention and growing that.
Okay? yeah, it's yeah. So for us, you know, for for probably 6 years, or like you had mentioned Prior. Our Our drive was just to get new business as as much as possible.

and you know, once once private equity came in, there is that they push for that that revenue retention, and so it's not our number one goal this year, but it is our number 2 goal For what we really need to do in in order to kind of build that revenue across the board.
I love that. so. And that's Are you building your playbook with that in mind? Is that like number 2? Go right?
Yeah. So we're it's an org chart software. So it's for chart now. and so we just kind of do organizational planning and and workforce planning with that software and just kind of automate the process.
Gotcha. So are you. Are you familiar with Mondaycom.
Yeah.
I thought this was an interesting thing, and this was
literally i'm i'm pulling this from someone that I that I I admire kevin to he's an investor and co-founder, and the company catalyst and so i'm not working with their teams. But I saw he had this post around it, so I just kind of wanted to share it, so call it a a mini-case. Study here, and I put my my tidbits in it. But you know monday.com They crossed a 550 kind of 1 million dollar AR growing growth rate this year.
right. Their Their stock has barely been negatively impacted in the last 2 quarters, especially whereas other tech stocks in their segment have fallen significantly right? so this this these stats here that i'm laying out are actually from a press release that they had.
and they have a focus on increasing the value and revenues within their current customer. Base right? It's an apparently it's a number one focus point for them, because in the press release it's all they talk about right. They have a strategy for this that's embedded with their teams
and the likelihood that they're using plays and tracking data intently and making pivots based on those informed decisions is pretty evident, and you don't just come across this right? so let's just look at a couple of the the kind of successes here from their press release.
That dollar retention was was over 120%
dollar attention rate for customers with more than 10 users, was over 135 that's taking their biggest net drivers there right retention rate for customers, more than 5, with more than $50,000, an annual revenue from them that was going up by over 145 right.
These are huge numbers that they're putting up and so notice that the net, dollar, retention and customers and adoption were mentioned consistently nothing else. This is from their press Release nothing else. They're talking about new business growth and these kinds of things right so highlighting their customer obsession, and the North Star metric of Ndr. For the public market is no accident.
Their existing customers are their growth engine right? And you can see the value in that. You can tell that they value that

so a couple of ways that they were able to achieve this right. they've positioned themselves as a Crm.
I used to think I thought that they were like a on our notion, and they are right. That's the market that they were in, but they're trying to. They realign themselves within the Crm segment. Not that that's a crowded, not a crowd of place, either, but that's intentional value positioning within a market segment, and they're going after it right? and if we can all agree that Cfos only by mission critical, software especially in a stress market.
you can tell that they put energy into positioning themselves as mission critical. They've done this by explain expanding their workflow management kind of offerings right? They're becoming more of an all in one tool, and they know that when Cfos look at that tool coverage, they're going to act everything that's not mixing critical, especially in a down market. So they're securing that they're securing that in a strategy here. in every segment they're smb mid market.
They're offering things like self surface templates and libraries without requiring heavy overhead on their Cs teams. In other words, they're not throwing bodies at the problem. They're looking at natural customer adoption. Right. That's something that they're there's feedback going on their Cs Teams were likely overloaded at 1 point, and they're feeding back
to product on. How do we give more self serve on the basic customer. Adoption issues. this allows their Cs team to then focus more on white glove service to their higher paying customers. That's how they're growing that right? They built out a strong integration with connected third party apps. They have a lot of third party plugins, because they know they want to be hooked into that stuff, and they know that people want to share data across all of this. They don't want to just kind of siloed into different areas.
I think that that's a valuable hook that they've created
couple of other things Here they promote and support tool consolidation. Right. See if those also like that. Right? this is a huge selling point for their sales team. When you get them on a call done a demo with them. They're talking about this on their call. It's in their playbook. and then they focus on superior user experience, right? They're trying to beat not only the Crm games of user experience, but also the the kind of project management tools out there.
and Ux is often underrated, you know. But really what I think that they're putting value on here
is what's worse than having a product that no one adopts because adoption equals data and data equals better decisions. When you get that feedback looping right, You've got really something that can drive towards revenue retention. So that's my kind of view on this. Anybody else. Ask some questions, I see.
maybe Vincent. how do you balance driving new Logos
without damaging net revenue retention?
Oh, I think that's a great question. the

you you don't have to do one and not the other. But I do think you have to put energy. I think Jacob mentioned that there's 2 objectives. I'm guessing the other one is growing net new business. and so so how do you do that? How are you splitting that? Be curious from Jacob. But I you know my my take on that is, you're splitting teams right? You're putting energy into both, and you need to have plans for both and then that feedback needs to go back all the way to product on how we're addressing both
Jacob, how do you got ideas? You you anything to share on that?
we're just doing exactly that. We kind of last middle of last year. We kind of split the team and created a specific customer success team that we we could just align goals with, you know, 2 separate groups and then have them focused on those those goals specifically so.
So. 1 one thing, and this is something we talked a lot about in session one and 2. One thing that gives me calls whenever you're splitting objectives. Anybody want to take a stab at one. The thing that I think would give me Paul's on that.
all right. It's managing expectations.
When you, when you have a split objective, I want to get strong, and I want to get fast
right. One of them is going to suffer for the other one.
So you got to put. If you're splitting your energy for 2 different goals.
then you're pulling away from one to support the other. That's always the case. It's just a fact of nature, right? So it's. Unless you split teams and you have 2 Jacobs. In this case, then you need to be. It's a good opportunity for you to set yourself up for success. And say, hey, guys.
we're splitting our teams. We're splitting our energies. That means we're going to get maybe half the results from either one of them
right? So we need to think about that unless we're doubling and creating 2 different kind of full on separately. Run initiatives here with the resources for both. But if we're splitting resources, we're going to get that kind of we're going to get what we put into it out of it right? So
I,
with with this kind of thing, I don't think monday.com has shut down their entire outbound new business kind of program. But I think that they have probably come to the conclusion that they prefer this net revenue. This, at this juncture over the other, and they're putting more resources towards it and expecting more from it than they are the other so just managing the expectations here is important.
You don't want to be caught with saying you could do both of them. You could get strong and fast, and then all of a sudden be saying. Oh, you know i'm slightly stronger. I'm slightly faster, but I miss both targets. That's a bad place to put yourself in
now. Cool, so
let's keep moving here. feedback lips

i'm i'm! I'm. My guess is I would like to talk with the folks over at money.com if any of you work there or have relationships here.
we're certainly. I think we're looking to do Some case. Studies over it. Scale to but the I'm. Curious what their feedback loop structure looks like in order to kind of achieve some of these results, right? They're crucial for change management and objective. you know, really achievement, right?
So I keep a running list of these questions. that I read that I encourage directors to kind of run routine audits on their sales or and I, we use these questions to do that right? So, including marketing and Cs leads in developing these questions, I think, is really key. You want to set up a Quarterly review or review, or audit structure. It doesn't have to be quarterly. It could be more often less often whatever is right for you. But that becomes a great way to get marketing.
Get Cs. Get sales
all in sync. What are the questions that we're asking in a sort of audit that we need to continually keep an eye on here y'all and so making sure you're all in alignment on that, getting their multiple viewpoints. And you're going to have a higher likelihood of noticing these marketing shifts market shifts earlier. Right? So here's a few of these common questions that I use what's changed for your customers? who in your customer segments, need help more than ever right now?
Who are the ones that are kind of trailing behind. how can we serve them a little bit better which segment, industry role? Right? Maybe roles are shifting. we want to ask that question.
marketing can help kind of reposition that for you sometimes Cs can help you pick it up.
Who do they help? who do they? Who needs help? Sorry, and what can they do without you now? Right
there's always something new coming in. We're not utilizing this part of your product anymore, because somebody else is doing it better. We want to notice that quickly. Right? that's gonna change our value, prop, and how? What we need to tell product. Maybe we need to ditch that feature and focus on something else.
how can you reinvent serving your customers and needs today, and moving forward. you want to. Maybe things shift right. This is a great question to ask. How can you make life easier for them now? Right
today, not yesterday, not a year from now, necessarily. What is what's their problem today that we could do? Can we do that with our solution? what's complicating their purchase? Renewal, right? Why, aren't they renewing? Why are they thinking about that? We want to talk about that later? I'm in with one of my clients. Now we're in talks with salesforce. They've been reaching out to us 6 months ago. I like that. It's annoying.
but I like it. But they started 6 months ago, because our renewal is up in January, and they started seating what's going on with, hey? I see that your this is your tech stack. We have some solutions for this. I see that you're utilizing this amount of analytics.

We have new things that you should be checking out. They're getting us, Demos. They're getting us information to inform. And now they're putting on the hard press on. Hey, look! Do you want to make this switch? We can consolidate for you. Here's how we can save you money
to bring that right back to us. so asking those questions earlier on what's different? What's changed in your in your cycle, and what do you need to address as a customer?
Again, where is the audience consuming information?
I I learned a lot of things off of Youtube. found, not not for necessarily business structure, but I like to pick up new new hobbies. I learned how to become an archery expert off a Youtube. I didn't couldn't have a teacher Local so where people consuming their information, or they come into pavilion. How has that shifted? How can you seed yourself into it? Right? what channels do we need to be adopting or testing right?
and then. I see that. Thank you. the Where's the audience? let's say, sorry. How can we pivot the product packages? Right? This is a feedback loop. So do we do Our audience want to see smaller service package?
do they want to see complementary services or add ons? What are they looking for? Here? added flexibility, tools, functions, added additional community sports or forums. You're going to get told to stay in your lane a little bit on this. If you don't have marketing and Cs behind you, and we're not rolling this up from a customer viewpoint.
I don't know if anybody's experiences. But trying to say, hey, I heard this customer, and they said they wanted this right.
What's the what's the answer for anybody you bring that to every product? How many people ask for that? What you know. How can you go back and gauge this? You need to consolidate those kind of feedback loops in order to get real change here. So you've got to start building that from the people that are talking to the customers, and that's your sales team.
Build this into your feedback loop.
As we look at feedback loops. I think it's important to keep this one in mind this is something I remind every single team, every single seller I work with
you know. Good times, bad times. This is a a manager said this to me earlier in my career. i'm pretty sure it's not his original. But i'm going to quote him on this. but it's a it's definitely something that to keep in mind. I'll love this quote
especially for you know, when, when, when reps, or if they lost a deal, that kind of thing or something's falling through.
Bring me the information. Let's bring this back and learn from it regardless. Right. Let's learn about that customer, and how not to go after them, or how to maybe not spend so much time with them Law and lost a now close lost analysis is a really good way to do this to look at. Why, we're losing deals. Not just why we're winning

alright, so driving change when we're looking to run, drive real change, you know. Most managers are focusing on focused on certain areas. Right? so we're looking at strategy. We're looking at structure. We're looking at culture. We're looking at systems. but there's one big piece missing here. Anyone want to call it out if we're looking at a change environment.
He seemed like, go to's, was the big big piece missing.
and I
people.
that's it. You in nail it now, Dave. Second place. yes, awesome. That's it. people right. people's behavior
prize. Yeah, we'll have to work it out. I think Kaylee is gonna work out a prize here high dollar, I know. So change is always gonna involve people, right? It's gonna always involve changing the behavior of people. That's the hardest thing to do. so you know, we don't have it easy here. Behavior changes happen in successful situations.
They most ha often happen by speaking to people's feelings. It's an emotional thing to change. W. Most of us are resistant to change right? and that's okay. If you would, I don't think we're going to change that, either. We're not here to do that in your workplace. but what we have to do is learn how to drive it.
and we have to do that by speaking to people's feelings. This is even true in organizations where there's a high level of focus on data analysis and quantitative results. Feelings Don't go away just because you got good data. So all that hard work you did to putting together your lagging and leading indicators. And you got it very working.
They're not. They're not really in vain here, but they simply aren't going to motivate somebody to drive changes because they're not what motivates. People
data alone won't change behavior right in order to have success really take hold. People need to find ways to help others see the problems and the solutions that influence emotions not just fault.
right? So that's the big kind of point here. and this goes for both teams and customers. Really. I don't know if you've checked out this book, the Heart of change. There's another book. I actually have it here a switch. Let's see. Can you get that? so I got my weird screen thing. But switch is another.
Another cool book that talks about this.
so the typical change kind of structure is analyze. Look at the data. Think about it, and then go to make the change right.
trying to fight inertia in your teams and indifference and speaking about getting people to actually use your playbooks and use this.
getting them to use playbooks. One thing getting them to change their entire behavior. It's a whole, another bug, right? So getting them to change with analytical art and arguments is kind of like throwing a fire extinguisher into someone who's drowning right? the solution just does not match the problem.

This approach works fine in a normal environment where you are working to achieve like standard improvements
we're looking to reduce duplicate costs by, you know, 10% where we're looking to shave off 10 days off the average sales cycle. Right? We can do those kinds of things with data and then thinking about it and then implementing a change.
But they're not going to work. Well, i'm sorry they do work well when parameters are known.
assumptions are minimal and contained, and the future is not crazy, Fuzzy right? But when the future is fuzzy
we need to observe what's going on. We need to evoke emotion and drive that feeling in our teams that peer to peer, sharing, getting people to use this stuff. and and you have to really get customers teams and customers
to do this right, to really feel this in order to change a buying behavior in order to change their behavior, and how they sell.
so you can learn more about this strategy. from the heart of change or switch is another one. Dan and Chip, he, I think are the authors on that? They have some really great stories about getting that kind of change organization in. We're not going too deep on this, but I wanted to call it out, because the the real method here is in seeing getting them to see where we could be.
What is the future? What is the goal? Right? Getting them to feel that they can accomplish it, feel that it's possible
Right? Feel that they can have the right strategy to go after that, and they can rally behind that, and then getting them to change right. That's how we implement that. We don't. Just say we're going to do this, and we're going to go after it. because the data set it, we're actually going to get them to feel something. Get them to actually interpret that and get emotionally behind it.
Right?
the of the day people buy from people. so people don't see the need to change. We talked about this right? so there's some. How do you do this right? How do you do it? In good times? Bad times down markets up markets right externally, internally. Let's talk about a couple of ways. So
we're building playbooks here, right? And we're with those playbooks. There's skills. There's content. There's processes. Those kinds of things.
There's
a different kind of equilibrium this happening when you're in a good market when things are going really well versus when things are to tested and trying right this a time for you to shift
on what you're coaching, and how you're coaching and what's gonna really take hold or not right. so times are good marketing and sales and activities. They tend to drift right? What's going on is they're like we got all these target markets, but we're just selling like hot cakes. Right? I'm not looking at my ideal customer profile as much, because

i'm closing deals right? So we kind of drift from that. That's okay. That's normal, right? We can use some time in that, Don't. Just buy into it's like, you know, riding the high or the low the feeling of closing those deals. That's great. You, as managers and directors need to be thinking about. hey! What skills should we be putting in now to really level up our teams so that this is strong because it's going to change. Things are going to come down from this high right so use this time to to look at. Oh, sorry uses time to to focus on multi-threading right? Multi-threading is a great activity. It strengthens your relationships with the buyers knowing out, and Don't just multi-thread
before the close multi-thread after the close get your Cs teams doing multi-threading have them checking in with stakeholders, making sure that it's working for everybody. Right? You want to build those strong relationships across buyer and influencer roles during the buying process, and after the buying processes.
your team. It's going to put your team in a stronger position, because when things go down their teams maybe get cut right. The person who is your buying championing may be out right. So how now? You're just like, you know all crap. What are we gonna do, you know? So, so if you build these relationships and you have them strong, now is a good time to do it when the getting is good.
use this as a time to build testimonials and case studies across your teams, so that you're not without those when times are bad. Right? it's a great way to build trust and relationships also
bring them to your quarterly business reviews. Invite a customer to your, you know annual summit and have them talk. Hold a customer summit. Those are great ways to bring people in. Get them to give you testimonials, build case studies. And now you just have more material to handy. Your teams more stories, and you can do story selling all that kind of good stuff
when the markets high. That's the right time to hit that right now
when times are low and this external shifts here. budgets are going to get reduced right? We know that revenue expectations are going to remain the same
if you can get your sales and marketing teams anchored back into your target market. Now we're bringing back in those personas who, reselling to again. Who's there? How do we talk to them? What matters most of them? Let's drive that marketing. We need your own board for this we're going to be prospecting into this. We're going to be selling and servicing what's easiest to go after and where we know our message really lands right. We're in a we're in a mode where things are contracting. find what's working now.
Right this is you know that that whole thing that you're looking for Russell and your and your day to day plan is what's working, and how do I clone it? How do I get everybody doing that more and faster, right? You want to definitely do that in a down market. We want to see what's actually sticking. So we're watching that Metric really close. and we're updating our playbook. Maybe that old play is not working. Get it out

of there, put in the new one. Just just you can sunset it and bring it back later. But we've got to change
Uses time to retrain on those target markets and personas. You can do it, Run a training on it. Get them back acclimated towards it. and then get your team focused on the strongest market opportunities. That's how you kind of dip into this right. Another good. No good thing here. So let's look at kind of a down market here. What happens? and with the internal shifts right? so how do we get our teams focused on? when
target segments and territories are contracting? i'm sorry they're getting more defined right? Is what I think I was gonna say here. So we we we're good times. We're able to say, okay, look, you know
versus just us. Now we're able to carve things up because we got so much business to go after in the northeast versus southeast versus mid, you know, mid Atlantic, etc. Let's go after it right. So things start to kind of separate territories. Kind of send a get smaller. this is a good time to build those good habits, encouraging them. Hey? I love the way that you're doing running this process, this discovery call. Let's get everybody really
dialing in those motions right? You can cultivate your team in this in this kind of higher environment, to get them towards that growth mindset. Get them all rally behind the the identity of this company. This is how we sell right. It's harder to do when things are tough, but you can get that behind them when things are good and you can get everybody doing that same buying motion because we're winning a lot right?
with the tough Times target segments and territory coverage.
They're going to actually get consolidated, right? So all know, we've got a same reps. Now. Got to take over the entire Eastern seaboard. Sorry you're going to be traveling a lot more right. Budgets are being restricted. Right? At this point. Give your teams. Remember, we talked about building in what your team needs. Now
give them the scripted on how the scripts now right they let them wing it in a good time, a little bit more test and learn. That's a good time for it. At this point we're dialing in. We're giving them the critical behaviors that they have to be able to execute on help them stay focused on that. that's going to allow them to spend less time trying to create new ways and give them more time selling and keep them focused.
Point to the clear destination. This is where we're trying to get to Guys. Our mission is focused here. We're giving them new, clear goals. We're reducing that. I want to remind you. Here's how we're going to get there.
Change is easier when you know where you're going, and why you're going there right. We've got to lower this market Here we have to get this revenue target. Here's how we're going to get there. Guys

and shrink. Those changes. Now make the larger change efforts smaller and focused, break down the elements of that change. So it doesn't get too big behind big for everybody to rally behind, especially in a down market.
you know, at this point, hey? Procurements are best shot here. We need to really focus on
getting those procurement sales to that. Getting it to procurement and getting it through procurement. Here's our play for that. Let's focus on this one thing, and we'll get more wins. What? Achieve our goal. Give them something to really sync their teeth into. This versus just saying, hey, we got to go so harder right? so this this is some kind of good good ways to think about how to coach your people through these kind of trying times. Right?
by our interest number One thing that's gonna change right? People are gonna have new objections new competitors are always going to be in the market so impeding, you know. Kind of and pending recession is going to increase the likelihood of those Keep your playbooks relevant
and usable, they'll become shelf where really quick in this scenario, if your value props Don't: resonate with your customers. Yeah, I tried that one. It's not working right
cool. What are we gonna put in there? We need to update that cost acceptance is a huge one. You might be, you know, have built up and got them using a whole bunch of different functions. But now you're top of the list for getting cut.
that sucks You don't want to be there, because in the the Cfos looking Are we really adopting this? Are we really using it? We need to make sure Utilization is key. We can grab this. We can have net revenue retention here, but if we don't build the cost and value together. We're going to lose that.
What other ways are they? Objective right? Is this no longer a priority for them? Do they no longer have the authority value? Prop didn't resonate right? Where are the places that we're getting objective? Has that shifted? Do we need to update our playbook on it. Keep an eye on this, especially when you're seeing a market market shift right
competitors.
Somebody needs to keep an eye on who's coming into the market. I've seen the cyber security market recently. Get flooded. Crm Market flooded you know. Productivity, tool market flooded right. Everything just gets flooded. There's always interest. There's coming in, and they're downplaying you. If your team is not staying in touch with your customers and prospects on a certain cadence, driving that trust and variability. Somebody else is right. Somebody is always going to be there.
So being able to effectively navigate these, you know, sales, dialogue logs to overcome objections is going to be a quintessential to closing your deals.
And these are great areas to always keep an eye on for updating your playbooks. I see these get stale really fast.

Any anything else to add in this, where you've seen playbooks get really stale for you when it comes to kind of addressing the buyer interest or intent.
Just curious. If there's other things here that you're seeing as a common kind of place or challenge
All right.
hopefully, it's good for all for everybody. So how do we coach through these right ongoing coaching needs to be a a constant for your org
if it's not yet. That's okay. It's all right. Look for the opportunities to coach your sales team more often right. the here's some skills that I like to coach towards Darren. really, during a downturn. But yeah, something to keep in mind here, and I'm: i'm hammering this in
for downturns versus kind of, you know, when things are getting better. but so in a downturn we want to look at resilience right?
The you you the conditions, no matter about how bad or good they're not going to last forever. You gotta teach them to learn to deal with rejections. It's part of the sales game. but they also have to learn to respect their customers priorities. So if your current pitches aren't working, or you're they're no longer making time for your reps. You know it's okay to to to empathize with your up and say this sucks, you know. But let's look at what needs to change in order to kind of bring that back. We need to bring some customers that are existing closest to us. understand? Look for those easy wins. Help Your teams fight through resilience. Right?
2 big ones here are empathy and persistence for me. this sometimes takes, you know, a understanding of really where your customer is now, and we have to ask those hard questions collaborative persistence means not giving up on the sales goals.
while also helping your customers reach their own objectives. This is always seems like a kind of competing force. How do I make my sales goals while achieving my customer objectives. They should be synonymous. We always looking for that. How do they come together?
so you know, prioritization on accounts. keeping your key account managers focused on sales, opportunities and projects that are critical to survive here. huge right? what's risk of churning right now? how do we know that their risk of turning what? Who's keeping an eye on that? You know new sales opportunities have a higher chance of closing and setting the right price becomes essential during these times. So other places to look at, you know, streamed streamline communications. it's gonna be key. Your teams are going to be asked to do more with less. How do we get to everything the removing bureaucracy? Right? self-sourcing pipeline
something I see all the time right. It's good times, hey? Cool. I don't have to make those cold calls like I did before, but now I've got to come back and revisit that skill. Oh, man, you know I need a training on this. I don't remember how to do it. I'm now gunshot on it right?
We can. We can overcome a lot of these right in an upmarket. The

the don't stop coaching. I see this happen all the time, so we're only coaching. Oh, we got to rally. And now help our teams
if you leave that when everything's good and you just, you know kind of celebrating nothing but wins Here, you're missing huge coping, coaching opportunities. One of my
favorite teams is clumsy football and and DAB a Sweeney i'll. I'll never forget I got to hang out on the sidelines with them during the game, and it was a Trevor Loris who's not doing so great in in the pros. But he he! He was a fantastic, you know, quarterback, young Guy, and he had just thrown a touchdown pass.
and they Everybody was excited. For a second he came back. Head coach was right there on him. They'd sit on the sidelines, and I noticed I was watching them, and I noticed what was happening was they weren't just celebrating the touchdown pass they were talking about how his footwork could have been better.
They're talking about how you know the way he was positioning and fell back on a foot, and they were like set there, and took a moment after this big score to talk about the footwork right, and I thought that was an incredible time. I know we just scored. Let's use it as a coaching moment, so use these high times as a coaching moment to good things to coach on doing this relationship building. Right? Let's keep our relationship strong. What can we send? What can we do for our customers that make them feel heard that make them feel, you know.
cherished in this. Let's deliver that to them solution, selling, really understanding their solutions, getting away from just feature selling. They may work in a in a in a good time, right? But they are not necessarily what's really going to drive when we need it most. And so let's make sure. We're aligning with solutions
multi-threading does everyone have this as part of their program. Right? we have to have multi-threading in this buying influencers change it's just there's more of them than ever now
do this before the close, and after the close
copywriting number one skill. I see that scale sales teams lack how to write good summary emails. You know how to write and think about personalization. there's a lot of training available on this now. And this is a good time to do. It is when.
when things are actually you know, in a ramp up. How do I just speak clear? How can I scale this up for myself? Always focused on discovery and qualification?
I think all of my decks here. If I look back on all in this course the number. One thing i'm doing is asking questions right and talking about all the questions I ask, I that's the same way I look at sales is, you know it's all about discovery. It's all about qualification and doing it Well is all about asking questions.
how do we do executive proposals and presentations? And then, of course, negotiations right. These are always things that you can teach when things are going well. and we can always improve on, and you can track it. See the metrics because deals are flowing. So just because you're in a ramp up.

Drop your coaching activities. Just look for new things to coach them, look for new things to tweak
I'll leave you kind of with this. This is a you know, Barry Hinds. But You know what are the ways that we can look to tweak our thinking and skills to create greatness. That should be always our mission. Right
good times, bad times, changing recessions, market shifts. How do we get our people really towards greatness. so there's always new things to coach
let's look at technology for a minute. Here. couple more things to go through the so there always be a an opportunity to coach right? this is a great. This is a great place to start right. You can see results by just getting utilization out of your tech stack.
Most tools can be rep replicated in some form of spreadsheet, right? So even salesforce ultimately can be done in a spreadsheet. But there's a reason why we use our tools right, and that's because they they do provide some level of of efficiency. if we use them well, they provide more efficiency. So we can always trains toward this. It's not necessarily going to move the revenue needle. So if you do get questions on. Why? Why are we spending time on training utilization of this? Because there is an roi in the activity, and that's getting your teams more efficient, more efficiency will lead to scaling opportunities. Right? So that that's that's more You don't have to go hire more people. You're actually getting more value out of them. It doesn't mean they have to work harder, saving them time to so look for opportunities to tell that, and remind them
not only up to the sales reps, but to you know anyone that's asking questions as to why we would spend time training towards this.
so leveraging it right?
It's it's kind of it's not that surprising, I guess, that that that tech stacks are under utilized, but it's pretty common right? the that you know a downturn will take a is a good time to take a a better look at this. How can we get more out of what we have? How can we leverage this better.
so using the right software tool doesn't mean increasing the number of Crm reports that you're kicking out or more work for your reps. Necessarily it means making the software intelligent and proactive. in many cases this may mean less. Crm: right? So let's look to equip our teams with the right tools.
so where some of the things that we like to look at here? you know. Where? How can we make them more successful? How can we use the teams better? By prioritizing and streamlining these workflows
we get rid of unnecessary bureaucracy, right? That's the real or a lot we get rid of all this back and forth, and communication breakdowns and time spent. so you can look at gaps in coverage. you know where deals getting bogged down. How can we reduce wait times for customers? These are great little improvements that we can make. How can we use these tools more efficiently, right more effectively. we're not using the call function. Well, why not? You know. we're not

tracking and listening to calls. Why not right? How can we benefit from that? Where is the time being spent? Right? you know. How can we improve that across our teams?
What new tech should we be considering. this is something where nobody really owns this. you know your tech teams. They're not assigned to go. Make you guys more efficient or find you new automations.
a great way that I like to get teams doing this. Create a little tiger team. You'll notice that reps sometimes are even buying tools
on their own. They're using their own pocket money because they didn't want to go to the bureaucracy to get it on themselves, but they wanted to try it out and see if they could be more efficient with it. I see that all the time some of them get their hands slap for it right. but what it's a great way to look at it. So if you create a tiger team
within your group and say, hey, you 3 guys or you guys are on this mission. I want you to keep an eye on what new automations we might want to incorporate. Can you all do that for us, you know.
Just bring suggestions. Hey? Here's some new ways that I think we could do this. Take a couple of demos right you guys are in charge of this, maybe give them a budget lunch budget, or something like that to get them in in engaged in this and get new tools constantly bringing into your your ecosystem. Right?
how do you make the the the existing tools kind of more efficient? this may be being dialing up or ramping back it doesn't matter. just just looking for better utilization. you know. Run a poll. How much you guys using this you can. You don't even need to run bowl most of the time. You can see how much data is actually getting in there, and you know you can't trust half of it. So you know. How do you drive towards this? I think that running a an audit on it and saying, guys, Are we not using this tool anymore? Why not? Let's get rid of it right as much as you want to bring in a new tool to help save stuff. Look to get rid of the stuff that's not being utilized.
so you know, redundancy is a big part of this. I think that. I I see a lot of tech stacks just get overloaded, Cfos. They're gonna get their eyes on. That first thing they want to do is cut anything that's not mission critical, you know.
Look at. Look for ways to kind of bring this back to your team as that audit. Look for ways to have the tiger teams actually running new scans on that and and make sure you're getting that pulse of what's being used. Don't let your tech stack get out of control to where you're having to. Just go cut stuff right.
You'll end up having to cut stuff you actually need. So
the
content overhauls right.
Our playbooks are filled now with content. They've got so much going on. I think. you know Russell had a great idea we talked about the peer-to-peer sharing right? Crowdsourcing is a great way to get your content. How do you create all this stuff? Are you writing all the emails. Are we writing all the templates?

It's a lot of work, right? So you know, how do we get this into practice? Make it a little bit easier on you and give you confidence in the content quality that the teams are using.
Well, Crowdsourcing is a great way to do it. Having the best rep, float up the best email the best caller float up the best call script the get subject matter. Experts look for the opportunities to have an outside consultant or somebody come in and speak with you. Maybe it's somebody just running. Maybe it's pavilion. That's a great, you know. Great courses get people to take courses on. You know how to do copywriting, how to write a business summary.
so that they can perfect these skills
and then collect those deal wins and customer stories and make sure we're delivering that back we can bring all of that in and as a crowdsource way, and we're not having to create it in house. So it's a great way to do that. recreating your content to serve right.
how do we make sure our content is all about our customers and not about us.
You know we talk about feature selling versus solution selling. That's one way. but look at. Look to make it more available to them. how do we put it on the website? Can we get this content out there? Can we get a calculator. on the website that shows
the roi and usage of our product. Can we share how our most adopted customers are using this so that we can feed that back and show it how we can serve our customers better. Right? Somebody that's on the fence about something. Those become great storytelling tools
find new ways to serve your content. I'm always looking for different ways to do this. I I get so annoyed. I just had a marketing call yesterday. where we're seeing a lot of traction from a new kind of
email format. It's a newsletter format that's coming out about Job. it's about hiring, and these kinds of things for creatives. But they're they're we're
that we're getting more traction because of it, simply because of the format of their newsletter. They they just went back to text. They went back to text, made it very personal, made it very much about. You know problems. They're going through challenges they're having versus, you know, just kind of block sponsored content. They're even taking the sponsorship content and rewriting it and making it feel like it's really from a singular voice of somebody's experience in the industry. That's a tiny tweak in a newsletter, and we're seeing more conversion
of it looking for ways to redistribute information.
So look for new ways to get that content out. Sorry I didn't mean to jump there.
Staying human, I think, is a huge thing here.
It's it's something it's probably the number. One thing we coached on at scale consulting this year is, how is you know personalization being used. it's pretty amazing, though.

Variety of what you see when we talk about personalization. knowing what school or I went to, or what I posted about my dog on Facebook is not really the kind of personalization that we're looking for in a buying such an area. and it does take research. It does take kind of in sincere engagement. you know I I get hit up every single day. I'm sure you all do to my sellers, and they're like, hey? I I I I think you'd be could use my
the lead Gen. System or my my crm, or whatever right I noticed that they've never once engaged with my content on Linkedin, and i'm pretty easy to find, and and and I find that this product just lazy at some point right. If you really want to sell to me, you you might be on the right track. But you're not engaging with me and trying to build any kind of relationship here.
and I don't know I don't need a lot. but but I I find it kind of like I've been sold consulting services many times like, and i'm like that's kind of what i'll do, you know. So, anyway, I find it pretty interesting. Personalization is a great way to kind of enhance your content. Teach your teams about it.
and then ensure relevance to current events. Right?
This is gonna change. I saw a lot of people miss the mark, and we're not empathetic with the whole Covid thing. and they just kind of went after it. They burned a lot of bridges in doing that by not being relevant to current events. Be sensitive to that. Be aware of it, especially in your market. Teach your teams to be aware of that. crystal. I don't know if you might use Crystal nose.com just as a tool there. But you can feature teams. Rss feeds. They can stay at the current events even outreach. I/O.
I think sales loss. They have ability to bring in Rss news fees, so you can customer. You can track your customers like if they're popping up in a press. Release that kind of stuff. It's a great way to do it to make sure you're not reaching out at the wrong time. but also being relevant around it.
Crystal nose is a little spooky but but a good one to check out, too, depending on what you're selling.
So before we wrap, I want to do one more walk through here. I got a few minutes. I told you I get you out early. i'm sorry. but we I i'm really enjoying this this part here and this.
I don't know how much this will apply to all of you. But I was on a call last night with the
It's an incubator group called get shit done. It's all about women. Entrepreneurs. it's really cool when it if if you're looking to build a business and looking for mentors. but it was a like speed dating, and I went through. I think it was 40 different founders, and we had 10 min together.
and a lot of them we're trying to talk about. Well, I want to sell to enterprise, but i'm selling the Smb. Now, or i'm selling the enterprise. I I I want to go down and try and capture Smb Market. Right? so that's for me. This is all about moving, you know, up market mean focus

mo moving the focus to larger enterprise Customers down market meeting focus to more Smb and mid-size opportunities.
I should have done a poll on this, maybe, but like anybody want to
chime in. Is anybody trying to make that shift right now of moving, hey? We're selling the smb or mid-size, and we want to sell more to enterprise. How do we do it, or vice versa?
Anybody that's a challenge for them now, or shift
Speak up. If you want, you'll have to.
Yeah, we're we're sort of doing that at our firm. I would say, we're moving from V. Smb. To
so going from customers with a annual revenue somewhere between one to 3 mill up to, you know. 8 to 15 to 20.
The challenge here for us, to put it succinctly, is saying no
to those smaller customers, and recognizing that saying no sucks from a new logo acquisition perspective, but saves a ton of time and helps keep us on the ball for process and product decisions that otherwise would be a lot fuzzier to make
if we were serving down market. Yeah, yeah, not it. It is a tough call, because you're there's a little fear there like, you know it's like, what do we? Do you know, if this doesn't work? And then we just shut down all those opportunities over, we lost those opportunities right?
and so yeah, that's so. That's a real challenge and and kind of conscious decision. I I hear you know you're not alone in that, and there's a lot of good material about how to make these kind of shifts. But let's walk through some kind of you know an example on that.
So how how does that strategic adjustment. I think you just kind of touched on it. will affect the the way your teams need to sell right. They need to talk a little differently if they were already selling to this Smb mid market. Now they need to talk a little differently when they go to Enterprise, and that conversation is going to feel different. We need to serve them in a different way. So what's going to need a change is one piece. What's going to need to change and get updated in our playbook is the other piece right? so whether you're expanding up or down, you're going to have to
support a wider range of acquisition strategies. Now, in an up market. We're moving to Enterprise right? It sounds like where you're headed. so they they don't purchase by punching a buy. Now, Button.
typically right. They they. They expected to be kind of wind and dine a little more. They at least need access to your sales team to help them navigate a more complex buying cycle on their end. and so how are you going to kind of keep some things moving there and and support your teams differently. Right? So, Some of this may be driving annual Multi year subscriptions right? You're going for longer Term deals enterprises.

They're not so interested in a monthly kind of thing all of a sudden. so maybe you're You need to align that better and talk about different things. You need. Look at how the renewals and update terms. You can bake these in a lot better with long, with larger clients, too. Right? So looking at how? Okay, cool? Yeah, we're going to do this one year, and it's going to auto renew, or you know, here's what the terms for renewal look like, and you're going to once you add users. This is going to look at, you know, like this right? So you can start to look at a lot more opt
and enterprise. If you're going to go through all of those hoops at the beginning, you might as well get those renewals bit baked in. I'll see a lot of that kind of missed it. Opportunity right?
adjusting the quoting process. you know, it's not just a number that you're throwing out on the monthly thing anymore. You might need to develop discounting approvals or guided selling. You know kind of mutual action plans at this point right? How? What? How are you going to hold those enterprise champions
towards getting you through the procurement stage? Right? How are we going to hold them to that. Let's let's hold them accountable a little bit. Let's teach our sales, reps how to use a mutual action. A plan? maybe there's some pricing rules. If you guys hit this threshold of usage, we need to explain this differently right so that we're not called with a bad deal. I I used to be at getty images. I was the the guy that had to go after at 1 point
all the bad deals in our in our portfolio, and I had to turn them into good deals. It was not a it was not an easy assignment, but I learned a lot through it, and you know there's a lot of bad deals just because they got close. Didn't mean they were going to renew for the course of business here, so we need to adjust that retooling processes for additional stakeholders. Right? Again, how do we navigate the procurement department
growing Cs teams and responsibilities? I think, is a huge one.
you know. How are we going to serve these larger customers once we do get them in and then increasing finance, flexibility, and controls. When you go up market enterprise, customers are going to have a more complicated subscription. That's pretty much a given which means their requirements are more complex. So if you give your finance team a little more flexibility and control, we can keep that those customers happy that needs to be a conversation between sales and finance at this point.
We need to have that to where they can have an out. Maybe they, those renewals are built built in those kinds of things, so that we know that we're justified and spending this extra time with them, not just in the upfront cost.
So these are ways that you can help them execute on the sales team by giving them more information, More training around this These become great playbook additions and coaching itineraries. as far as what we might want to include in a down market pivot.

so this is moving from enterprise. Now we want to go after some smaller customers. so some ways we can do this. We may need to develop self service offerings. Smb. Customers and consumers love that model because it puts them in control of the subscription. The price doesn't need to be as high. They can hit the buy now button right? but if it's too complex a confusing. They're going to bounce
Your goal is to make time to value as short as possible in this scenario. And so you know. Here's what to consider addressing operationally. Right. You may need to include easy access to devices. Right? How do I buy on a phone or wherever I am, how will my sellers speak to them and and talk about that as a value positioning this different electronic payment systems come into play. is your Cs team When people run some of that, do they?
We now need to become some of this navigating refunds, or you know, trial turnovers, or those kinds of things, or promote discounts, because people are self-serving, they need to be trained on that
These are all things to keep in mind when you make these shifts right?
your operations becomes a huge piece here, and so you need You're gonna work closely, ideally with your operational teams, but you're looking at automated tools, right? What new operational functions need to go and play to go after more volume, Lower Price Point customers. that's going to mean this kind of automation. This is going to mean kind of maximizing the scale of these operations.
You You can't just throw your sales people into that. And say, now, you need 100 new customers to hit target right versus 5. so this you you've got to think about that going down. Market means greater scale. You need to equip teams with automatic tools for building collections, renewals, payments.
Got to help them keep up.
so now, whether you go
up market or down market again last big piece here, and you want to take a guess on the huge item that's missing from this that are going to keep your teams actually motivated
if we're going to make a a shift to either one of these markets.
who called Dave or Vincent
the the the
the wagers on you guys.
so again, huge item that means be addressed Anytime you make a shift moving to enterprise for your teams to motivate them.
emotional things. Aha,
We got it. We got a winter. so
speak out there. Who is this?
I see a new comp plan. Who said this?
Oh, well speaking well, thank you. That's it. Nailed it.
sales incentives right? They got to change

anytime you're making these kinds of changes. It's the number. One thing I see people leave out right for either of these strategies. You have to think about incentives for their sales Plan right. If you're paying your team the same as an Smb scale when you're moving up market, it's not going to work. You're going to lose team members same way the other way. Throw in it. Now. I got to close 100 deals. Smb is not necessarily easier. right it just means like they have to get more of them. and you obviously don't want to be paying enterprise size and
is for quick and dirty consumer sales. Right. So reconsider what your fair comps look like. Make sure it's aligned that's going to motivate your sellers.
All right. I apologize for running this right up to to the time here. but really appreciate it.
great course. This is a rap. I really appreciate you all signing up and the feedback just really enjoyed this process. Kaylee Taliesin. Thank you all so much.
and one thing I do want to say, Gary, I don't know if he's on the call but he had asked for a play on how to get
help with if you're trying to build your playbook. You don't have the resources you don't have the time. we're going to send out a play. We'll put it into Shabbo. that actually shows
and gives you an actual play to run, get, buy in without making you look incompetent by asking for help or bringing in out of help to get help building your playbooks and doing that in in a cyclical fashion. So
we'll we'll have that we're getting it vetted by a couple of other eyes here, and some different consultants to make sure it's really solid for you. but we'll put that into shape when we have it.
Perfect. Thanks. Well, I just wanted to thank everyone for joining us today. we hope you enjoyed your time in creating and implementing a sales playbook that sticks.
As Taylor said, we would absolutely love to hear all of your feedback about this course, so we can continue to improve and provide some great offerings for you all. So there's actually going to be a survey like usual for just today's class. But then there's also going to be a final survey for the entire offering overall for all the classes. So 2 surveys technically are coming out today, and both of those are ready to go into Shaba right now.
and just a reminder about the final exam stuff. We will be sending out some more communication about that. but lastly, let's just have a huge round of applause for Taylor Davis. Thank you so much for sharing all of your insight and leadership with us. It's been a great course.
Oh, thank you. I I really enjoyed being with all of you, and I I I think my my biggest critique is. I talk too much in this course. I really wanted to hear from my Also you did great. I I hope to hear from all of you, and we stay in touch on the 1 billion channels, and
happy to hear. I would love to hear what works for you, and and you know, keep me abreast. maybe we can collaborate on things in the future.

Perfect? Well, thanks, Everyone have a lovely day.
Thank you. Bye, bye.