



GUIDE

# The Sales Playbook Blueprint:

5 Strategies for Success with  
a Playbook Planning Checklist



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# The importance of sales playbooks



A sales playbook is a must-have for modern sales teams. More than a simple collection of guidelines, processes, and best practices, a good playbook is a tool to ramp new hires quickly, get insight into successful strategies, and gain a deeper understanding of what it takes to win in sales.

Despite the benefits of sales playbooks, **42% of sales teams don't have one.**<sup>1</sup> While creating a playbook involves meticulous planning,

collaboration, and input, the time and effort you invest will pay off in the long run, improving sales performance and team cohesion.

A solid playbook can be an indispensable resource for your sales team, but knowing where to start can be challenging. In this guide, you'll find a blueprint for crafting your playbook, five strategies for success, and a checklist to ensure you consistently cover all the essentials.

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<sup>1</sup><https://www.aberdeen.com/cmo-essentials/sales-playbooks-taking-the-guesswork-out-of-sales-enablement/>

# How playbooks power business success

Imagine transforming your sales team into a powerhouse of productivity. A well-crafted sales playbook can do just that, boosting the confidence of new hires with a roadmap to close deals. Using a playbook effectively can benefit the business in a number of ways, including:

**Faster onboarding:** The average sales rep takes more than three months to fully ramp. A sales playbook puts firepower behind reps, with guidance that gets them to productivity faster.

**Higher retention:** A playbook offering resources to new reps helps create a nurturing work environment.

**Improved efficiency:** Ready-to-use messaging guides, scripts, and customizable collateral allow reps to shine as informed thought leaders.

**Deal acceleration:** Equipped with an arsenal of best practices and adaptable strategies, reps can easily overcome concerns, build trust, and lock in wins





# The blueprint for an effective sales playbook

While each organization's playbook should be tailored to its unique goals and needs, there are certain essential elements to include:



## Foundational information

Since your playbook will be a core resource for new hires, it should include essential background information to imbue a strong understanding of the following:

**Company mission, vision, and values:** Outline what drives the company and how reps are expected to behave during prospect interactions.

**Product suite, features, and pricing:** This might include collateral as well as video walk-throughs and demos from product and sales leaders.

**Competitive analysis:** This communicates your competitive differentiators to effectively position your products and/or services against others in the market.

# Sales methodology

Most sales teams have a specific methodology that reps follow, aligning with the company's values and market approach, such as Challenger Sale, SPIN Selling, SNAP Selling, or Solution Selling.

In your playbook, educate reps on the fundamentals of the methodology as well as how it should be applied, with details on sales stages and communication techniques.

# Sales processes

Following specific protocols is one of a rep's core responsibilities, and it helps ensure the team is operating in lockstep. Here are the ones to include in your playbook:

## Workflows

**Lead generation:** A description of how inbound and outbound prospecting is done, including channels, tools, and strategies to identify prospects.

**Qualification:** A set of criteria for assessing ideal customers, such as budget, needs, and decision-making authority.

**Discovery:** Scripts or questions to engage with qualified leads to uncover pain points, goals, and requirements.

**Coaching and training:** Training timelines as well as one-on-one coaching and reviews that will take place throughout the year.

**Compensation structure:** This might include base salary, commissions, and bonuses. While a sales playbook won't disclose an individual rep's salary, it will provide the compensation structure applied to the org as a whole.

**Software and tools:** It's critical to include an overview of the tech stack supporting your team, such as CRM platforms for tracking leads, prospecting tools for identifying potential customers, and communication apps for seamless collaboration.



## Sales enablement

Sales enablement materials allow sellers to confidently communicate the value of a product and demonstrate their industry expertise. Resources might include:

**Buyer personas:** Detailed representations of your ideal buyers, including pain points, goals, and buying behaviors.

**Brand messaging:** Top-level messaging, value props, and key features and benefits.

**Scripts and templates:** Email templates, call scripts, and sales collateral, such as decks and one-pagers.

**Case studies / customer testimonials:** Relevant customer proof points to support sales pitches.

**Brand guidelines:** Core values, tone of voice, and visual identity.





# **5 strategies to create a playbook that reps actually use**





## Build a playbook targeted to your team's goals

When creating your playbook, resist the urge to include every possible resource. Instead, focus on what your team really needs. For example, if they're having difficulty finding customers, prioritize education on sourcing strategies. On

the other hand, if your team is losing deals, provide proven objection-handling techniques. By carefully prioritizing the right materials, you can create a more actionable playbook tailored to your team's needs.



## Engage your audience with stories and visuals

Part of creating an effective playbook is making it engaging. People love narratives, so sharing customer success stories and sales wins will catch their attention and help them more easily absorb successful use cases and strategies. (Don't forget to throw in some examples of losses too!)

Also, consider the user experience of your playbook. Enlist the assistance of your design team to create captivating visuals that complement the content. Including graphics, images, or diagrams to illustrate key points or processes will break up the text.





## Designate a cross-functional playbook task force

By assigning a cross-departmental team, you can tap into unique perspectives that contribute to the playbook's effectiveness. For example, marketers might identify outdated messaging, while sales reps can share success stories. Not only does this result in a practical and actionable playbook with up-to-date resources, but it also fosters a sense of ownership and investment among team members.





## Measure success and iterate over time

Playbooks require regular updates to stay relevant. Establish basic metrics to monitor usage and designate a point person responsible for maintaining the content. Continuously gather

feedback from your sales team and make adjustments to both the structure and content, ensuring your playbook remains fresh and valuable over time.



## Keep content user-friendly and relevant with enablement technology

Enablement technology allows you to create and manage a single, comprehensive content library. By housing all your resources, including playbooks, training materials, and sales collateral, in a centralized

location, you make it simple for reps to find and access what they need. Enablement tools also offer workflows to revise and refresh content, ensuring the information is always relevant and up to date.



# A well-crafted playbook helps your team perform their best

A high-quality sales playbook has the potential to significantly reduce onboarding time and boost the effectiveness of your sales organization. To fully harness this power, it's essential to approach the creation and maintenance of your playbook thoughtfully and proactively, both during its initial development and throughout its lifecycle. As your company grows and adapts to new challenges, ensure that your sales playbook remains a living, breathing entity that reflects these changes. By taking this approach, you can ensure that it remains a valuable resource that contributes to the short- and long-term success of your sales organization.

To apply these practices to your organization, use our *Sales Playbook Planning Checklist* below.



## About Seismic

Seismic is the global leader in enablement, helping organizations engage customers, enable teams, and ignite revenue growth. The Seismic Enablement Cloud™ is the most powerful, unified enablement platform that equips customer-facing teams with the right skills, content, tools, and insights to grow and win. From the world's largest enterprises to startups and small businesses, more than 2,000 organizations around the globe trust Seismic for their enablement needs. Seismic is headquartered in San Diego with offices across North America, Europe, and Australia.

To learn more, visit [Seismic.com](https://Seismic.com) and follow us on [LinkedIn](#), [Twitter](#) and [Instagram](#).

Visit our Website →





# Sales Playbook Planning Checklist

Use this template to ensure your sales playbooks cover all the necessary components for success. Remember to designate ownership and due dates to keep your team accountable and on track.

## Purpose and objectives of the playbook

Owners: \_\_\_\_\_

## Company overview

Company mission and vision  
Company values  
Key products and services  
Competitor list

Notes on which documents to include

Owners: \_\_\_\_\_

Due Date: \_\_\_\_\_







## Sales process

Overview of sales stages  
Lead qualification criteria  
Prospect discovery protocols  
Coaching and training timelines  
Compensation structure

Notes on which documents to include

Owners: \_\_\_\_\_

Due Date: \_\_\_\_\_

## Sales techniques and strategies

Effective communication methods  
Objection handling  
Negotiation tactics

Notes on which documents to include

Owners: \_\_\_\_\_

Due Date: \_\_\_\_\_

## Software and tools

List of tools by function

Information on owners and how to get access

Notes on which documents to include

Owners: \_\_\_\_\_

Due Date: \_\_\_\_\_

## Sales enablement resources

Buyer personas

Brand messaging guide

Scripts and templates

Case studies/testimonials

Visual brand guidelines

Notes on which documents to include

Owners: \_\_\_\_\_

Due Date: \_\_\_\_\_



# Regular updates and reviews

Process for updating playbook content

Schedule for reviewing and refining playbook

Owners: \_\_\_\_\_

Due Date: \_\_\_\_\_

