Sales Playbook Template

[Insert Company Name]

Welcome!

This playbook is here to get you up to speed with working at the fast-paced, well-oiled sales machine that is [INSERT YOUR COMPANY].

We've covered all relevant topics from company to product to the actual sales and customer success processes, as well as your role and daily life in all of this.

This is not a set of rules, but rather a collection of tips, tricks, and lessons we've learned the hard way during our journey at the company. Take them with a grain of salt and make them your own—it's the end result that matters.

Mikko Honkanen
CEO, Co-founder

Table of contents

The company

The reason we’re all here

Company overview
Sales organization
Your role
Career path

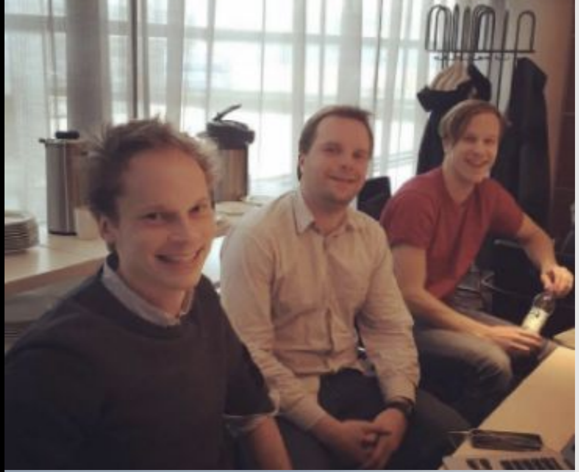
History

[Write your company's history. Take Vainu's own history as an example.]

Back in 2013, three childhood friends from Tuusula saw an opportunity in B2B sales.

What if there was a tool to help B2B salespeople use readily available data to have the right hunch (Vainu in Finnish) every time? What if they knew *who* to contact, *when* to reach out, and *what* to talk about?

Over time, this opportunity grew into a 120+ employee scaleup, with operations across 7 countries.



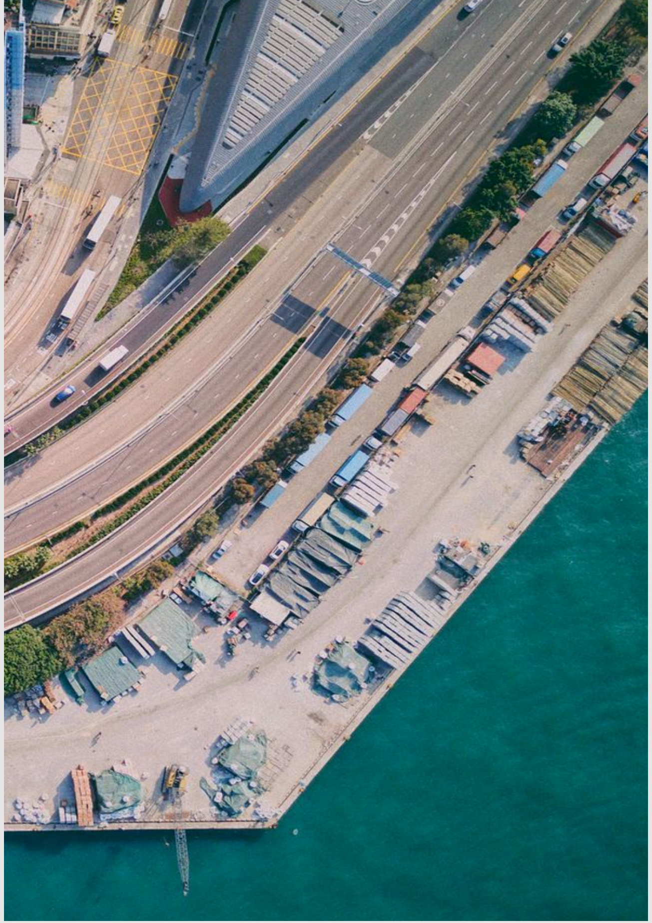
Mission

[A short statement that defines what your organization is, why it exists, and its reason for being.]

Vainu's mission:

We help companies personalize at scale.

Our ability to do so is a function of the data available, our ability to collect and transform it into useful facts, and to connect it to the business platforms our customers use.



Vision

[An inspiration statement that defines the overarching objective or goal of your company.]

We see a world where the gap between B2B sellers and buyers is closing in, through better use of available data. We're a part of this change, bringing this data to our customers—leading to measurable business results.

Our vision highlights this belief:

We'll create EUR 100M in cumulative revenue for our customers by 2023.

Values

[Write the common values that make your company thrive.]

We will achieve our goals by following our guiding values:

1. Focusing on our customers' successes over ours'
2. Being fearless in how we do things,
3. Taking extreme ownership of our objectives (or voicing our opinion if we don't agree), and
4. Showing respect and humility to those around us.

Our sales organization

[Insert organizational chart.]

New Business	Client Success	Client Development
Team members Role of the department	Team members Role of the department	Team members Role of the department

Marketing department

Your role

[Write the job description of a sales representative at your company. This will set clear responsibilities and goals. For example, the below describes the role of a Sales Manager at Vainu.]

- You'll sell to sales and marketing leadership in companies that belong to our ideal customer profile.
- You'll build your own pipeline, and have sole responsibility of your own sales targets.
- You will have at least 20 meetings with different companies in a month, with an average sales cycle of 30 days.

Career path

**[Career development is important for keeping the team motivated and retaining talent.
Write here a successful career path at your company.]**

Account Manager

Ideal for…
Required skills
Timeline:

Key Account Manager

Ideal for…
Required skills
Timeline:

Team Lead

Ideal for…
Required skills
Timeline:

Our offering

The solution we’re building

Product
Services
Pricing

Our offering

[Describe your offering, your product's features, and your unique selling points. Your sales reps must know your offering inside out.]

Vainu's ***real-time company data platform*** collects available information from open and public sources, transforms this raw data into meaningful company facts, and connects the data to our customers' business systems.

180M+	195	400K+	30
Companies in the database	Unique data points	Daily processed news articles	Days to refresh entire DB

Our services

[Describe additional services and up-sell opportunities.]

Onboarding

Implementation and training to ensure our customers get up and running with the platform as quickly and smoothly as possible.

Split into standard and premium onboarding depending on the complexity of the customer organization’s needs.

Professional services

Additional services for purchase throughout the contract period to get even more out of your product’s experience.

These include workshop facilitation, data or technical consultation, and sales training.

Pricing

[Include a breakdown of your pricing scheme.]

Our sales methodology

Real-time sales and marketing

- Sales methodology
- Ideal customer profile
- Buyer personas
- Trigger-based sales
- Key performance indicators
- Our tech stack

Real-time sales and marketing

[At Vainu, this is our methodology for sales. Explain here what makes your approach to sales unique.]

There's more data out there than ever before—according to Forbes, more than 90% was created in the last two years alone. Yet while some industries already use data to their advantage, not in B2B. Cold calling through random lists and spamming emails without targeting are still seen as viable tactics.

We believe there's a better way: One where you carry out personalized conversations at scale, using real-time company information in every customer interaction.

This is what we call ***real-time sales and marketing***.

Sales code of ethics

[A set of rules to guide us towards the things that matter on the long run.]

In addition to looking at the numbers, we also focus on ***doing what's right***. In B2B sales, we believe there's a right way (and a wrong way) of doing things, and so we wrote our own sales code to summarize how we believe things should be done.

Read it here **[Insert link]**.

"We aim to impress. We're deliberate in planning how we book a meeting, run a demo, send a proposal and interact with a customer, and it shows in our delivery."

Ideal customer profile (ICP)

[A description of a fictitious account. Your dream, perfect-fit customer.]

Over the years, we’ve noticed that our best customers, i.e. the ones who see the most benefit from our platform and stick with us, have a common trait. We’ve decided to only sell to those who fit that criterion.

Buyer personas

[A detailed analysis of the people who buy from you.]

Within our ICP, we've identified these ideal buyer personas: people whose needs our solutions best solve.

Buyer persona 1

Buyer persona 2

Buyer persona 3

Persona:

Sales Director,
VP of Sales

Persona:	SMB to Mid-market, reports to the CEO
Goals:	Increase sales, prevent churn, manage the sales team
Challenges:	Motivate the sales team, find leads, speed up the sales cycle

Persona: Marketing Lead

Chief Marketing Officer, CRO

Persona:	Mid-market to enterprise, Part of the executive team
Goals:	Deliver highly converting leads to the sales team
Challenges:	Sales and marketing alignment, data quality, lead conversions

Persona: Data Lead

Head of IT / Operations / CRM / Analytics

Persona: Enterprise
Approves data decisions

Goals: Improving processes, driving efficiency, security and compliance

Challenges: Data accuracy, data management, data flow

Key performance indicators (KPIs)

As in any sales role, the key metric is how much business you're bringing in. To be successful in the role, you should be bringing in a minimum of **[Insert target]** monthly in new business.

The easiest way to achieve this goal is by being active. The minimum standard of activity is **[Insert target]**—whether that's online or in person, discovery or demo, doesn't matter. But we expect you to hit it, every single week.

KPIs we track

These are supporting numbers we report in our weekly meetings:

Discovery meetings held

Demo meetings held

Upcoming meetings in the next 14 days

Sales forecast for the month

Pipeline for next month

Our tech stack

We use a modern stack of digital tools to make sure we're efficient throughout the process. Here are your daily workhorses:

VAINU

Our sales intelligence tool—how we know who to target and when.

HubSpot

Our marketing automation platform—where we attract and nurture inbound leads.

zoom

Our online meeting tool—how we present our offering remotely.

pipedrive

Our CRM—where we track our sales and store our data.

GetAccept

Our e-signature platform—where all the deals get signed.

slack

Our communications tool—where we interact with each other.

Our CRM

[Describe best practices and rules.]

Our CRM platform **[Insert CRM]** is the backbone of our sales process, and the data it contains, our most valuable asset.

We expect you to adhere to our rules and best practice to maintain healthy contact data.

CRM best practices

These rules helps us keep a tidy database:

Always add a contact person

Don’t forget to update pipeline stage

Use our standard nomenclature and vocabulary

Fill in all mandatory fields

Rely on the automations

A week at [company name]

[Creating routines allows your team members to maximize their opportunities for success. List all your daily or weekly routines here.]

Monday: Team meeting

Tuesday: Sales training workshop

Wednesday: Meeting booking power hour

Thursday: Team meeting

Friday: Weekly sales wrap up

Sales Process

How we acquire customers

Prospecting
Outreach
Discovery
Needs analysis
Demo
Proposal
Agreement

Process

[This is your routine to optimize sales efficiency. Summarize the steps of your sales process.]

In our sales approach, we follow a simple six-step process, systematically and diligently. Here are those steps: routine created to optimize sales efficiency

Prospecting

Identifying companies that fit our segment and ICP.

Outreach

Reaching out to prospects and reacting to inbound and outbound trigger events.

Discovery

Running first meetings to explain what Vainu does, qualify the prospect, and understand how we can help.

Demo

Running follow-up meetings to showcase the value of our solution for the customer in practice.

Proposal

Scoping out a solution with the customer and helping them through the decision process.

Offer

Documenting and signing a formal agreement.

Prospecting

Named accounts are your ideal prospects—the ones you've identified yourself as the the top 100 companies most likely to be interested in our offering in terms of company fit.

Unlike any other prospect, you should be especially active with your named accounts. Be sure to reach out every quarter to check in—after all, you do believe we'd be the perfect match.

Keep these named accounts under your name in the CRM platform, and add and remove companies as you see fit. But remember, only the 100 best accounts!

[How will you find potential customers?

Describe your strategy to find companies interested in the products and services you're offering.]

Outreach

Once we know who we want to sell to, it's time for outreach. To make sure we actually get a hold of the people we're targeting, we stick to a routine cadence when reaching out.

The cadence is a combination of different outreach tactics repeated for each prospect in a systematic way. This gives us the best chance to get our message in front of the buyers.

In this step of the process, gather in-depth information on your prospects in order to prepare your pitch and personalize your outreach.

[Describe your outreach strategy. When is a the right time to pick up the phone and call?

Include several examples of your sales pitch and collateral.]

Sales cadence

[Define the number of touches over a period of time to illustrate the typical sales cadence at your company.]

Day 1 — Email > Voicemail

Day 2 — Phone > Social

Day 3 — Phone > Voicemail

Day 4 — Email

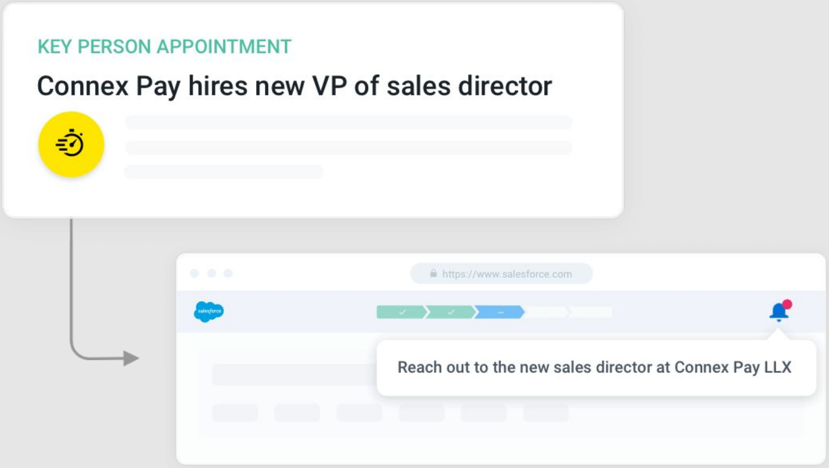
Day 5 — Email / Social

Trigger-based sales

Once you know your target market, knowing which accounts to prioritize comes next. In sales, ***timing is everything***.

We believe in acting based on triggers: moments in a company's lifecycle that suggest they are more interested in what we have to offer.

You'll be looking for sales trigger events within ICP accounts to help focus your sales efforts on the right ones.

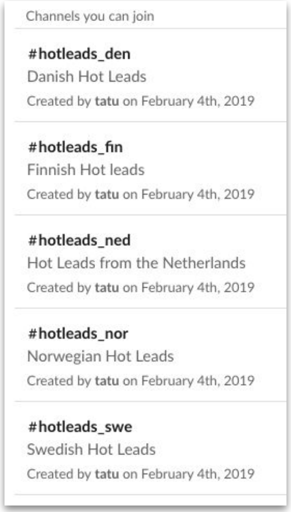


Inbound trigger events

Inbound trigger events come from someone interacting with our content on our website. These can be divided into demo requests (or SQLs), i.e. someone asking for a demo deliberately, or hot leads (MQLs), where they left their contact details and, based on our data, seem especially interested in our offering.

You'll get notified on inbounds via slack. And as they're reaching out to us, note that **speed is key**!

Once notified, view further details under **[your marketing platform],** and the **[your CRM's] marketing pipeline**.



Outbound trigger events

While inbound triggers focus on interactions with us, outbound trigger events look at changes happening on the company's end.

It's simple, really: certain changes make it more likely a company will have a need for sales tools like ours. And any time one of those changes happen within our ICP, we want to reach out as soon as possible.

Here are the four key changes we look to find and act upon:

1. **Changes in sales leadership**
2. **Hiring salespeople**
3. **Growth signals** (funding, expansion)
4. **New relevant technologies** (CRM, marketing automation)

Using content

Over the years, we've created a lot of content—hundreds of blog posts, dozens of downloadable templates—to share practical tips on using data in the sales process successfully.

In addition to tailoring your pitch, be sure to use incorporate these content pieces into your cadence to provide even more value to your prospects. Tailor the pieces you use depending on the prospect's situation at hand.

Not sure what to use? See our content mapping here **[Insert link]**.

Tailored pitching

For all the outreach you make, whether it's a named account or trigger-based, you'll automatically have a reason to be contacting them. Be sure to present that reason in your sales pitch—it'll make them take your meeting suggestion more seriously.

You should be doing this for every pitch you make!

"Hi Jim!

I'm calling because we here at Vainu have tailored a solution specifically for ***sales teams using HubSpot as their CRM***...

...I've been following your company for quite some time and noticed that ***you've recently expanded to Norway, congratulations!***...

...Would you be interested in a meeting to discuss how to use real-time company data successfully in your ***expansion***?...

Subject: “The first 100 days of a new Sales Director”

Congrats on the new role!

I’ve followed ***Company X*** for a while and noticed that you’ve recently started as the ***Sales/Marketing Director***. I tried calling you earlier to arrange a meeting, as we’ve made a service tailored for your situation.

We’ve met thousands of ***Sales/Marketing Directors*** during the past five years, and know the first 90 days in the role are critical in leaving a lasting impact. Here are a couple of resources we’ve created to help you get going:

The Sales Playbook - structure to build your own “way of working” for your sales team:
https://www.vainu.com/blog/sales-playbook/

Best Sales Tools in 2020 - list of different sales and marketing tools to help you to build your own toolbox:
https://www.vainu.com/resources/ebook/sales-tools/

I’d love to discuss your situation further and highlight how we could help you leave an impact through better use of data at ***Company X***. Are you available for a quick call tomorrow?

Discovery

[Your sales reps need to understand your prospects to be relevant. Explain here how they will develop an understanding of prospects' needs and pain points.]

In the first meeting, our purpose is for the customer to understand your company's offering on a high level, and determine on a practical level whether there is any value to them from our platform.

From a sales perspective, we aim to understand how the prospect does business, and link our offering to practical use cases they would see value in.

Meeting structure (45min)

Here's the structure to follow in these meetings:

Introductions (5min)

Sales deck (10min)

Needs analysis (15min)

Identifying use cases (10min)

Next steps (5min)

Sales deck

In the first meeting, after introductions, present your sales deck to the prospect. The key is to present ***why your company exists***, and ***what this could mean for your prospect***.

Be sure to learn how to present with the slides together with your team!

[Include here a link to to your sales deck]

Needs analysis

During and after your presentation, you should be engaging with your prospect to gain an understanding for how they run their business, and how we could help. At minimum, try to get an understanding for the topics listed here—through natural conversation, of course. No one likes being interrogated!

Business:	What does the prospect company do? What do their customers look like?
Challenges:	What are the business objectives? What challenges have they been facing? What strategic projects are going on?

Demo

[Explain here how you run product demos. Below is our approach to demos at Vainu and their objectives.]

In our follow-up meeting, the objective is for the customer to understand in practice what company data is relevant for their customer acquisition process, where and how it would best be consumed by the team in order to be as efficient as possible, and understand the tangible value of Vainu's platform in this.

From a sales perspective, we aim to understand what solution with our platform would be feasible, match the customers' needs, and provide the most value.

Meeting structure (1h30min)

Here's the structure to follow in these meetings:

[Write your standard meeting agenda]

Introductions (5min)

Recap from the previous session (10min)

Customer profiling workshop (20min)

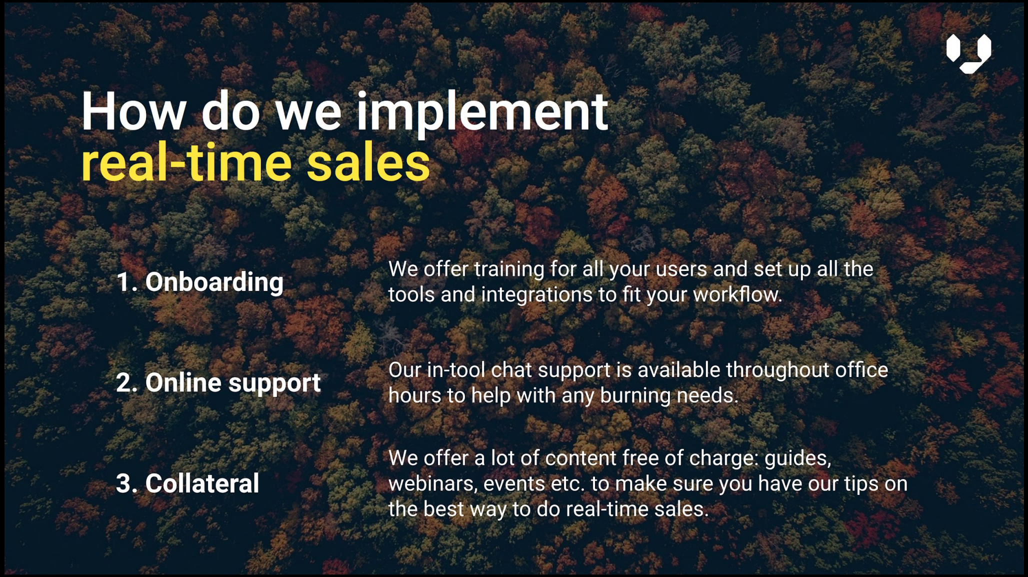
Trigger events workshop (20min)

Product demonstration (20min)

Proposal deck

You had the meetings, you demoed the product, and everything is all fine and well. They're interested. It's now time to talk business. The first step: a formal proposal.

You'll find our proposal template **[insert link here]**. Adapt it to the situation at hand—everything you discussed with the prospect should be covered. Customer challenges, product use cases, key data points, implementation, pricing, received value. The cleaner it is, the easier for the customer to say yes to it.



Agreement

They said yes! Time to turn our proposal into a formal agreement.

You'll find our contract templates here **[insert link]**—just fill in the details to the placeholders in yellow, and you're good to go.

If there are any exceptions required on the customer's end, be sure to check if its feasibility with Sales Operations before agreeing.

Once you've agreed to the terms, send the contract out for signature via [**insert your e-signature software]**. It's as easy as 1-2-3.

Signed and filed!

Congratulations! You'll get automatically notified on all closed deals through our dedicated slack channel. Share a brief summary on the case for others to learn from.

Once they've signed be sure to mark the deal as Won in **[Your CRM]**.

Finally, introduce the Customer Success rep to the decision-maker, and you're good to go!

Resources

Sales intelligence blog

Our collection of practical tips for using real-time company data to be more relevant in sales. Filter by topic to find what you're looking for.

https://www.vainu.com/blog

Resource center

Our collection of downloadable templates, ebooks, and webinars to help support your journey as a real-time sales specialist.

https://www.vainu.com/resources

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