



**HUNT & HAWK**  
SALES AND MARKETING

A GUIDE TO CREATING THE

# ULTIMATE SALES PLAYBOOK

WHAT YOUR SALES TEAM NEEDS TO WIN

A great coach does not  
say to his team,  
"We'll see if we win."

A great coach goes to his  
team and says,  
**"THIS IS HOW WE'LL WIN."**



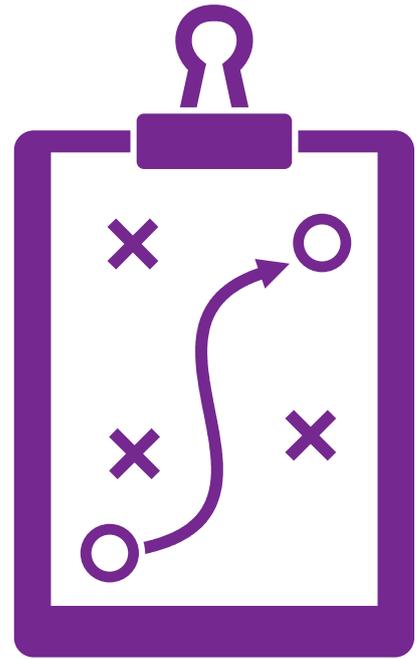
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# WHAT IS A SALES PLAYBOOK?

The company Sales Playbook is your bible. If you're a big sports fan, then you already know that this is a collection of plays that a team can call during a game. In business terms, the playbook houses all sales best practices, including your most updated learnings.

Use this when communicating with your sales teams to ensure that everyone is on the same page and, most importantly, playing for the same team. It's the manifesto of your business and the encyclopedia of all your customer engagement.



## But why do we need it if we're all trained and experienced?

Imagine welcoming a new team member onboard. They have sales experience and are able to jump into work right away. Cool. Along the way, they run into a dilemma and are now unsure about which person from your company to speak with— so, they get stuck. It eats up time, and potentially, could lead to losing a prospect.

You might think that this can never happen to you because you have a process in place. However, when you become too complacent in doing business-as-usual and putting aside the sales playbook that you're likely to end up wasting so much time and losing prospects when dilemmas or 'stucks' arise.

This eBook will show you how you can create the Ultimate Sales Playbook for your company, so that you'll have a play ready for every scenario. We'll break down each section that you need to include, who needs to be involved in the creation, and how a sales playbook can become your sales team's most valuable resource.

Of course, a sales playbook is not a substitute for comprehensive training. Rather, a supplementary material to it.

### HOT TIP

Make your sales playbook DIGITAL. This way, you can easily keep it up-to-date with new methods and changes within the organisation and circulate it to the rest of your sales team.



# THE ULTIMATE BENEFITS

With the help of this guide, you'll be able to create your Ultimate Company Sales Playbook that will give your business the ultimate sales benefits.

## 1 ● CONSISTENCY

The ultimate sales playbook is the company bible. It will contain everything from sales tools, processes, handover protocols, remuneration schemes, telephone scripts, CRM, and anything else that's relevant for your sales. So with everything in one place, you can increase efficiency and ensure cohesion, which can lower lead times.

## 2 ● BETTER POSITIONING

Consistency across the board of messaging, branding, and market positioning means everyone will be playing as a team. The outcome? A stronger brand, clearer message, greater understanding of the industry at large, and better market competitiveness.

## 3 ● BETTER PROSPECTS

Once on the field, the athletes will need to remember the different plays that will help them win. Having a point of reference makes this easier. The same goes with your sales team – with everything in one place, the objection handling, pain point identifying, and closing will be much smoother.

## 4 ● MORE SALES

When all of the above is combined to make the ultimate sales playbook, more sales will inevitably happen. As a result, the business will be better positioned in the market and you will be able to present your value clearly, without hesitations.

# GETTING STARTED

A successful sales playbook will give your business a strategic edge. So in order to ensure this, you will need the participation of key members of your company.

While this is a sales playbook, having leaders across different functions will prove to be important in making sure messaging, goals, and brand positioning are clearly defined and consistent.

## WHO SHOULD BE INVOLVED?

### SALES

VP, Directors, and some of your business' high-performing Sales Representatives.

Numbers may vary depending on the size of your business.

### MARKETING

CMO, Product Marketers, Market Researchers.

The goal is to be able to clearly define your buyer persona, brand messaging, and market positioning.

### EXTERNAL PARTNERS

Market Researchers, Industry Specialists, and even a team like Hunt & Hawk – marketing, sales, and professional services experts.

For a very invaluable outsider's perspective.

### PERSON IN-CHARGE

The person-in-charge will take the lead on the project, which is why this role is very important.

Ensuring communications, planning, and timelines are managed is crucial in a playbook's success.

The **#1** thing a sales playbook must include:

# CLEAR EXPECTATIONS

Remember: What will be written in the Sales Playbook is not set in stone.

It's a work in progress.

And with each new development or target achieved, you're likely to pick up a thing or two about other methods that work and processes that need to be updated.

You can also choose to either have uniform sales protocols in place or to have each sales representative use their discretion if this is something that works more effectively for your business. Overall, it depends entirely on you and your business.

That is why having clear expectations is important. When you are able to manage this, there will be alignment and understanding within your teams. Everyone will be playing as a team rather than running out on the field on their own not knowing where to go.



NOW, LET'S CREATE THE

# ULTIMATE SALES PLAYBOOK





# MISSION & BACKGROUND

To start creating your sales playbook, you must first go back to the very beginning – and by this, we mean that you must give your readers context as to why your business exists.

Understanding the history and the core of the company breeds more appreciation for the work it does and for the work that your team members are about to do.

Also, remember that the sales playbook will be read by both old and new team members. So the Mission and Vision statements and a brief company history are imperative as these are the foundations of everything else in the company like goals, objectives, and plans of action.

## HOT TIP

Do you have your brand story? The brand story will easily guide this section of the sales playbook. And if you don't have one yet, Hunt & Hawk can help you with that as we've done so for many of our clients.



# TEAMS & STRUCTURE

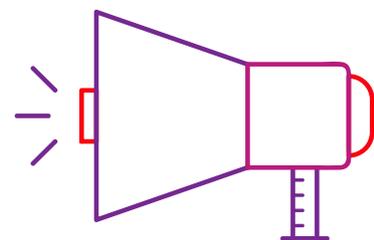
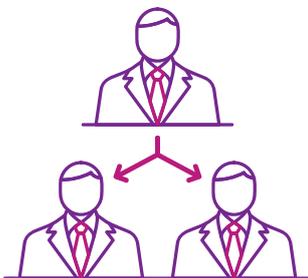
This section covers team structure and members. Having this readily available in your sales playbook will help avoid miscommunication, misdirection, and potentially, missed opportunities.

Additionally, include the subsections below to provide a more visual guide on structure and the different scopes of work.



## SALES LEADERS

Create a directory of the sales department heads and leaders. Include their titles, contact information, and even a photo for easy reference. This is optional, but including a brief professional bio may also be good to highlight their involvement with and contributions to the company.



## SALES TEAM STRUCTURE & ORGANISATIONAL CHART

List out the leaders of your sales department and map out the structure of the departments. This can be categorised by region, team, or hierarchy. This would also be a good place to include your organisational chart if you have one. *We suggest you create one if not.*

## NEW HIRES

Here you can discuss how you plan to grow your team. If there are any gaps in your current team structure, lay out the plans for it. Will the responsibilities of that role be divided amongst existing team members? Of course, include the plans for filling the position so that all your team members are aligned.



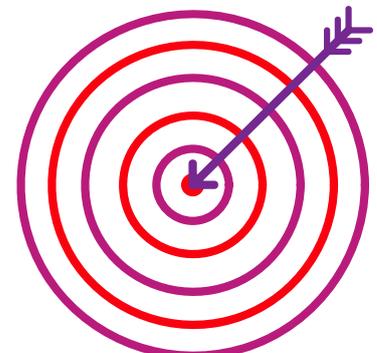
# TARGET MARKET

Who is the business talking to? Build out your ideal demographics by identifying their attributes, attributes, and other key components about their behaviours that may help your team better identify them in a sea of consumers.

## THIS SECTION MUST INCLUDE

### 1 ● TARGET LOCATION

We're talking about physical location. Depending on the reach of your business, you can indicate a different buyer persona and strategy for each location. If you are limited, it will be good to indicate why.



### 2 ● BUYER PERSONA

A buyer persona is a representation of your ideal customer, based on market research and real data about your existing customers. Think about their age, location, profession, educational attainment, living situation, and other attributes that affect their buying behavior or consumption of your product.



### 3 ● WHO ARE YOU NOT TALKING TO?

At this point, it is also helpful to inform your readers about who isn't your target as this takes out any of the guesswork when someone comes up and they turn out to be unqualified.

**“Everyone is not your customer.”**

— SETH GODIN

# TOOLS SOFTWARE & RESOURCES

As Ryan Devlin, the Director of Hunt & Hawk always says, "There has got to be a better way to do this." – and the answer is usually some form of tech.

Because where there is an opportunity to save time, there is an opportunity to reallocate that time to use for something that will gain you more revenue. So, if there is a tool, software, or resource that will create efficiency, then list them all down.

What tools and resources do you have within your company that teams can leverage on?

## OUR TOP RECOMMENDATIONS FOR SALES TEAMS

### CRM

HubSpot  
SalesForce  
Agile CRM  
Active Campaigns

### LEADS GENERATION

LinkedIn  
Automation Tools  
Mailchimp  
HubSpot  
LinkedIn Automation  
ClickFunnels

### COMMUNICATION & PROJECT MANAGEMENT

Slack  
Asana  
Monday  
GoogleDrive  
Zoom Bot

### PROPOSALS & PAYMENT

Proposify  
DocuSign  
Chargebee  
Stripe  
Chargify  
Practice Ignition



# MARKET POSITIONING & COMPETITOR ANALYSIS

Everything from your positioning, current market condition, value propositions, competitive advantages, and pricing strategy goes into this section. These are super valuable information for your Sales team to be able to build out their proposal best and confidently pitch to services to clients.

Also include a competitor analysis diagram to list out all of your competitors. What are their strengths, weaknesses, and counterpoints. Counterpoints are a guide for your sales reps to utilise during negotiations. If a company weakness is brought up, what counterpoint can they use to help make the sale?

**“ Even if your competitor is still small in size or weak, you should take him seriously and treat him as a giant. ”**

— JACK MA

# MARKETING STRATEGY

Now, you might be thinking— why are we including the marketing strategy in a SALES playbook? Well, we are firm believers that marketing and sales go hand-in-hand.

We talk about this in Hunt & Hawk a lot, and, is in fact something that sets our business apart from all other professional services agencies.

So, include a high-level summary of your marketing strategy in the sales playbook for the sales team to use as reference. For this, have a rundown of what sales should know about brand awareness and lead generation.

Depending on your strategies, the inclusions for this section may differ per company. However, for each marketing pillar or execution, include a point of contact.



## SOME MARKETING STRATEGIES INCLUDE

- EMAIL MARKETING
- BLOGGING & CONTENT MARKETING
- EVENT MARKETING
- SOCIAL MEDIA MARKETING

# PROSPECTING STRATEGY

As we progress further into the sales playbook, this next section will guide you and your team on the necessary steps to qualify leads and reach out to them.

While every sales person may have their own technique and style, clearly stating your prospecting strategy covers which prospects even fit the bill to begin with. When this is clearly laid out, then you can avoid wasting efforts and time on a lead who will never convert.

## THIS SECTION MUST INCLUDE

### 1 ● CRITERIA FOR OUTREACH

Set out the criteria on what would merit a sales outreach. List down essential attributes so that your sales team will only spend time on the prospects who qualify and leave out those who don't— or put them through a different sales sequence if they qualify for something else.

How is your company planning on connecting with prospects coming through inbound? Lay out the sequence for how the journey would look like for them. From following up on inbound emails, meetings at industry events, and social selling.

### 2 ● INBOUND PROSPECTING STRATEGY

If applicable, discuss tactics for conducting cold calls and emails.

### 3 ● OUTBOUND PROSPECTING STRATEGY

It would be best if you also have a guide for how these emails should actually look like. Your sales team can tweak this according to the prospect. But having a template like this in place can reduce the time spent crafting a short pitch from scratch.





## GOALS &

## PLAN OF ACTION

Of course, you're not going to go out on the field without any plans on how you'll win. The same goes for your sales team.

Prep them for the field by stating the goals and the plans of action that will support the achievement of these goals. Outline concrete actions that the team needs to take – i.e. How many calls should be made, how many locations must be visited, how many high-profile clients will be worked, etc.

### **ADDITIONALLY, INCLUDE THESE:**

- **REVENUE TARGETS**

What is your target revenue for the end of the period? Monthly, quarterly, annually?

- **DEAL TARGETS**

How many deals must be closed by the end of the period?

- **OTHER KEY METRICS**

Other metrics for your success. This can include units or services sold, customer retention, recurring revenue, etc.

# PAY SCALE

# COMMISSIONS &

# CAREER PROGRESSION

Just as well, include your commissions and pay scale schemes. Making this clear and transparent will manage expectations and create happier team members.

Are there certain commissions or rewards for targets hit? How does a pay progression for them look like? Any performance increase in place?

These are great information to include as it will drive your sales team to hit those goals. A motivated team is a productive team, after all.



It is also useful to discuss career progression in your sales playbook. As with everything you've included in your sales playbook, this has to be written out clearly as well.

- How are your sales people going to advance in your business?
- Do they hit certain milestones in their position after hitting certain years in the business?
- What targets do team members need to reach in order to be promoted?
- What is the process of promotion?

THE ULTIMATE SALES PLAYBOOK IS ONE THAT IS

CLEAR

CONCISE &

CRAFTED WITH CARE



## YOU'VE MADE IT THIS FAR!

The next step is to review your Sales Playbook  
and see how it stacks up.

[LET'S START](#)

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*For over 15 years, Hunt & Hawk has pioneered the new chemistry of Sales, Marketing, & Branding, helping many businesses achieve their targets and gain a strong momentum.*

