**Key Principles for Enabling**

**Sales Team Members**

The term "Sales Effectiveness" often serves as an umbrella term for the efforts aimed at improving the efficiency and success of your sellers. It encompasses the strategies, tools, and processes that help your sellers win more deals at a faster pace.

Under this umbrella are many things that you may already have. For non-sales executives it may feel a bit like word soup but sales effectiveness typically includes things like a **sales playbook,** which is a document or set of guidelines that provides salespeople with a framework for selling products and services. Or **sales operations** to manage the technology (i.e., CRM system) and processes such as territory design, lead scoring and analytics that enable salespeople to be efficient and effective. It also includes **sales enablement** activities, which ensure that sales teams have the necessary product or services knowledge, material, and skills to engage effectively with customers. Finally, it includes **lead management** such as prospecting, scheduling appointments and qualifying leads that marketing has generated.

Most B2B services organizations who are productizing already have many of these capabilities. The challenge is that they have been designed for selling services, rather than products. For example, CRM systems have to be modified to handle products and accurately forecasting sales for new products can be challenging due to a lack of historical data. Sales operations will need to develop new metrics and models to predict product sales performance. Sales enablement tools and platforms may need to be adapted or replaced to support product selling activities such as demo tools.

If your current sales channel is mostly doer-sellers, sales effectiveness capabilities tend to be very immature, in addition to being geared toward services selling. For example, doer-sellers typically do not need to bring in ‘sales engineers’ or a solutions specialist (or their equivalent) into the sales process if they are going to be delivering the work themselves. Organizations who sell primarily through doer-sellers typically do not have sales playbooks or have strong sales enablement capabilities. There may also be very little lead management support or guidance.

If you are building these capabilities from scratch, you may want to consider hiring a fractional revenue operations executive (or agency) to help structure your CRM, lead lists, and reporting dashboards. We suggest doing this before investing in a dedicated product sales team so that when you do start to hire new sellers they will be effective. It is harder to build sales effectiveness infrastructure after your team is in place, which is why we recommend starting to build it early, even if you are outsourcing it at first.

**Sales Playbook**

Once you have decided on your sales channel(s) strategy, you’ll need to validate and codify your new sales process that supports going-to-market as a more productized organization. Often this is done in a product sales playbook which includes a lot of the information we have already discussed in this book - your ICP(s), buyer personas, price points and packages - as well as the scripts and best process to use for discovery, qualification, objection handling, negotiation, etc. Think of it as an end-to-end guide that your sales organization will use to take products to market.

A sales playbook should also define the GTM operating rhythm of your sales (and ideally, customer success) organization. This means the daily, weekly, monthly, and quarterly rituals and structures that create a repeatable sales capability.

The process of creating the playbook and teaching the playbook can help you clearly define how your traditional method for selling services will be different from how you take your products and/or bundled solutions to market. For example, if you are selling products bundled with services, how will your sellers articulate the combined value of products and services or how will services sellers work with product sellers to determine the best product-service bundle for a customer’s needs?

The most practical advice we can give you is to start documenting your process and playbook from day one. It doesn’t need to be pretty or perfect, but instead a living record of what works and what doesn’t that’s updated constantly. If you’re just starting with a new productized offering and are playing the role of both product and sales, a playbook is critical for when you hire a dedicated sales resource for fast onboarding and a quick ramp. If you have a team of sellers, creating a playbook becomes a process of co-creation and finding the best practices that exist across the team. You can create an entire playbook in a 2-day offsite if you start with the right structure and tap into the wisdom of experience across the team.

There are resources available on how to create a sales playbook such as the book *Sales Enablement Playbook* by Cory Bray and Hilmon Sorey.

**Sales Methodology**

A sales methodology is a set of guiding principles and techniques that dictate how salespeople approach each step of the sales cycle, focusing on the "how" of selling, such as engaging prospects, overcoming objections, and closing deals.

There are many different types of methodologies for selling products or solutions such as MEDDICC, Challenger, or Value Selling. Choosing the right sales methodology for your team depends on your product, market, customer buying behavior, and the specific goals of your organization. For instance, Challenger might be effective in a complex, highly competitive market where redefining customer perceptions is crucial, while Value Selling could be ideal for markets where clear communication of return on investment is essential. We also suggest considering your existing team's skills and the type of training they will require.

**Sales Process**

A sales process is a more specific sequence of steps that a sales team follows to move a prospect from initial contact to a closed deal, essentially the "what" and "when" of the actions taken. While the methodology provides the strategic approach and tactical advice, the process outlines the operational steps necessary to execute those strategies efficiently.

You won’t create your first sales process until you have done at least 10 deals. The process for a new product where you are trying to determine product-market fit will be pretty truncated; do not make it overly detailed because it will evolve as you learn more.

After you have validated product-market fit is when you’ll want to create a more robust process, invest more in sales effectiveness capabilities, plus start to formalize your process in your CRM.

For example, this is a sample process for a mature product that we have adapted from Winning by Design. Red indicates prospecting activities, Blue represents sales steps and Green is customer success.



At this stage you may start to vary your process by the type of customer that you are selling to. For example, if you are using a product-led growth strategy like a free trial, the trial will take the place of the “prescribe, assist and recommend” phases. If you are not using a product-led growth strategy then you will likely use a product demo at the prescribe and assist phase. A complex bundled solution will have more meetings and maybe even a workshop in these phases.

Regardless of what you call your stages and how many you have, you’ll want to describe the goal of each stage, the sales actions your sellers should take, the tools they have available to help at each stage and the single outcome for each stage. You’ll also want to stipulate how long the different stages should last based on your average sales cycle.

For example, the goal of the diagnose stage could be to diagnose the customer problem and see if you can help them, the actions will include preparation and the discovery meeting, the tool may be a list of discovery questions, and the outcome could be a scheduled demo with decision makers. The goal of this level of description is to make it as repeatable as possible.

**Coordination with Services**

If you create a new product sales team (or other channels) managing the transition and coordination between the service professionals—who have historically owned client relationships—and new product sales teams is critical. You want clients to have an integrated experience, but you also want to make sure that your new products or bundled solutions are also given a chance to succeed. Your sales process should outline how you will do joint-selling or team-selling.

For example, creating clear guidelines on who is responsible for each part of the client engagement process helps prevent confusion and overlap. For instance, doer-sellers might continue to manage overall client relationships and strategic advisories, while product sellers handle specific product-related discussions and transactions.

We recommend encouraging joint meetings where both service sellers or doer-sellers and product sellers are present. This not only shows a united front to the client but also allows seamless information sharing and selling, where each party can contribute their expertise—service professionals with their deep client knowledge and trust, and product sellers with their product-specific knowledge.

**ICP, Qualification Criteria and Buying Signals**

A detailed description of your ICP(s) plus buyer personas and what makes a lead “qualified” will be an important part of your playbook. This should draw directly from the work you did in the first stage to define who you would sell to.

You’ll also want to define how buyer personas will be different from user personas and the personas for likely influencers on the purchase decision.

If you have an existing sales playbook for your services sellers, you may have different buyer personas for your more productized offerings. Understanding these new personas will help your sellers effectively tailor the qualification criteria that can accurately segment and target the right audiences.

For example, we were working with a consulting firm that traditionally offers risk management services to financial institutions but grew by partnering to develop and launch a compliance software tool. The traditional persona they engage with is the Chief Risk Officer, primarily interested in bespoke advisory services. With the new product, they also needed to target IT managers, who often begin the decision-making process for software purchases and influence the final decision.

You will get better at identifying the right buying signals as you close more deals. In our experience, identifying buying signals is trickiest when selling bundled solutions or when selling products alongside services. You’ll need to define qualification criteria that consider both the product and service aspects. This may require a more nuanced approach to lead scoring and qualification to ensure that the leads have a genuine interest or need for the combined offering.

For example, we worked with an engineering firm that has historically provided design and maintenance services but began selling a maintenance management software package alongside its services. Their Chief Operating Officer shared,

*“We had to add a whole new layer of qualification criteria that helped us look for signals like current dissatisfaction with existing systems, readiness to upgrade technology, and the scale of operations that would justify a bundled solution. Our new prospect scoring system assigns higher scores to prospects who we think have a need for both design services and an interest in leveraging technology to manage those designs.”*

Distinguishing between interest in products, services, or the bundled package can be difficult. Buying signals for products might be more straightforward (such as direct inquiries about features or pricing). In contrast, signals for services and bundled solutions might involve more complex indicators, like discussions around long-term strategic benefits or integrations with existing systems.

For example, if you are a consulting firm that also offers data analytics platforms, you may observe a prospect engaging heavily with content related to data-driven decision-making on your website. You could interpret this as an interest in the analytics platform. However, if during initial discussions, the prospect also expresses concerns about their team's ability to interpret analytical outputs this could be a buying signal for both the product and the consulting services, and a good opportunity to propose a bundled solution that not only provides the software but also includes training and ongoing consulting to help the client effectively utilize the tool.

Keep in mind that the sales playbook will continue to evolve as your product and go-to-market strategy evolves. We encourage you to create a feedback loop for your sellers to provide insights into what’s working and what’s not.

Also, please keep in mind that simply distributing the playbook is not enough. You’ll need thorough training sessions where sales teams can practice using the scripts and strategies in role-playing exercises to build confidence and fluency before engaging with clients.

**Lead Management**

In our experience, lead management is one of the most important sales effectiveness details that, unfortunately, often gets overlooked.

When we say ‘lead management’ we mean activities such as capturing lead information, assessing and prioritizing leads based on their likelihood to buy, reaching out, nurturing them with targeted communications, and scheduling with leads. In many organizations, inbound lead generation and initial qualification will sit with marketing but there also needs to be a sales function that is helping sellers talk to the right leads at the right time. Even if you are selling to existing customers, you’ll be much more successful if you carefully choose WHO you are going to sell to rather than just “shaking the opportunity tree and seeing what falls out.”

You’ll want to be very deliberate about your target list of early customers so that you can get the most amount of success for the least amount of effort. For example, targeting the customers who were part of your initial market research, or who are newer to their role and perhaps more innovative in their thinking or open to experimentation. They could also just be the prospects that are in the territories of your strongest sellers who are most excited about productization.  The success of the early sales efforts will generate more enthusiasm for the productization strategy and provide seller and client case studies to help persuade others of the benefit.

**Sales Enablement**

At its essence, sales enablement is about making sure your sellers know what they are selling and why it is valuable to customers. Every seller should know what customer problems your productized offerings solve and for which customer segments. This sounds ridiculously obvious, but when a product is developed and launched quickly, it’s easy to forget the importance of taking the time to explain the ‘why’ behind the new offering. Introducing the sales team to the new product and any changes to your sales process is critical to building trust among the sales team and for giving them the knowledge needed to effectively sell it.

Next, build a selling toolbox that maps to the stages in your sales process. This includes good collateral such as a pitch deck and a one-pager. When developing marketing collateral, it’s common to think about the client and forget that marketing collateral also gives the sales team the confidence that investing in all levels of the product launch brings.

In addition to the marketing collateral, give your salespeople an arsenal of tools to make their job easy. This includes things like a thirty-second elevator pitch script, an FAQ document, a product demo (video or live with a script), objection handling talking points, an overview of how the product is different from what competitors offer, and anything else that someone learning about the new product needs to know, or that you want them to know.

This should not be built all at once. Early in the product’s maturity, if you are working with a pilot team of sellers, sales enablement will start with a pitch deck, a one-pager and a demo, if appropriate. Later you’ll add a FAQ and competitive positioning.

As you mature, if you are selling bundled solutions you’ll also want to invest in cross-training where service professionals learn about product features and benefits, and product sellers are briefed on the nuances of existing service contracts and client preferences.

With products, it's also important to make sure that your sellers have a working understanding of the product's ‘recipe.’ This includes the technical aspects of the product, including, if appropriate, how it integrates with other systems or platforms. The recipe also includes use cases, the product ecosystem, including compatible products or services, and the product’s development roadmap, including upcoming features and enhancements. Finally, it should include what can be customized by the seller before needing approval.

**Sharing Product Roadmaps**

When sharing the product development roadmap with your sellers, remind them that product development is iterative, as we discussed in our book *Productize*. The first version is not the final version and the product will evolve as market feedback is received. Explain to your sellers why you structured the roadmap the way you did, so the sales team knows the customer problem the product solves in its current version, as well as the customer problems to be solved with future versions.

For sales or other external-facing purposes, we recommend keeping the roadmap high-level, such as using Now, Next, Later as your time horizons, because you don’t want to incorrectly set customer expectations about the timing of new features. For example, one product leader shared how he learned the hard way not to put specific dates on a product roadmap for sales, “*I made the mistake of sharing a time-based roadmap with sales, and they kept trying to sell future features to customers, which only delayed deals getting closed and highlighted what we didn't have yet.”*

We recommend holding regular product update meetings with sellers both to update them on changes to the roadmap and also to collect market feedback. Good product managers will build relationships with sellers so they are also getting informal feedback and running product enhancement ideas by sellers. As you mature, we also recommend conducting regular (once or twice a year) product feedback surveys with your sellers on the strength of your products’ value propositions and competitiveness.

**Demos**

Demos will likely be a part of your sales process, especially if you are selling more traditional products like software or a data as a service product. In services, the expertise of the professionals who will be delivering the services demonstrates credibility, but in a more productized offering a product demo serves this role. By showing how the product works in real-time, demos help potential customers visualize its benefits and see how it can integrate into their existing processes. This not only helps in building trust but also engages customers more effectively than traditional presentations, allowing for a dynamic interaction where queries can be addressed immediately, clarifying concerns and illustrating the product's direct impact on business outcomes.

As part of your sales playbook, you’ll want to articulate who is doing demos and when in the sales process you should do a demo (HINT: only do a demo after the prospect is qualified). Even if you have invested in a sales engineer or will have a product representative doing most demos, we recommend training all sellers on how to do the demos.

To conduct an effective demo, it’s essential to not just show how the product works but to explain how the product's features translate into tangible benefits, such as increased efficiency or cost savings, rather than merely listing capabilities. Keep the demo concise, prioritizing clarity and relevance to maintain the prospect's interest. Using real or relevant data can also make the demo more engaging and relatable, strengthening the case for how the product resolves specific issues.

Preparation is key to a successful demo. This is because good demos are not rock solid, set-in-stone plans; rather, a good demo acts as a playbook that you tailor based on who you are talking to and what their problems/needs are. As Robert Falcone, author and head of Sales Engineering at Guru puts it, *“You want to know all the plays but only run the ones you need at the moment.”* Anticipate potential questions and objections, and train your team not just on the product's technical details but also on their ability to present and interact with potential customers effectively.

Over time, your product team can create different demos based on different personas. As you enter new market segments, you’ll want to create demo ‘versions’ for those market segments.

As it relates to product design decisions, keep in mind that the easier a product is to use and the more self-explanatory it is, the easier it will be for sellers to demo without additional support.

**Sales Operations**

Sales operations includes the technology (e.g., prospecting tools, CRM system) and processes such as territory design, lead scoring and analytics that enable salespeople to be efficient and effective.

If you already have sales operations, one of the key adjustments you’ll need to make as you productize is in the assumptions you use to forecast sales. That is because the key assumptions such as conversion rate and time-to-close are likely to be different with products or with bundled solutions than they are with custom services.

You may also find that, as products mature, that you may need more investment in your sales technology, especially if you have primarily been selling through doer-sellers.