Sales Playbook Best Practices

Checklist

- **Before the Call**
  - Do research on your customer
  - Include an Agenda
  - Have a max. of 1 slide every 2 min. (if slides are necessary)
  - Contain a font bigger than 30 pt.
  - Keep text and design to a minimum
  - Include websites, apps, or other interactive aspects to engage
  - Highlight their main pain point
  - Define how feature or value focused you will be based on the stage of the sales cycle.
  - Tailor the call to the main value the prospect would get with your solution
  - Prepare for potential questions/objections
  - Use speaker not to obtain important info about the customer
  - Make it easy to customize or shift focus during the call

During the Call

- Establish a relationship using prospect research
- Use storytelling to draw a vision
- Use easy language
- Engage the customer in the meeting
- Summarize their core pain points/goals
- Own the agenda and finish on time
- Mind your monologues
- Don’t focus on the slides – focus on the conversation
- Don’t save questions for the end of the call, they should be peppered throughout
- Agree on common goals
- Don’t be afraid to ask for next steps, ask what needs to be discussed so you can move forward
- Commit them to action (get buy-in)

Presentation Timeline