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Sales play template

You've identified an opportunity to improve the development and management of your enablement programs. As you look to build a business case to get the budget required, you'll need to consider a series of your own discovery questions to choose the tool. From initial evaluation and implementation to managing the tool over time, these questions are designed to help prompt some of the questions you might need to ask internally or externally to make sure you get the ROI you need.

Target customer profile

This section should include context on which types of contacts and accounts they should be prospecting into or qualifying.

Example:

- Persona: Chief Marketing Officers (CMOs)
- Segment: Enterprise
- Verticals: Retail
- Geographies: North America, Europe

Target account list for outbound, with contacts by persona on the account

This section will include a list of contacts to prospect into for an outbound play. It will likely link to a list in your organization's Customer Relationship Management (or CRM) tool.

Example:

- List of accounts to expand in
- List of accounts to upsell into

Role-specific guidance and rules of engagement

This section will include guidance for revenue organization members. It will include context on which revenue organization roles should be engaging, what steps they should be taking at what cadence, how they hand off to each other, and so on.

Example:

- *Outbound Sales Development Reps (SDRs) need to identify the top 10 accounts they are going to prospect into based on the target customer profile and provided lists. The SDR needs to reach out to the identified contacts within one day of the play launching using the provided marketing materials.*
- *Inbound Sales Development Reps will follow-up with all inbound leads generated by the marketing within a two hour SLA agreement—with the provided marketing materials. They will qualify the lead using the MEDPICC framework. If the lead is qualified, they will change opportunity status to "Sales Qualified Lead" in the CRM.*
- *Once an SDR has reached out to the contact and gotten a response to meet, they will set up two meetings.*
    - *One meeting is with the Sales Engineer and Account Executive on the account and themselves. If the contact is from an existing account, they should also pull in the Account Manager and Customer Success Manager. In this meeting, the account team fills out the deal template.*
    - *The other meeting will be between the contact, Sales Engineer and Account Executive.*
- *During the meeting, the Sales Engineer will demo the solution.*
- *Etc.....*

Materials for reps to converse with the buyer

This section will include play specific external talking points, discovery questions, objection handling, and email sequences to be used by the account team.

Example:

- *Talking points*
  - *Did you know that 65% of enterprise retail marketing organizations do not have a holistic view of how their marketing funnel converts to sales pipeline? Yet organizations with visibility into the full prospect and customer lifecycle report 15% higher revenue performance.*
  - *Our company, Optomyze, provides the most comprehensive view of the marketing funnel. We move data from disparate systems into one business intelligence platform. We integrate with over 100+ marketing and sales tools, while providing APIs so you can connect to any system you use.*
- *Discovery questions*
  - *What data silos exist within marketing?*
  - *How is that impacting your ability to drive marketing performance?*
  - *What would it mean if you could solve this today?*
  - *What systems are you using?*
- *Objection handling*
  - *Objection: "Your solution requires APIs to get set up and I don't have developer resources."*
    - *Response: "For a small added fee, our professional services team can set those up for you. Once they are set up—they are good for your lifetime as a customer."*

    - *Objection: "You're almost 2x more expensive than the competition."*
        - *Response: "Most BI tools don't offer the level of personalization we can with our AutoFix feature. Also, our speed of real time reporting is unmatched."*
- *Email sequences*
    - *Link to list*

Supporting internal assets

This section should include links to any assets that the revenue organization may need to reference to make the most of this play, like battlecards, personas, FAQs, and so on.

Supporting external assets

This section should include links to any prospect and customer facing assets that the revenue organization may need to send externally like white papers, product one sheets, case studies, and so on.

Related marketing activities

This section should include context on any marketing activities related to the play, like campaigns, marketing content, events, and more.

Example:

- *Marketing is currently running a campaign promoting a new whitepaper on [xyz] topic. Key points from the whitepaper include:*
    - *Data point 1*

- *Data point 2*
- *Data point 3*

- *Within this campaign, marketing will also offer a webinar with [x] customer. Any registrants/prospects who express interest in getting a demo from that webinar will automatically be routed to SDRs as a Marketing Qualified Lead.*
- *Marketing will host an event designed to help deals close on [x] date in [place]. Account teams should identify 1 key contact from each account to invite. Reach out to your Field Marketer to learn more.*

Sales incentives

This section should include any context on incentives for sales reps to engage with the play, like sales SPIFs (sales performance incentive funds—which could be monetary, prizes, recognition, etc.).

Example:

- *SDRs who create 10+ opportunities in [x time frame] will get a one time $500 bonus, paid out at the end of the quarter.*
- *AEs who close a deal within the quarter using this play will receive a one time $1,000 bonus, paid out at the end of the quarter.*

Promotional offers

This section should include information on any prospect or customer facing promotional offers, like time-based discounts or buy one get some offers.

Example:

- *Existing customers are eligible for a 50% discount to list price for our API add-on SKU if they purchase by the end of the quarter.*