



Improving Sales Performance with Solution Playbooks

A PRACTICAL GUIDE FOR SOLUTION PROVIDERS



Introduction

Marketing has presented a challenge for solution providers since the first engineer had the idea of charging users for technical advice. Most solution providers build their success and customer base first around deep expertise in a technology or application and expand based on references and word of mouth. But there comes a time in the growth of every business where executives look beyond technical expertise and seek to expand by leveraging highly skilled sales teams supported by pre-sales technical support and marketing efforts.

Historically, marketing for solution providers has been funded, and therefore guided by, the support and programs offered by key vendor partners. Typical strategies have included using co-op or MDF dollars to hold seminars that feature vendor technology and offering spiffs to the sales teams who drive the most product in a given year. While effective, these marketing efforts were siloed by vendor and often drove solution providers to make structural and organizational decisions that aligned all sales and marketing efforts by products.

Eventually, partners who excelled grew beyond this model. They differentiated themselves by going to market with multi-vendor solutions and made direct investments in marketing and sales training above and beyond the support and direction provided by their vendor partners. Those selling complex solutions leveraged tools such as sales playbooks to arm their sales teams to understand, position, and sell complete solutions.

Solution provider executives make the decision to create playbooks for a variety of reasons, but some of the key goals are generally the same:

- Higher profit through repeatable solutions
- Higher win percentage through consistency in sales approach and training
- Higher revenue by bundling total solutions
- Higher sales productivity
- Higher margins from services revenue

Creating a sales solution playbook may be a critical common denominator differentiating solution providers and unlocking higher profits, repeatable solutions, and sustained competitive advantage. The sales solution playbook also delivers independence for the solution provider from reliance on the funding and direction of vendor channel marketing programs.

What is a Playbook?

A playbook is a sales and marketing tool that focuses sales efforts and provides a tangible deliverable aligned to company marketing strategy. Broken down to basic elements, we offer the following definition of a playbook.

A playbook is a document or a set of documents where an organization records all of the key information needed to help sales and technical teams:

- Understand the business and technology trends impacting their customers.
- Ask the right questions to qualify, scope, and propose the right solutions
- Improve competitiveness and raise the probability of closing sales
- Ensure sales teams sell repeatable solutions consistently across customers thus improving profit and reducing delivery risk

While formats vary, playbook content can be in a single document, a set of documents, or may even exist as an online folder or area of a website. Simple playbooks can exist as a multipage guide supplemented with Powerpoint presentations, solution architectures, data sheets, or service methodologies that help sales teams understand how to approach a sale.

Determining the Plays

In determining the plays, there are several key questions to consider:

1. What major technology challenges are my customers facing?
2. What are the major technology trends that map to those challenges?
3. Can I build a solution based on current and potential partnerships and combine those with professional services?
4. Is the play highly repeatable and profitable?
5. How can I differentiate my approach to delivering this solution play?

For many solution providers the answers to these questions will be obvious. There is a great deal of research and press covering both customer challenges and trends. Where the real unique opportunities lie are in the not-so-obvious or in the solutions that are unique to a given solution provider. Differentiation is key. The best plays highlight or provide unique competitive advantage for the solution provider. For example, if you have a deep bench of talent in security, find something that your team knows that others may not – particular knowledge of a vertical industry or a government regulation that dictates certain security requirements, for instance.

In addition, a great play should not necessarily be an end in itself. While you can declare success by running a play and winning the deal, setting up ongoing business is the ultimate goal. Consider plays in the context of what you want your customer to do next. If it's a new solution, then have you planted the seed for a managed service to monitor that solution? If it's an assessment of an existing technology process, have you developed a play for selling the remediation services? From a financial standpoint, the play must deliver a solution that is predictable, repeatable, and profitable. For your sales efforts to truly scale, you'll want the entire sales team selling the play and the technical team delivering the play over and over.

Checklist for a great play

1. Includes unique services that only you deliver
2. Maps to a multi-phased solution approach ensuring follow up business
3. Maps to strong in-house technical skills for pre-sales
4. Packageable and repeatable, mapping to in-house delivery skills
5. Known and predictable profit-profile for the play
6. Aligns to a meaningful and urgent customer challenge

Creating the Playbook

The process of developing a playbook may be one of the most valuable things your organization does to get everyone on the same page and drive corporate strategy. The natural owner of the playbook in most organizations is marketing. Marketing is often in the best position to see across corporate groups and is normally tasked with the creation of tools to accelerate sales. Since many solution providers do not have formal marketing organizations, creation of the playbook can be quarterbacked from a number of areas. Business Development, Practice Management, or Vendor Management are all logical owners of playbook creation. Most firms have senior resources aligned by vendor or solution area tasked with driving sales. These senior resources often have the knowledge of the technology and market to create a playbook.

There are several key things to consider in getting the process started and completing a playbook:

1. Assign a leader within the organization with the accountability and responsibility to get a playbook created.
2. Rather than deciding to create a series of many plays – start small. Begin with one play and commit to driving it across the company.
3. Drive the process at an executive level to ensure all groups – sales, marketing, business development, pre-sales, and delivery – understand the importance of the playbook.
4. Task the delivery and technical team with creating the required services to support the plays. Many organizations make the mistake of allowing marketing or sales to create services to support the plays, a strategy that often results in services that are undeliverable.
5. Make the plays in the playbook the center-piece of sales training efforts and integrate the content into sales meetings where appropriate.

Key Elements of the Playbook

The Play and Position

In order to score points or move the ball down field, you have to run a play. For solution providers, this means having a plan and a solution packaged to give the sales team something to sell and provide the technical team a focus with which to solve a customer's challenges. It's also important to know your field position. For a solution play this means understanding the current customer situation – the customer pain and the need.

The best plays are directly aligned with some urgent customer need. They can be broadly focused on an industry or hyper

focused on a particular buyer. For example, a play targeted toward a CFO may be defined broadly as “Cost Cutting Through Cloud Computing” and the goal might be to sell the CFO or CEO a consulting engagement to determine if cloud computing can save the firm money. Plays can be very specific and focused as well. A play targeted toward the head of infrastructure or someone responsible for storage could be “Cloud-based Backup & Recovery”.

Critical questions to ask yourself when creating a play;

1. Does the play address a customer's search for a resolution to a compelling issue or problem?
2. Is there a clear and defined “outcome” for the play? A solution that will be proposed or a consulting engagement that will be recommended, for example?

Key elements to document when defining a play:

Problem/Needs Definition – Define the problem or needs in clear and high level terms. What are the challenges customers are facing or what is the key technology trend forcing users to change the way they approach their environment? Specifically, identify and document the customer pain related to these challenges and a needs definition describing what the user is trying to achieve.

Key questions to ask in creating this section of the playbook:

1. How do your customers typically address this challenge today?
2. What are the negative impacts of a poor or inefficient approach to this challenge?
3. What functionality would your customer like to deliver to its users but cannot?
4. What business benefits could your customer achieve if they could address this challenge?

The Game Plan

The next part of the playbook consists of a combination of defining a solution, understanding the motivation of the target audience, and developing the list of questions you'll use to qualify, scope, and sell the solution.

Solution/Use Case Definition – Describe crisply the solution and its benefits to the customer. This should read a bit like an elevator pitch that sales teams can use to tele-prospect and to elicit interest in customer interviews.

Audience Definition – Define who within the customer organization will be most interested in the solution and define their unique motivations. For example, CFO's will be more driven by the financial benefits of a solution or cost savings,

whereas the head of IT might be more motivated by operational efficiencies for the staff.

Prospecting Questions – Develop the key questions – and answers – your sales teams will need to handle customers’ concerns about the technical solution, the business impact aspects of the solution, and the size and scale of the solution.

Key questions to consider when developing this section of the playbook:

1. What does the final solution look like?
2. What are the major business and technical benefits?
3. What is the financial impact of the solution?
4. Who is impacted by the solution? And what do they care about? How do the benefits apply uniquely to them?
5. How do you determine stakeholder challenges and what matters most to them?
6. How would you price the solution?

The Toolkit

To execute the play and make it successful, you’ll need the right combination of trained team members, supporting services, and proof points for sales teams to leverage during the sales cycle.

Team Members – Different plays require different players. Some plays will be able to be executed via telesales, such as renewals on cloud and MSP services. Other plays will require deep support from technical staff, business development managers, and even delivery teams. Define the roles and levels of support you’ll need both pre-sales and post sales. This will help align success in selling the solution as well as in staffing the proper post sales resources for delivery.

Supporting Services – Aside from repeatability, nothing drives the profitability of a play more than value-add services. Services also create unique competitive advantage around the solution. Task delivery teams with developing the appropriate service offerings from up-front consulting through implementation and management of the solution.

Proof Points – Case studies, success stories, solution reference architectures, and deliverables documents from previous services engagements all provide powerful materials for your sales team to leverage during the sales cycle. Include these, as well as sample SOW’s for services engagements in your playbooks. Train sales and technical teams to review SOW’s and project plans as ways to scope the size and scale of major projects. For success stories and case studies, leverage a simple model of story telling organized around illustrating the business, operational, and financial impact of your solution.

Leveraging the Playbook

To fully realize the advantages of your playbook and playbook processes, make playbook materials the centerpiece of your sales training activities and use the raw, proof point materials, to drive marketing campaigns. In addition to driving sales execution, building a playbook can serve as a key input into corporate marketing strategy and a major proof-point to vendors that you deserve your unfair share of attention and support.

While creating a sales solutions playbook can be a daunting effort, you are not on your own. To assist you in developing a portfolio of plays, CompTIA has developed a series of model plays. These can be used as the starting point to building out your own portfolio. Visit the CompTIA Member Resource Center at <http://www.comptia.org/members> to download a playbook template.

About CompTIA

CompTIA is the voice of the world's information technology (IT) industry.

As a non-profit trade association advancing the global interests of IT professionals and companies, we focus our programs on four main areas: education, certification, advocacy and philanthropy. We:

- Educate the IT channel: Our educational resources, comprising instructor-led courses, online guides, webinars, market research, business mentoring, open forums and networking events, help our members advance their level of professionalism and grow their businesses.
- Certify the IT workforce: We are the leading provider of technology-neutral and vendor-neutral IT certifications, with more than 1.4 million certification holders worldwide.
- Advocate on behalf of the IT industry: In Washington, D.C., we bring the power of small- and medium-sized IT businesses to bear as a united voice and help our members navigate regulations that may affect their businesses.
- Give back through philanthropy: Our foundation enables disadvantaged populations to gain the skills they need for employment in the IT industry.

Our vision of the IT landscape is informed by more than 25 years of global perspective and more than 2,800 members and more than 2,000 business partners that span the entire IT channel. We are driven by our members and led by an elected board of industry professionals.

All proceeds are directly reinvested in programs that benefit our valued members and the industry as a whole. Headquartered outside of Chicago, we have offices across the United States and in Australia, Canada, China, Germany, India, Japan, South Africa and the United Kingdom. For more information, visit comptia.org.

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