Developing Sales Playbooks from Journey Maps

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EXECUTIVE SUMMARY

Building a Sales Playbook can be an overwhelming process. Just finding the data needed to create a complete, beneficial Playbook alone can cause a conundrum as most organizations overlook the importance of segmenting by industry, territory and/or product.

By creating well-defined Customer Journey Maps for each buyer persona that engages with your organization, the project of constructing a Sales Playbook becomes less daunting. The reason for this is that the Customer Journey Map, if completed thoroughly, provides you with a plethora of quality data on each buyer persona and their likely relationship and purchasing patterns.

This How-To Guide has been designed to help you and your company build, implement and operationalize Sales Playbooks based on Customer Journey Map data.

CUSTOMER JOURNEY MAPS

Customer Journey Maps are detailed definitions of all the actions that buyers take and the interactions they have from the initiating Trigger Event through to a completed purchase. These maps cover all the channels, physical and digital as well as the device platform, and the buyer personas involved at each step. Journey maps are frequently defined by industry, by revenue tier (F100, F1000, SMB, SOHO, etc.), and geography. The latter is important because cultural differences will result in different journey maps for the same industry and buyer-personas; there is no one-size-fits-all global journey map.

While the actual format of the journey map may vary by company and/or the group developing them, there are two constants:

1. Maps should be created through the lens of the buyer, not the seller.

2. Maps document, in detail, every action the buyer takes across all touch points, over a relationship's lifetime.

Each action mapped should include, at a minimum, the following information:

- Description of the action.
- The specific information sought or shared as part of the action
- Through which specific physical-virtual channel(s)
- The buyer's expectation(s) and feelings
- The desired outcome(s) of the action
- Whether the action was a tollgate or related to a specific tollgate
- Who was involved in the action (Persona-roles)

The key to developing actionable journey maps is through the lens of the buyer. The best and most expedient way to do that is through qualitative or ethnographic research.

Once all the data has been gathered and the patterns, as well as any anomalies have been identified, arrange the buyers' actions longitudinally. Group activities together and assign descriptive step names to each group. For instance, buyers may undertake a number of activities to determine best practices and how their peers have addressed their problem or opportunity. This is a logical grouping that forms a step. The same is for requirements definition, the RFP process, contract negotiations, end-user training, vendor performance evaluation, etc.

The more detailed and complete the journey map information, the more effective the resulting Sales Playbook will be.

SALES PLAYBOOK

Journey maps are powerful tools to help sales qualify an opportunity and navigate the prospect's processes. By developing Playbooks based on journey maps, sales can improve their close rates and forecast predictability as well as build a more credible, trusted relationship with prospects and customers.

Most organizations develop Playbooks in a one-size-fits-all model for their entire sales force. Companies with different sales teams focused on different segments – size of company, industry, or geography – find their sales teams pick and choose portions of the Playbook to use. Playbooks should align to how sales teams are structured in order to provide relevant guidance in the day-to-day reality of how they conduct their jobs.

Optimally, Playbooks should be developed for each specific sales team by market segment. If there is a team that calls on CFOs in hospitals with over 100 beds, they need a tailored playbook which is different from the one an inside sales team uses calling on directors of IT for discrete manufacturers. Even if the journey maps are not materially different from one segment to the next, Playbooks should be tailored for each sales team to increase relevance and sales adoption.

Before diving in and developing Playbooks, confirm the elements of the Playbook with sales leadership to ensure the tool will be used and seen as a valuable asset versus a procedural requirement.

Sales Playbooks should include the following:

1. **Market Segment**

    - Market profile
    - Industry drivers
    - Business issues
    - Pain chain
    - Vendor messages and differentiators

2. **Target buyer persona-role(s)**

    - Profile
    - Priorities
    - Discovery guide
    - Qualification questions

- Experience Expectations by Journey stage

3. **Scoring the Opportunity**

4. **Navigating the Journey Map**

    - Step-by-step sales actions aligned to the journey map and tollgates

        - Discovery conversation guide
        - Objection handling
        - How to enable the buyer (content and tollgate maps)

While the list may seem long, the playbook doesn't have to be. The more concise and actionable the information is, the higher the adoption rate. Keys to success are the relevancy and currency of the content, not how slick the document looks. The format of the Playbook should be one Sales teams are comfortable with – PowerPoint, in a cloud app, Word document, flash cards, etc.

LEVERAGING JOURNEY MAPS

Playbooks have traditionally been focused on marketing's messages and product marketing's go-to-marketing plan; a very 'inside-out' approach. Basing Playbooks on journey maps grounds the tool in an 'outside-in' approach that increases the effectiveness and productivity of each sales person. It gives the sales person a clear roadmap of what to do and when based on where the buyer is in their journey and their expectations at that time.

To begin developing a journey-based Playbook, develop a cross-reference of Playbook elements with the available journey map data. There is a direct correlation between the effectiveness of a Playbook and the quality and depth of the journey maps. Below is a sample cross-reference between journey map data and a Playbooks' table of contents.

Sales Playbook Elements	Journey Map Data
1. Market Segment Description	• Target outcomes • Business drivers • Messaging and benefits statements
2. Target buyer persona-role(s)	• Role priorities • Expectations by journey stage • How trust and credibility are built • Definition of value

	• Tone, language, channels
3. Scoring the Opportunity	• Stage when prospect engages sales • Criteria of short-listing vendors and final selection • Weight assigned to relationship, features and price
4. Navigating the journey map	• High level journey map • Tollgate map by journey step including recommended vendor tools, content, etc. • Actions that sales (and marketing) can take at each step • Common objections, concerns and perceived risks by stage • Relationship expectations by step • Content and channel map by journey step

Once the cross-reference has been completed, a sub-team should be tasked with researching any missing information and spotting where the data is too generalized to be actionable.

The draft Playbook should then be tested. Collaborate with sales leadership to identify two sales people from each sales team to test the Playbook(s) with new prospects or leads. If possible, have a team member or a product marketer shadow the sales person to observe how well the Playbook serves the needs of the sales person and the situations they encounter. Marketing should also evaluate if the journey map data presented in the playbook is at the right level of detail. Journey maps are frequently summarized at such a high level in the interest of brevity that the nuances of the steps and buyer actions are lost. Equally, too much detail on the journey steps can overwhelm the sales person and discourage use of the Playbook.

The timeframe for testing the draft Playbook should range between three weeks and two months. At the end of the test a one-day workshop should be conducted that includes the marketing team, sales enablement, sales persons involved in the test and sales leadership. The agenda should include the following topics:

- Overall feedback on the Playbook
- Situations where the Playbook was most effective
- Situations that were not adequately covered by the Playbook
- Missing, incomplete or incorrect data or topics
- Playbook layout and content recommendations

- Training recommendations

ACTION PLAN

In order to create your Sales Playbook based on Customer Journey data, follow these steps:

1. **Complete a Customer Experience Management Assessment.** This assessment assists you in evaluating your organization's capabilities when it comes to overall Customer Experience Management. Creating this baseline enables you to better understand your customers and the lifecycle they experience with your company.

2. **Use our Customer Journey Map to identify the touch points and lifecycle associated with your customers' journey (experience) with your company.** With a clear guideline of each buyer persona's experience with your organization, you can identify any weaknesses in your customer experience management and prepare yourself to improve the sales journey.

3. **Download the Sales Playbook Template.** Utilize the data gathered from the activity of creating your Customer Journey Map to complete the playbook in its entirety.

4. **Review our Sales Enablement Plan Methodology and Sales Training Plan Methodology** to gain a better understanding of how to implement a Sales Playbook into your sales process.

BOTTOM LINE

As prospects and customers embark on their self-directed purchase journeys, the vendor sales' relationship must change from creating and filling a need to one of a partner and coach. A new approach to developing an "outside-in" Sales Playbook is needed to effectively enable and train sales resources. **Only by understanding and aligning sales' activities to the buyer-personas journey and expectations can companies be successful and drive revenue growth.**

ABOUT THE RESEARCH ANALYST

Christine Crandell is a B2B strategy, marketing and transformation expert who helps CEOs, CMOs, CROs, COOs and investors accelerate revenue growth.

She leads a team of seasoned marketing and sales professionals with deep experience in strategy development and operationalization, corporate marketing, go-to-marketing planning, organizational development and coaching, and customer-centric transformation.

It is from her 20+ years of marketing and strategy experience that she developed the Sellers Compass™ methodology for transforming organizations into customer-aligned businesses and accelerating revenue.