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**HIGH  
PERFORMANCE  
SALES  
PLAYBOOK**

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# Introduction

Organizations need a sales playbook, an outline of methodologies and tactics designed to help them consistently achieve and exceed revenue goals.

But it needs to be more than a piece of paper on the desk or a document sitting in the cloud.

The best playbooks are living documents. They create a clear, consistent, and sustainable methodology that allows you to achieve revenue goals through purposeful and intentional culture, structure, marketing, and sales efforts.

# Company Culture

Your company culture is very important to how your team sells, how your prospects buy, and how your clients experience what you have sold them.

Your company culture defines who you are as an organization, why you serve the industry you do, and what you hope to accomplish long term.

## DEFINE

- Mission
- Vision
- Values

**Never overlook the power of a strong message, though your message is only the beginning.**

# Team Development

In order to build and maintain a high-performance sales team, you should begin by defining the necessary characteristics for each role. From there, you can create the process to locate, hire, and develop each member in order to set them up for success individually and corporately.

**1**

## ROLES

List all sales-related roles that currently make up your team as well as roles you seek to fill

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**2**

## SUCCESS METRICS

Describe the metrics you will use to measure success for each team role

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**3**

## HIRING

List your internal and external sources for recruiting, create your multi-step interview process, as well as your process for hiring new team members

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**4**

## SPRINTING TO SUCCESS

Create an effective onboarding, training, and initial development process

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**5**

## SUSTAINING SUCCESS

Include your ongoing training and development systems, processes, timeliness, and metrics

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# Sales and Business Development

Achieving sales success requires an authentic and attractive brand, clear and compelling messaging, as well as consistent and professional execution.

## Branding

### Personal Brand Building

- This includes your purpose, passions, and principles as well as the big question “What do you want to be known for?”

### Personal to Corporate Brand Alignment

- This describes how your personal brand aligns with your companies corporate brand as well as how others can achieve similar alignment.

## Prospecting

### Ideal Client Profile

- Describe your ideal client in as much detail as possible.

### Scripts

- Include your basic intro/30-second “elevator pitch”, requests for various meetings, and any other dialogue you would regularly repeat.

# Sales and Business Development

## Tools and Processes

### Lead Management

- This is how you manage your prospects with the proper data as well as your engagement flow and could be a digital resource or hard copy document.

### 21 Day Prospect Pursuit

- Once a new prospect is identified, this is your initial outreach process and includes specific actions and timelines.

## Sales Methodology

### Client Conversion

- This is your complete client conversion journey and includes how and when you will communicate with them, what you will say, and how you will ensure a client win.

## Referrals

### Referral Training

- This is your internal process to create referrals from clients, colleagues, COIs, and more

### Referral Strategy

- This is how you will identify, request, reach out to and follow through on referrals sent to you or generated by you

# Next Steps

Additional topics that may be included in your Playbook

- 01 \_\_\_\_\_ Building trust with Prospects,  
Clients, and COIs/Partners
- 02 \_\_\_\_\_ Social media engagement strategy
- 03 \_\_\_\_\_ Successful Meeting Prep
- 04 \_\_\_\_\_ High Performance Productivity



# Let it Breathe

Consider every item shared in this playbook.

Each is important to your **success**.

But as was shared from the beginning, this sales playbook must be more than a static document.

**IT HAS TO LIVE AND IT  
HAS TO BREATHE.**

When you put your heart and soul into your playbook, and bring your team(s) along with you for the ride, you will find more success than you thought possible!

# Let's Build it Together

A playbook of this size and stature can be a daunting task. But it is not one you have to take on alone. That's where my team and I come in.

Our combined sales, marketing, and overall business experience and expertise will enable you to create a sales playbook sure to set you up for success. We will work with you to lay the groundwork, develop each area, and even execute the playbook with you and your team.

## Are you ready to take action and create the playbook that will help to produce a high performance sales team?

Book a Discovery call to learn more.

<https://calendly.com/ryanjamesmiller/discovery>



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