

# How to Build a Sales Playbook Salespeople Love (and Use)



If you want to teach people a new way of thinking, don't bother trying to teach them. Instead, give them a tool, the use of which will lead to new ways of thinking.

Buckminster Fuller

American author, inventor & systems theorist

# INTRODUCTION



Today's sales leaders face formidable challenges in their quest to achieve increasingly aggressive growth targets, and there is very little margin for error. The markets you sell into are saturated with competitors with seemingly identical value propositions. And your buyers have more power and are more hesitant to budge from their current state than ever.

The stories of fast-growth companies that fizzle and market leaders that falter are well documented. To realize sustainable, scalable, and predictable sales success, it's not what but how your sales team sells that matters. Enabling that 'how' is where a sales playbook comes in.

## In this guide you will learn:

- Why a sales playbook is the key to effective Sales Enablement
- The mission of a sales playbook
- Why a sales playbook should be your top Sales Enablement priority
- The six sales playbook types
- Why a sales process playbook is the optimal approach
- The critical difference between a 'documented sales process' and a sales process playbook
- The anatomy of a great sales process playbook
- The role of technology in driving playbook utility and adoption

# HOW TO BUILD A WORLD-CLASS SALES PLAYBOOK

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# SALES PLAYBOOKS DRIVE SALES ENABLEMENT



# 1. SALES PLAYBOOKS DRIVE SALES ENABLEMENT



## Sales Playbook is the Sales Enablement Critical Success Factor

70%. That's the percentage of Sales Enablement programs that did not meet or exceed all or the majority of expectations (CSO Insights).

This guide is written from the perspective that implementing a *Sales Playbook Program* is the single most important initiative Sales Enablement practitioners can take to improve their effectiveness and performance. To buy into this point-of-view and realize the full potential of a sales playbook program will require a mindset shift relative to how you think about a sales playbook.

- A sales playbook is not a sales tool. A battle card is a sales tool. An ROI calculator is a sales tool. A playbook, as we will see later in the guide, is designed to drive best practices throughout the sales process. Sales tools are point solutions that are typically stage-specific. The playbook is in essence the Sales Enablement 'platform' into which sales tools plug in.
- Sales-playbook-as-a-service. Because until now PowerPoint has been the primary delivery format for playbooks, we have had no choice but to think of a playbook as a document instead of as an ongoing service. A programmatic approach to playbook development, deployment and maintenance forces you to plan and schedule exactly what you need to do to continually iterate and reinforce the best practices embedded in the playbook. Leveraging technology further enables the playbook-as-a-service model.

# 1. SALES PLAYBOOKS DRIVE SALES ENABLEMENT

Sales playbooks are the foundation of Sales Enablement

The Sales Playbook is the foundation for all of your other Sales Enablement initiatives. Your playbook can be the basis for the bulk of your onboarding, training, and reinforcement content.



# 1. SALES PLAYBOOKS DRIVE SALES ENABLEMENT



## What is 'Sales Enablement'?

To appreciate the critical role playbooks play in Sales Enablement and how to leverage them to drive effective Sales Enablement, we first need to define what we mean by 'Sales Enablement' and consider how this definition has evolved to more precisely address the needs and challenges of the modern sales organization.

Google 'Sales Enablement definition' and you'll get 172,000 results. Here is the problem with 171, 999 of these. Whether it's a Sales Enablement practitioner or pundit, most think of Sales Enablement as "Salesperson Enablement". Here's proof.

Sales enablement is a strategic, ongoing process that equips all client-facing employees with the ability to consistently and systematically have a valuable conversation with the right set of customer stakeholders at each stage of the customer's problem-solving life cycle to optimize the return of investment of the selling system

This definition comes courtesy of Forrester circa 2010 and is still to a very large extent the conventional wisdom.



# 1. SALES PLAYBOOKS DRIVE SALES ENABLEMENT



## Sales Force Enablement

Because the role of the frontline sales manager is crucial to the success of any Sales Enablement program, any definition of 'Sales Enablement' needs to take this into account. Enter the good folks at CSO Insights. In late 2016 they raised the ante for Sales Enablement professionals by introducing the concept of 'Sales Force Enablement':

Sales Force Enablement is a strategic, cross-functional discipline designed to increase sales results and productivity by providing integrated content, training and coaching services for salespeople AND frontline sales managers along the entire customer's journey powered by technology

They nailed it. They position the function of Sales Enablement as strategic - an important and necessary distinction. They establish its mission to be driving measurable impact on sales performance. They emphasize its dual role of serving salespeople and frontline managers. Like Forrester, they intimate that Sales Enablement needs to provide guidance and tools to facilitate the buying process. Lastly, they call out the critical role that technology plays in enabling enablement. Brilliant!

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## SALES PLAYBOOK PURPOSE



## 2. SALES PLAYBOOK PURPOSE

Shift from everyone doing their own thing to everyone doing the best thing



SOURCE: EDUCATION WEEK

## 2. SALES PLAYBOOK PURPOSE



### Sales Performance Optimization

The number one objective of a sales playbook program is to improve sales performance.

At a high-level, this means aiming to impact the metrics that executive and sales leadership care about most: quota achievement and forecast accuracy.

At a more granular level, this can mean focusing on improving win rates of forecasted deals, increasing average deal size, or compressing sales cycles.

### Sales Behavior Optimization

The overarching Sales Enablement goal from a change management perspective is to shift behavior from everyone doing their own thing to everyone doing the best thing.

Whether a sales organization has 20, 200, or 2000 salespeople, inevitably, there is a subset of top performers whose behavior you wish you could clone.

The purpose of a playbook program is to capture, codify, and institutionalize the best practice behaviors of these top performers. Simply put, a sales playbook defines and illustrates the best way to sell at your company,

## 2. SALES PLAYBOOK PURPOSE



### Move the Middle

Your middle-of-the-pack reps are the primary target audience for your playbooks. The goal is to make it easy for this group to consistently replicate the best practices of your top performers.

By enabling them to more consistently execute your sales strategy, sales process, and top performer best practices, you can drive higher win rates, average deal sizes, and percentage of reps at plan, as well as reduce sales cycles from this group.

Improving the performance of your average reps has a disproportionately positive effect on driving overall sales organization quota achievement than improving the performance of your laggards or top performers.

## 2. SALES PLAYBOOK PURPOSE



### Accelerate New-Hire Time-to-Productivity

New-hires are also a core audience and primary beneficiary of a playbook.

Getting immediate access to what your top performers say, ask, do, and use at each stage of your sales process can compress their time-to-productivity by weeks or months.

According to CSO insights, in a complex sales environment, close to 50% of companies reported ramp up times of 10 months or greater. They also noted that new-hire ramp up has increased over the last decade.

Compressing the length of time it takes a new rep to achieve full productivity can have a significant impact on current year results, especially if you experience unexpected turnover.

## 2. SALES PLAYBOOK PURPOSE



### Help the Best Crunch Their Numbers

Your top performers also benefit from playbooks because they gain access to the best practices of other high achievers. These are strategies and tactics that they might not have considered and can now add to their arsenal.

Moreover, by having a reference guide, they increase the consistency of application of their own as well as their colleagues' best practices.

While they are not the main audience, time and again, high achievers are often the most open to playbook initiatives because part of what makes them top performers is their drive to continually get better at their craft.

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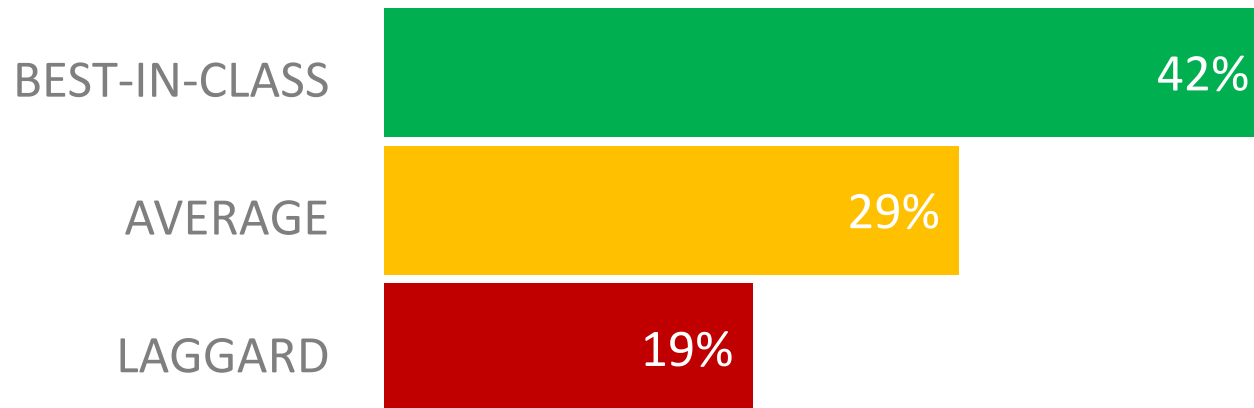
# WHY A SALES PLAYBOOK SHOULD BE YOUR TOP SALES ENABLEMENT PRIORITY





### 3. WHY SALES PLAYBOOK SHOULD BE TOP PRIORITY

Top performing sales organizations use playbooks



Percentage of companies in the performance category that use sales playbooks

SOURCE: ABERDEEN RESEARCH

# 3. WHY SALES PLAYBOOK SHOULD BE TOP PRIORITY



## Sales Performance Impact

Playbooks move the needle. The best performing sales organizations implement sales playbooks at a higher rate than their peers. According to Aberdeen, sales organizations that implement playbooks have:

- 10% shorter sales cycles
- 12% higher number of reps achieving quota
- 7% greater revenue growth

A compelling case for building a playbook to optimize sales organization wide effectiveness and performance is to consider what might happen if you don't. Here is a collection of statistics that don't paint a pretty picture of the current state of affairs for all too many sales organizations.

- 80% of sales conversations are considered a waste of time - Forrester
- Win rates of FORECASTED deals are less than 50% - CSO Insights
- Only 29% of new reps hit year one performance milestones - Rain Group
- Only 57% of salespeople achieve their target - CSO Insights

# 3. WHY SALES PLAYBOOK SHOULD BE TOP PRIORITY



## Sales Strategy Execution Impact

A quality sales playbook outlines the processes and practices that need to be followed and the decisions that need to be made to effectively execute your company's sales and go-to-market strategies.

Great sales playbooks translate the ambitions declared and decided in the boardroom into specific tactics and direction the sales organization can execute in the field.

Developing a sales playbook is the single most important initiative a head of sales needs to put in place in order to operationalize the best way to sell and manage at their organization.

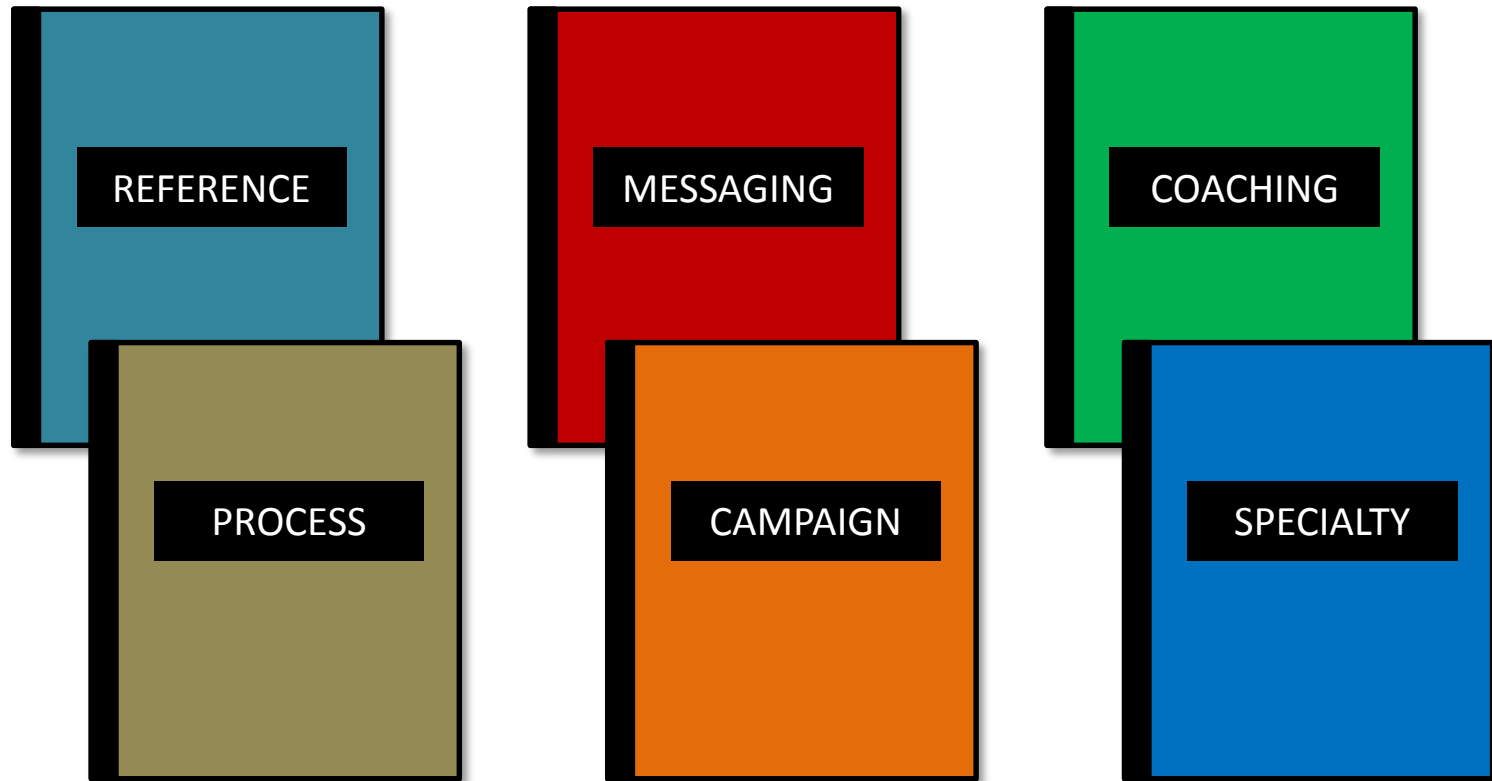
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## SIX SALES PLAYBOOK TYPES



## 4. THE SIX SALES PLAYBOOK TYPES



# 4. THE SIX SALES PLAYBOOK TYPES



## The Reference Playbook

This type of sales playbook includes everything a rep needs to get their job done. These playbooks include topics like:

- Introduction to the company and sales organization
- Sales team roles and responsibilities
- Buyer personas
- Product and pricing
- Territory management
- Time management
- How to use the CRM
- The commission plan
- Sales process
- Key activity metrics and targets
- Competition
- Objection-handling

# 4. THE SIX SALES PLAYBOOK TYPES



## The Messaging Playbook

These playbooks define how to best prepare and conduct conversations that help salespeople gain attention, engagement, and traction with target buyers. They typically include tools like:

- The ideal customer profile
- The target buying audience
- Individual target buyer profiles
- Discovery question guides
- Initial conversation framework and talk track to uncover and develop buyer needs and articulate value and differentiation
- Success stories
- Competitive strengths and weaknesses
- Objection-handling guides

# 4. THE SIX SALES PLAYBOOK TYPES



## The Coaching Playbook

Earlier, we emphasized the importance of sales manager enablement. A coaching playbook is central to this objective and is designed to help frontline sales managers understand and execute critical sales management processes to drive optimal team performance and engagement.

It typically includes a series of frameworks and tools that form “how-to” guides for key sales management disciplines based on organizational and/or industry best practices.

- Territory management/QBR templates and discussion guides
- Pipeline and deal review discussion guides
- Account management planning discussion guides
- Deal management discussion guides
- Forecast management assessment guides
- Talent assessment and development guides
- Coaching feedback guides
- Behavioral interviewing guides



## 4. THE SIX SALES PLAYBOOK TYPES



### The Campaign Playbook

A campaign-focused playbook can be used by Inside Sales organizations to drive execution of prospecting campaigns. By definition, these types of playbooks will have shorter shelf lives than the others mentioned in this section.

Here's an example: the leader of an SDR team might choose to run a two-week lead generation campaign focused on a specific buyer persona in a specific vertical at companies with a specific employee size range. Content could include:

- Target buyer profile
- Prospecting templates
- Cold calling talk track
- Initial conversation and discovery talk tack
- Objection-handling guide
- Industry market collateral

# 4. THE SIX SALES PLAYBOOK TYPES



## The Sales Process Playbook

This type of playbook focuses on helping reps and managers consistently apply deal, conversation, and forecast management best practices and tools at each stage of their sales process. These types of playbooks include topics like:

- The buyer journey
- The sales process overview
- Stage-specific best practices
- Stage-specific exit criteria
- Stage-specific sales tools
- Stage-specific skills tips
- Forecast category definitions and criteria
- Discovery talk tracks
- Qualification checklists

# 4. THE SIX SALES PLAYBOOK TYPES



## Specialized Playbooks

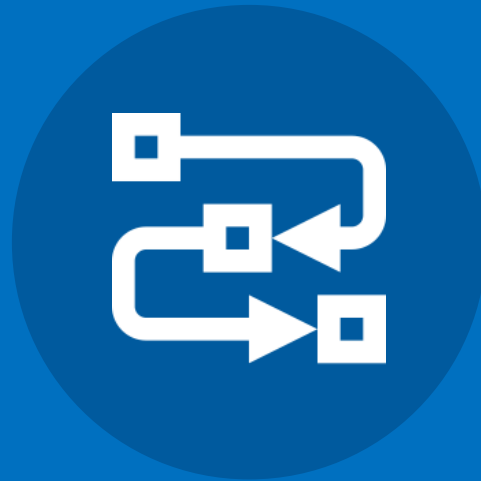
You can further specialize any of the playbook types by:

- Role: Inside Sales, Field Sales, and Customer Success
- Segment: Industry and/or company size
- Product: Solution category or use case

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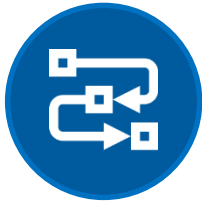
# WHY A SALES PROCESS PLAYBOOK IS THE OPTIMAL APPROACH



Even experts need checklists –  
written guides that walk them  
through the key steps in any  
complex procedure.

Atul Gawande  
Surgeon & author *Checklist Manifesto*

## 5. WHY A SALES PROCESS PLAYBOOK IS OPTIMAL APPROACH



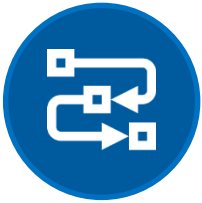
So given the variety of sales playbook options, why is a sales process playbook your best bet and, in our perspective, all you need?

Sales process prowess is the critical success factor. The research is clear: Sales process execution excellence, the ability to define, execute, reinforce, monitor, and evolve a repeatable sales process, is the single most important enabler of sustainable, scalable, and repeatable sales success. As such, driving sales process execution excellence should be the primary focus of your Sales Enablement program.

Sales process is the ultimate playbook framework. We listed reference, messaging, coaching, campaign, and specialty playbooks as the playbook options at your disposal. Done right, a sales process playbook to a very large degree encompasses all of these. Most of the tools/content mentioned for each of the various playbook types can be categorized by sales process stage.

Sales process is the ultimate sales coaching framework. When used during deal and pipeline reviews and forecast calls, the sales process provides the perfect construct to guide managers to systematically assess and develop their reps' deals, pipelines, forecasts, skills, and knowledge.

# 5. WHY A SALES PROCESS PLAYBOOK IS YOUR BEST BET



## Sales Enablement = Sales Process Enablement

If you read between the lines of the definitions of 'Sales Enablement', they are all aiming to drive sales process execution excellence.

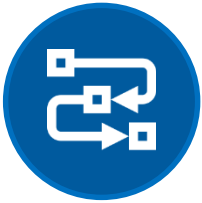
- Forrester: "... at each stage of the customer problem-solving lifecycle..."
- CSO Insights: "... along the entire customer's journey..."

These definitions emphasize the importance of enabling *stage-specific* excellence.

Each sales process stage requires a unique set of skills, knowledge, activities, tools, and milestones whose use and mastery enable progression to the next stage.

Therefore it follows that your chief role as a Sales Enablement leader is to equip your reps and managers with the tools and training they need to successfully navigate each stage of your sales process.

# 5. WHY A SALES PROCESS PLAYBOOK IS YOUR BEST BET



## Current State: Sales Process Suboptimization

Suboptimization is defined as a situation where a process, procedure, or system yields less than the best possible outcome of output, caused by lack of best possible coordination between different components, elements, parts, etc.

(Business Dictionary)

Sadly, sales process suboptimization is the reality for the vast majority of sales organizations.

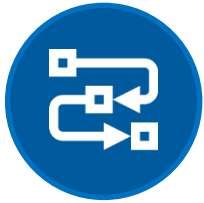
For over 20 years, CSO Insights has conducted an annual *Sales Performance Optimization* study in which they research and analyze study participants' sales process maturity.

Year in and year out, they find that something like 85% of sales organizations self-report (admit) that they do a poor job of documenting and implementing a sales process.

A well-constructed and managed sales process playbook can help fix this.



# 5. WHY A SALES PROCESS PLAYBOOK IS YOUR BEST BET



## Sales Process Prowess Pays Off

The more disciplined a sales organization is in the formalization and execution of its sales process, the bigger the impact on meaningful metrics like percentage of reps at plan, quota achievement, win rates for forecasted deals, forecast accuracy, average deal size, and sales cycle duration.

## Where Are You Now? Sales Process Maturity

CSO Insights defines four levels of sales process maturity,

- Level 1: Random Process: Company lacks a single sales process. Essentially, everyone does their own thing.
- Level 2: - Informal Process: A company has a documented sales process, but its use is not monitored or reinforced.
- Level 3: Formal Process: A company regularly reinforces a documented sales process, monitors its effectiveness, and evolves it as necessary.
- Level 4: Dynamic Process: A company dynamically monitors and continuously provides feedback on the use of its sales process and iterates it when necessary.

## The Verdict

Unless you are one of the rare Level 4 sales organizations, your primary Sales Enablement objective and focus should be developing and delivering a sales process playbook to drive sales process execution excellence.

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# DOCUMENTED SALES PROCESS VS SALES PROCESS PLAYBOOK



# 6. DOCUMENTED SALES PROCESS VS SALES PROCESS PLAYBOOK



## A Documented Sales Process Is Not Enough

Huh? Didn't you just make the case that a documented sales process is the key enabler of sales process execution excellence? Let me explain.

Ask any sales leader, *"Do you have a documented sales process?"* and unless they're in charge of one of those wild and wooly Level One sales organizations where everyone does their own thing, they'll respond, *"You betcha!"*

Here's the problem.

Dig a little deeper and what you'll find is that the documentation of their sales process consists of a PowerPoint slide that outlines stages and exit criteria. Useful, but not sufficient.

ACME SALES PROCESS				
1	2	3	4	5
VALIDATE	DISCOVER	PRESENT	PROPOSE	NEGOTIATE
<b>Goal</b> Validate deal is real, worth pursuing, and credible and if qualified, signed agreement for further exploration	<b>Goal</b> Explore, expand & confirm path/pipeline of current situation and use cases that lead to our unique capabilities	<b>Goal</b> Prepare and conduct demo and presentation that addresses gaps/risks and use cases identified in Discovery stage and confirm value/differentiation	<b>Goal</b> Co-develop business case with prospect & gain agreement on solution impact and verify that all comments necessary to close the deal are identified & resolved	<b>Goal</b> Negotiate/sign win-win agreement and align internal team to ensure optimal implementation kickoff
<b>Success Criteria</b> 1. Leads are systematically addressed within 48 hours 2. Opportunities are fully qualified regarding next fit, budget & timeline 3. We understand the buying process and competitive landscape 4. Potential champion identified 5. Strategic Partner identified	<b>Success Criteria</b> 1. We have an in-depth understanding of prospect's current state and use cases 2. We have shed light on the real/true situation 3. We have interviewed & engaged key stakeholders & understand each of their business, technical, and personal aims 4. Key stakeholders have agreed to participate in a technical discovery and see a demo 5. Key stakeholders have validated our value fit & differentiation and agreed to move forward a proposal	<b>Success Criteria</b> 1. We have established our value and differentiation and have established our capabilities as the ideal solution criteria 2. We have demonstrated and gained agreement from the business and technical buyer that we are the best solution for their specific use cases 3. Key stakeholders have validated our value fit & differentiation and agreed to move forward a proposal	<b>Success Criteria</b> 1. Appropriate internal stakeholders have validated & approved project scope 2. Potential roadblocks, open tech issues & competitive threats to deal closure are identified & addressed 3. We have confirmed that competition has been eliminated & cleared verbal agreement is in place 4. Contract presented and/or have mapped the purchase process	<b>Success Criteria</b> 1. Negotiation strategy is formed & executed until all business terms are finalized & customer execution final contract 2. Implementation plan, requirements, resources & timelines are agreed and kickoff scheduled 3. Account team debriefed on customer goals and requirements before kickoff meeting scheduled 4. Deal closed and celebrated
<b>Tools</b> • Research Checklist • Executive Pitch Qualification Guide	<b>Tools</b> • Corporate Pitch Deck • Use Case Discovery Guide	<b>Tools</b> • Corporate Pitch Deck • Demo Guide • ROI/TCO Calculator • Competitive Benchmark	<b>Tools</b> • ROI/TCO Calculator • Reference List • Stakeholder Analysis • SOW Template	<b>Tools</b> • Close Plan Checklist • Win/Loss Review • Implementation Plan

# 6. DOCUMENTED SALES PROCESS VS SALES PROCESS PLAYBOOK




## Qualification is Not a Sales Process

Another common response to “*Do you have a documented sales process?*” is something along the lines that they use MEDDIC or some variation of it and out comes the one-pager describing the definition of each letter.

Let’s be clear. MEDDIC is not a sales process. MEDDIC, BANT, BANTA, CHAMP or whatever acronym you use is a QUALIFICATION process.

Having a common framework for qualification is essential and should be used early and often during a sales cycle. It’s an essential part of any sales process, but, in and of itself, is not a sales process.



### QUALIFICATION CHECKLIST

What indicates this is a qualified opportunity worthy of pursuit?

Topic	Business Criteria	✓
1 MOTIVATION	There is a known compelling event or driver compelling them to make a decision	
2 BUYING PROCESS	We are early in the buying process	
3 PROJECT	They have a sanctioned project and assigned resources to evaluate and implement a solution	
4 FAMILIARITY	The prospect is familiar with Acme through a reference, Gartner report or past experience	
5 NEED	There is an identified need for at least one Acme solution	
6 BUDGET	Budget has been allocated or can be and we understand budget process, if none exists	
7 TIMING	The prospect can make a decision to move forward within 2-6 months or our fiscal year	
8 DECISION	We know the decision process, timeline, and criteria	
9 STAKEHOLDERS	We know the names and roles of key stakeholders including who has final signoff	
10 ACCESS	We have access to a coach and Financial Buyer	
TOTAL SCORE		

# 6. DOCUMENTED SALES PROCESS VS SALES PROCESS PLAYBOOK



## The Opportunity Stages Picklist is Not a Sales Process

Another example of a “documented” sales process is the opportunity stages picklist in your CRM.

The danger in using the opportunity picklist as the primary means of defining your sales process is that you can get too granular.

The sample below is the default opportunity stage picklist in Salesforce.com. It represents an example of an overly granular approach.

Action	Stage Name	Type	Probability	Forecast Category
<a href="#">Edit</a>   <a href="#">Del</a>	Prospecting	Open	10%	Pipeline
<a href="#">Edit</a>   <a href="#">Del</a>	Qualification	Open	10%	Pipeline
<a href="#">Edit</a>   <a href="#">Del</a>	Needs Analysis	Open	20%	Pipeline
<a href="#">Edit</a>   <a href="#">Del</a>	Value Proposition	Open	50%	Pipeline
<a href="#">Edit</a>   <a href="#">Del</a>	Id. Decision Makers	Open	60%	Pipeline
<a href="#">Edit</a>   <a href="#">Del</a>	Perception Analysis	Open	70%	Pipeline
<a href="#">Edit</a>   <a href="#">Del</a>	Proposal/Price Quote	Open	75%	Pipeline
<a href="#">Edit</a>   <a href="#">Del</a>	Negotiation/Review	Open	90%	Pipeline
<a href="#">Edit</a>   <a href="#">Del</a>	Closed Won	Closed/Won	100%	Closed
<a href="#">Edit</a>   <a href="#">Del</a>	Closed Lost	Closed/Lost	0%	Omitted

# 6. DOCUMENTED SALES PROCESS VS SALES PROCESS PLAYBOOK



## Command & Control Limitation

A 'process-on-a-page', 'qualification = sales process', or 'CRM opportunity stage picklist' process documentation approach diminishes the utility of your sales process.

When stage exit milestones, qualification criteria or picklist items are the primary articulation of your sales process, by definition, your sales process is designed to do one thing: *help sales management command and control process compliance.*

While we buy into the notion that you need to 'inspect what you expect', this process design mindset limits the ability of your sales process to impact performance because it lacks a key ingredient: *guidance on how to sell more effectively.*

Enter the Sales Process Playbook.

# 6. DOCUMENTED SALES PROCESS VS SALES PROCESS PLAYBOOK



## Sales Process Playbook = Guided Selling & Coaching

Technically, a Sales Process Playbook is another form of documenting sales process. The key difference is the focus and depth of the documentation.

The focus of the previous versions of the documented sales process was to help managers inspect. The focus of a Sales Process Playbook is to guide reps to sell more effectively and managers to coach more effectively.

To accomplish this requires a detailed description of your sales organization's proven best practices at each stage of the sales process.

Here is our definition of a Sales Process Playbook.

A Sales Process Playbook captures and codifies what your top performers say, ask, do, and use at each stage of the sales process to guide salespeople on how to most effectively initiate, assess, advance, close, and grow sales opportunities, and enable sales managers to systematically coach their reps to do so

Checkers or chess? That's the distinction between a documented sales process and a sales process playbook. Unless your sales are highly transactional, you're playing chess.

# 6. DOCUMENTED SALES PROCESS VS SALES PROCESS PLAYBOOK



## Success Factor: Sales Process 2.0 Mindset

The term “process” can induce shivers down the spines of your reps and managers, so how you think about the concept of sales process will have a significant impact on the adoption, execution, and impact of your sales process. As such, it’s time to evolve your sales process mindset.

- Sales Process 1.0 focus is defining and enforcing a set of rules and exit criteria for each stage to track deal progress. The process is drawn up and governed by management for compliance. Reps get little value from this management-centric approach.
- Sales Process 2.0 focus is capturing and codifying top performer best practices at each stage of the sales process. This makes all the difference because now the process outlines the proven steps to successfully initiate, advance and close a sale. Instead of reps feeling they *have to* follow the sales process, reps *want to* follow it because doing so will give them the best shot at winning more often.

The Sales Process Playbook is the operating system for Sales Process 2.0.



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# ANATOMY OF A GREAT SALES PLAYBOOK



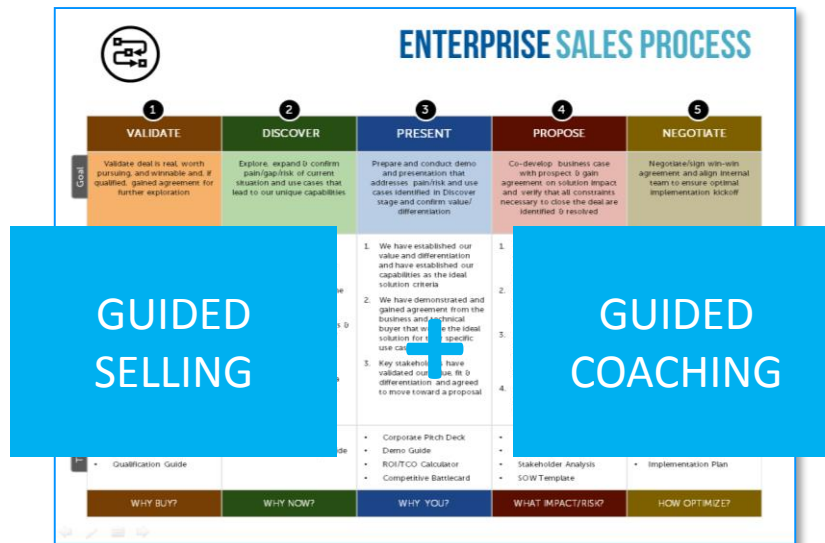
# 7. ANATOMY OF A GREAT SALES PROCESS PLAYBOOK



## Playbook Design Considerations

We have established the purpose of a Sales Process Playbook: To enable guided application of selling and coaching best practices at each stage of the sales process.

Let's now consider from a playbook design perspective, the best way to accomplish this.

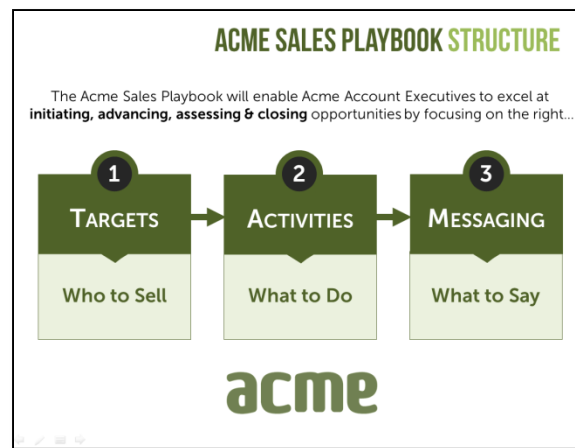


# 7. ANATOMY OF A GREAT SALES PROCESS PLAYBOOK

## Design Goal: Cover All the Bases

Your playbook should be organized and consist of content that will provide guidance in three critical areas: 1) who to sell, 2) what to do, and 3) what to say.

- Who to Sell content would include a description of the business and buyer characteristics that define your ‘Ideal Prospect’ as well as profiles of your target buyers.
- What to Do content includes a detailed description of your sales process and the best practice activities that your reps should carry out before, during, and after a call at each stage of your sales process along with the requisite stage-specific sales tools and exit criteria. It can also include Qualification, Deal Review & Forecasting Guides.
- What to Say content includes messaging tools like Elevator Pitch, Discovery Talk Tracks, Positioning Guides, Objection Handling Responses & Prospecting Templates.



# 7. ANATOMY OF A GREAT SALES PROCESS PLAYBOOK

## Design Goal: Process + Conversation Excellence Enablement

Best-in-class sales playbooks provide step-by-step guidance on how to achieve sales process execution excellence AND sales conversation preparation and execution excellence.

### ENTERPRISE SALES PROCESS

	1 VALIDATE	2 DISCOVER	3 PRESENT	4 PROPOSE	5 NEGOTIATE
<b>Goal</b>	Validate deal is real, worth pursuing, and estimate and, if qualified, gained agreement for further exploration	Explore, expand & confirm pain/risk of current situation and use cases that lead to our unique capabilities	Prepare and conduct demo and presentation that addresses pain/risk and use cases identified in Discover stage and confirm value/differentiation	Co-develop business case with prospect & gain agreement on solution impact and verify that all constraints necessary to close the deal are identified & resolved	Negotiate high win-win agreement and align internal team to ensure optimal implementation/execution
<b>Success Criteria</b>	<ol style="list-style-type: none"> <li>1. Leads are systematically addressed within 48 hours</li> <li>2. Opportunities are fully qualified regarding need, fit, budget &amp; timeline</li> <li>3. We understand the buying process and competitive landscape</li> <li>4. Potential champion identified</li> <li>5. Strategic Partner Identified</li> </ol>	<ol style="list-style-type: none"> <li>1. We have an in-depth understanding of prospect's current state and use cases</li> <li>2. We have shed light on the end-state of reaction</li> <li>3. We have interviewed &amp; engaged key stakeholders to understand each of their business, technical, and personal wins</li> <li>4. Key stakeholders have agreed to participate in a technical discovery and see a demo</li> </ol>	<ol style="list-style-type: none"> <li>1. We have established our value and differentiation and have established capabilities as the solution criteria</li> <li>2. We have demonstrated gained agreement from business and technical buyer that we are the solution for their use cases</li> <li>3. Key stakeholders have validated our value differentiation, and are to move forward a step</li> </ol>	<ol style="list-style-type: none"> <li>1. Appropriate internal stakeholders are aligned</li> </ol>	<ol style="list-style-type: none"> <li>1. Negotiation strategy is defined &amp; executed</li> </ol>
<b>Tools</b>	<ul style="list-style-type: none"> <li>Research Checklist</li> <li>Elevator Pitch</li> <li>Qualification Guide</li> </ul>	<ul style="list-style-type: none"> <li>Corporate Pitch Deck</li> <li>Use Case Discovery Guide</li> </ul>	<ul style="list-style-type: none"> <li>Corporate Pitch Deck</li> <li>Demo Guide</li> <li>ROI/TCO Calculator</li> <li>Competitive Battlecard</li> </ul>		
	WHY BUY?	WHY NOW?	WHY YOU?		

### EXECUTIVE BUYER CONVERSATION GUIDE

TOPIC	QUESTIONS
Motivation & Perception	<ul style="list-style-type: none"> <li>• Before we get started, I'm curious, what prompted you to contact us at this particular time? (inbound only)</li> <li>• How did you hear/have you heard about Acme?</li> <li>• Were you referred by anyone? Do you know anyone that uses Acme? What did they tell you about us?</li> <li>• What's your understanding of what we do?</li> </ul>
	<ul style="list-style-type: none"> <li>• You probably know Acme because of our mobile credit card reader. When we launched in 2009, we revolutionized how, where and by whom payment could be accepted.</li> </ul>
	<p>At the POS, business owners have told us that they were frustrated by too complex and costly to effectively and efficiently manage their transactions. They told us they wanted a better, faster, more cost-effective way that they wanted one app to run their business.</p> <p>So we do, in order to help me understand how we might be able to be of you a few questions about your business?</p> <p>Business?</p> <p>2 months, what are the key metrics you are most trying to improve? Other things to increase things like average ticket size, number of visitors, number of conversion rate.</p> <p>What are most important?</p> <p>What's your biggest concern in terms of what is or might get in the way of?</p> <p>Is that right? About how many customers are you seeing per day? per day? Per location? What % is credit card?</p> <p>Discuss different aspects of your business.</p>

### QUALIFICATION CHECKLIST

What indicates this is a qualified opportunity worthy of pursuit?

Topic	Business Criteria	
1 MOTIVATION	There is a known compelling event or driver compelling them to make a decision	✓
2 BUYING PROCESS	We are early in the buying process	
3 PROJECT	They have a sanctioned project and assigned resources to evaluate and implement a solution	
4 FAMILIARITY	The prospect is familiar with Acme through a reference, Gartner report or past experience	
5 NEED	There is an identified need for at least one Acme solution	
6 BUDGET	Budget has been allocated or can be and we understand budget process, if none exists	
7 TIMING	The prospect can make a decision to move forward within 2-6 months or our fiscal year	
8 DECISION	We know the decision process, timeline, and criteria	
9 STAKEHOLDERS	We know the names and roles of key stakeholders including who has final signoff	
10 ACCESS	We have access to a coach and Financial Buyer	
<b>TOTAL SCORE</b>		

# 7. ANATOMY OF A GREAT SALES PROCESS PLAYBOOK

## Design Goal: Critical Conversation Enablement

Your playbook should provide frameworks and instruction on how to conduct the three most critical conversations in sales.

Sales  
CONVERSATION

Between  
Rep & Prospect  
throughout  
SALES PROCESS

Coaching  
CONVERSATION

Between  
Manager & Reps  
during  
DEAL REVIEW

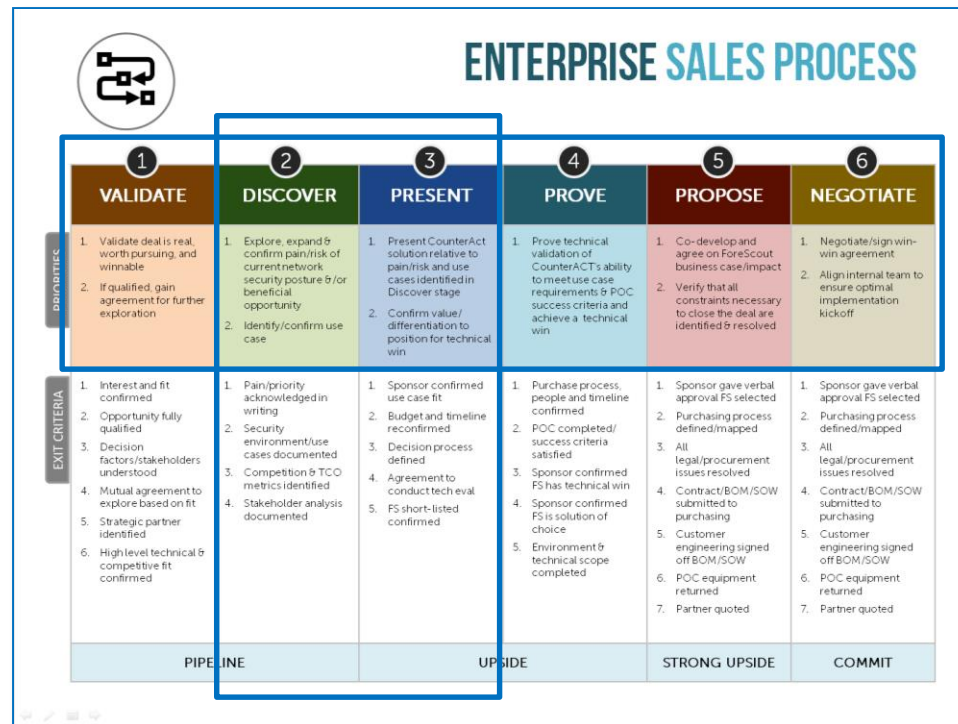
Forecast  
CONVERSATION

Between  
Manager & VP  
during  
FORECAST CALL

# 7. ANATOMY OF A GREAT SALES PROCESS PLAYBOOK

## Design Goal: Process & Methodology Enablement

A great playbook provides guidance on how to best carry out the left-to-right motion of your sales process as well as your in-depth pain discovery and value messaging methodology.



# 7. ANATOMY OF A GREAT SALES PROCESS PLAYBOOK

## Design Goal: Comprehensive, Concise & Contextual

A great playbook is comprehensive providing concise guidance and relevant tools contextualized to your sales process to enable reps and managers to effectively carry out their day-to-day responsibilities.

ALPHATECH PLAYBOOK TABLE OF CONTENTS		
SECTION	CONTENT OVERVIEW	PAGE
Playbook Purpose & Structure	An overview of how to use the playbook to build a pipeline of qualified opportunities	3
Targets & Ideal Prospect Profile	Alpha's Target Markets & Ideal Prospect's business & technology characteristics	6
Target Security Buyers	Description of Alpha target buyers & their profiles	8
Alpha Sales & SDR Process	An overview of the Alpha Sales Process with SDR-specific details & best practices	12
Qualification Checklist	A set of questions used to determine the degree to which an opportunity is qualified	21
Pipeline Development Metrics	The definition of expected pipeline development activities	22
MQL & TQL Definition	The definition of what constitutes a MQL & TQL	23
SDR Role & Responsibilities	A description of an SDR's role and key responsibilities	24
Alpha Elevator Pitch	A buyer-centric approach to explaining what Alpha does and create interest	26
Cold Call Model & Talk Track	A prospecting call model and tool to guide a cold call to a target contact	27
Prospecting Email Best Practices	A model to use for creating personalized emails that get prospects to respond	31
Discovery Questions & Best Practices	A set of questions used to expose, explore and expand prospect gaps and needs	32
Why Alpha	Description of Alpha differentiation	34
Objection Response Model & Guide	A model and guide for effectively addressing objections	35
Competitive Battlecard	A description of our top competitors' key limitations	37

8

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# ASSEMBLY OF A GREAT SALES PLAYBOOK PROGRAM



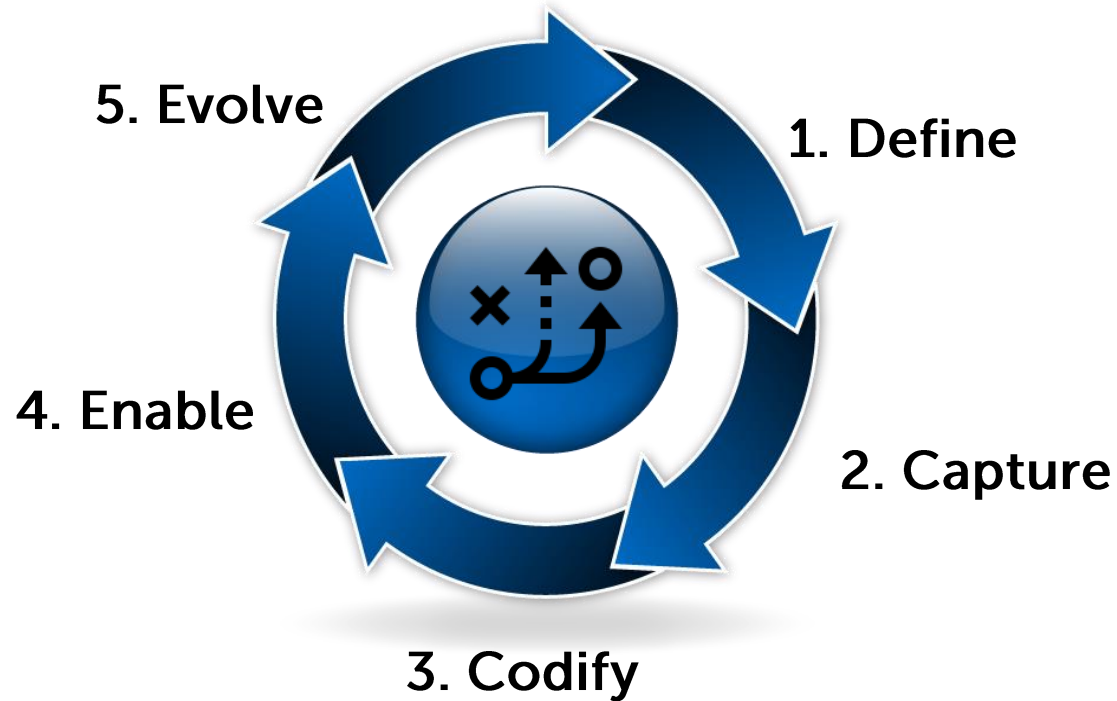


# 8. ASSEMBLY OF A GREAT SALES PLAYBOOK PROGRAM



## The Playbook Program Development & Deployment Process

Now that we have figured out the best way to structure a playbook and what to put in it, let's discuss the best way to develop and deploy it for optimal impact. What follows is a 5-step process to build a world-class sales process playbook program.



# 8. ASSEMBLY OF A GREAT SALES PLAYBOOK PROGRAM

1	2	3	4	5
DEFINE	CAPTURE	CODIFY	ENABLE	EVOLVE
<ol style="list-style-type: none"> <li>1. Team</li> <li>2. Target metrics</li> <li>3. Target competencies</li> <li>4. Templates <ul style="list-style-type: none"> <li>• Process</li> <li>• Stages</li> <li>• Messaging</li> <li>• Tools</li> </ul> </li> <li>5. Project plan &amp; timeline</li> </ol>	<ol style="list-style-type: none"> <li>1. Content collection, assessment &amp; categorization</li> <li>2. Top performer &amp; SME interviews <ul style="list-style-type: none"> <li>• Say?</li> <li>• Ask?</li> <li>• Do?</li> <li>• Use?</li> </ul> </li> <li>3. Customers or proxies <ul style="list-style-type: none"> <li>• Why us?</li> <li>• Process?</li> </ul> </li> </ol>	<ol style="list-style-type: none"> <li>1. Define/refine sales process</li> <li>2. Buyer profiles</li> <li>3. Discovery Guide <ul style="list-style-type: none"> <li>• Use case</li> <li>• Persona</li> </ul> </li> <li>4. Buyer journey stories</li> <li>5. Why Change/ Now / Us messaging</li> <li>6. Objections &amp; FAQ Guide</li> <li>7. Conversation framework / pitch deck</li> </ol>	<ol style="list-style-type: none"> <li>1. Confirm process &amp; playbook</li> <li>2. Edit then publish</li> <li>3. Develop and deliver process and playbook training</li> <li>4. Develop &amp; schedule reinforcement plan &amp; process</li> <li>5. Technology enable</li> </ol>	<ol style="list-style-type: none"> <li>1. Develop an iteration cadence &amp; process</li> <li>2. Iterate process and tools</li> <li>3. Specialize playbook by sales roles or market segments</li> <li>4. Measure &amp; test adoption</li> <li>5. Leverage content for Sales University</li> </ol>

# 8. ASSEMBLY OF A GREAT SALES PLAYBOOK PROGRAM



## Define

- Form a playbook project committee
- Determine what metrics you want to improve
- Determine what rep competencies you want to improve
- Schedule and publish playbook development phases and timeline

## Capture

- Collect, assess, and categorize content by sales process stage and whether the content is seller or buyer focused
- Interview top performing reps, sales engineers, and other relevant SME's to determine what they say, ask, do, and use at each stage of the sales process
- Assess recent win and loss factors to determine common success indicators and lessons learned
- Interview customers or customer success reps to identify the factors that led the customer to select you over the competition

# 8. ASSEMBLY OF A GREAT SALES PLAYBOOK PROGRAM



## Codify

- Define or refine your sales process
- Develop discovery conversation guides by use case or buyer persona
- Develop “customer buying journey” stories that illustrate how and why a customer decided to implement your solution and the impact you've had on their business
- Develop target audience and buyer profiles describing buyer role specific goals, challenges, metrics, and current state gaps and risks
- Develop use-case-centric discovery guides to help reps explore, expose, and expand the gaps and risks of the buyer's current state that point to your unique set of capabilities as the best approach to resolve these
- Develop a Positioning Guide that highlights how your capabilities are the optimal, fastest, and easiest approach to resolving the buyer’s critical issues
- Develop objection prevention and handling guides
- Develop competitive Battle Cards that describe key competitors’ strengths and weaknesses and how to set traps against them and how to defend against traps set by them

# 8. ASSEMBLY OF A GREAT SALES PLAYBOOK PROGRAM



## Confirm

- Review playbook structure, content, and tools with playbook committee
- Edit process, playbook, and tools as necessary

## Enable

- Publish playbook
- Develop and deliver a training workshop or series of workshops with learning activities focused on teaching stage-specific best practices
- Make playbook accessible via your CRM
- Develop a coaching plan and cadence to help sales leadership and management reinforce sales process and best practices

## Evolve

- Conduct a monthly, bi-monthly or quarterly sales playbook update workshop with sales leadership and top performers to iterate the sales process, best practices and tools, as necessary
- Specialize playbook by roles or markets

9

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# THE TECHNOLOGY-ENABLED SALES PLAYBOOK



# 9. THE TECHNOLOGY-ENABLED SALES PLAYBOOK

## CRM-Integrated Sales Playbook Benefits



Leverage  
top performer  
best practices



Enable consistent  
sales process  
execution



Provide  
deal-specific  
coaching



Improve  
pipeline visibility  
and  
forecast accuracy



Reinforce  
sales training  
and facilitate  
coaching



Standardize  
best questions,  
stories, talking  
points & objection  
responses



Give instant  
access to the  
right sales tool  
at the right time



Increase  
CRM adoption  
and  
productivity



Easily build  
multiple  
playbooks

# 9. THE TECHNOLOGY-ENABLED SALES PLAYBOOK



## Limitations of Document-Based Playbooks

The traditional approach to building a sales playbook is to use Word or PowerPoint or Google Docs to develop a hard copy playbook. The document can be printed or stored online.

Whether it's printed or stored online, document-based playbooks, inevitably, end up gathering real or virtual dust. There are obvious limitations with this approach.

Document-based playbooks:

- Become obsolete shortly after publication
- Are difficult to maintain and update
- Are expensive to print and reprint
- Make it cumbersome to build add-on playbooks
- Are not practical to use on a day-to-day basis
- Provide a poor user functional experience because difficult to navigate
- Provide a poor user aesthetic experience because text heavy



# 9. THE TECHNOLOGY-ENABLED SALES PLAYBOOK



## Technology-Enabled Sales Playbook Advantages

By 'technology-enabled sales playbook' we mean a sales process playbook application that is integrated into your CRM. Here are some advantages of a CRM-integrated sales process playbook app.

- **Enables Agile Playbook Development.** By leveraging the playbook authoring module and built-in playbook template, your time-to-playbook can drop from months to days.
- **Enables Iterative Playbook Development.** The secret to good writing is editing. The sooner you publish, the sooner you can iterate. A technology-enabled playbook enables playbooks to be continually improved and up-to-date.
- **Enables Multiple Playbook Development.** Having the ability to with just a few clicks clone and customize additional playbooks enables you to easily build multiple market-segment-specific playbooks.
- **Enables Crowdsourced Playbook Development.** Having the ability to update your playbook or playbooks in real time allows you to leverage user input and update your playbook to reflect the latest field-tested best practices.

# 9. THE TECHNOLOGY-ENABLED SALES PLAYBOOK



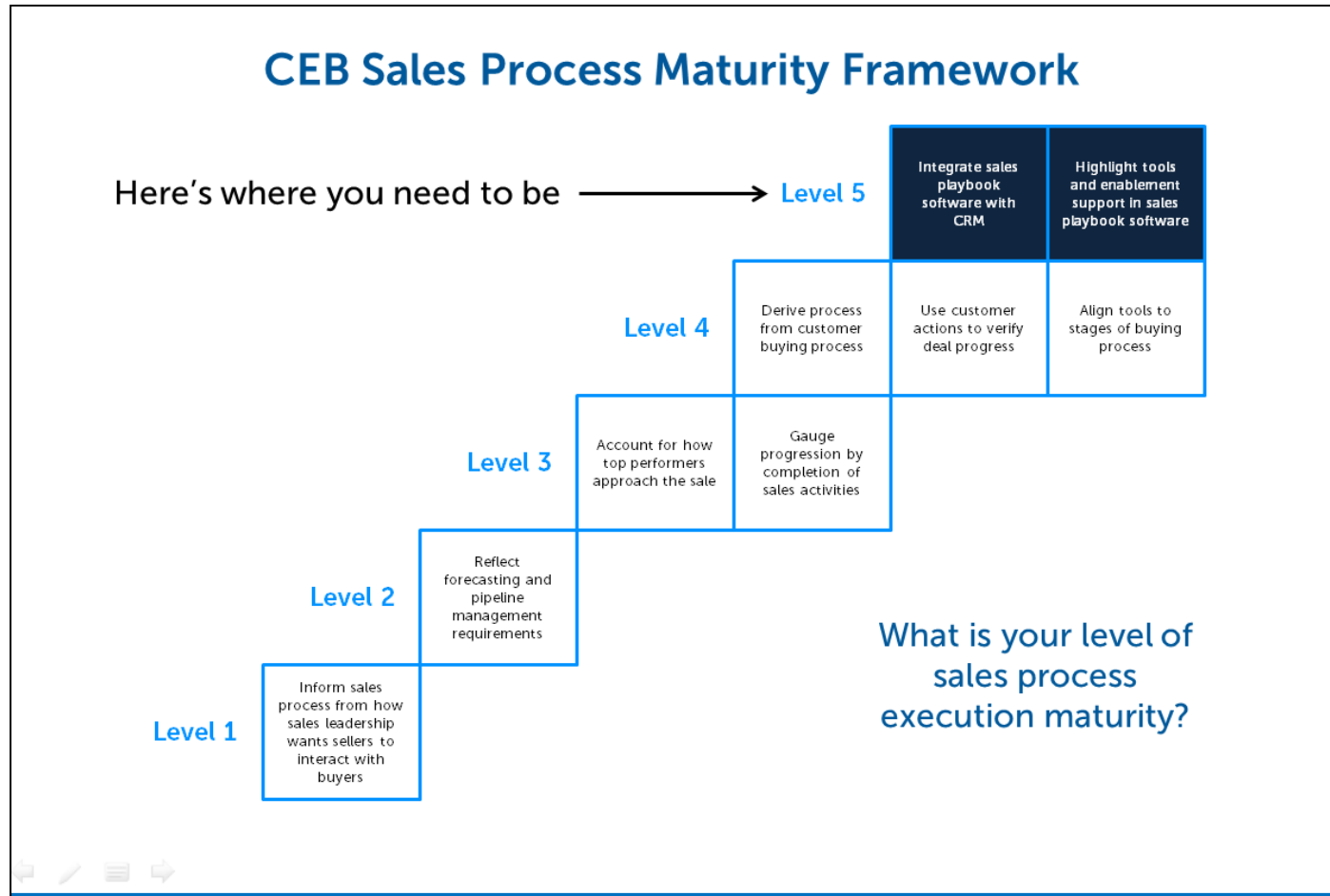
## CRM-Integrated Playbooks Drive Sales Process Execution

The common thrust in the Sales Enablement definitions is that the central role of Sales Enablement is to equip salespeople with the means (tools, training, technology) to apply best practices throughout the sales process, and for sales managers to systematically coach them to do so.

That's the purpose of a CRM-integrated sales process playbook.

Which is why the Corporate Executive Board (CEB) has declared that the highest level of Sales Process maturity requires you to have your sales playbook integrated into your CRM.

# 9. THE TECHNOLOGY-ENABLED SALES PLAYBOOK



SOURCE: CORPORATE EXECUTIVE BOARD

# 9. THE TECHNOLOGY-ENABLED SALES PLAYBOOK



## Sales Excellence Enablement. On-Demand.

Sales Excellence Enablement On-Demand means equipping SDRs, salespeople, and sales managers with the training, tools, and technology they need to consistently apply deal, conversation, and forecast management best practices at each stage of the sales process to assess and advance SPECIFIC leads and deals within your CRM

The emphasis is deal execution excellence.

Deal execution excellence results in higher win rates, better forecast accuracy, shorter sales cycles, larger average deal sizes, and decreased deal slippage.

More won deals leads to more reps hitting their numbers. More reps hitting their numbers leads to a higher likelihood of overall growth target achievement.

# 9. THE TECHNOLOGY-ENABLED SALES PLAYBOOK



## Technology-Enable Sales & Coaching Effectiveness

The ultimate benefit of a CRM-integrated sales process playbook is that it makes all of the best practices and sales tools referenced in your playbook easily accessible thereby significantly improving your sales strategy and sales process execution. Additional advantages of a CRM-integrated sales playbook include:

- **Makes Your Playbooks Actionable.** Enabling your reps to select and apply playbooks to specific leads and deals makes your playbooks actionable and increases their utility by an order of magnitude.
- **Enables Guided Selling.** A CRM-embedded sales process playbook will guide your salespeople to consistently apply best practices and tools at each stage of your sales process to specific leads and deals.
- **Enables Guided Coaching.** A CRM-embedded sales process playbook provides the ideal framework to guide your managers to help reps assess and advance deals.
- **Enables Guided Deal Forecasting.** By including a deal health assessment tool in the playbook that shows deal-specific stage and forecast category exit criteria progress, reps and managers can get on the same page about a deal's forecast status.

# 9. THE TECHNOLOGY-ENABLED SALES PLAYBOOK



## Sales Enablement Technology Maturity Model

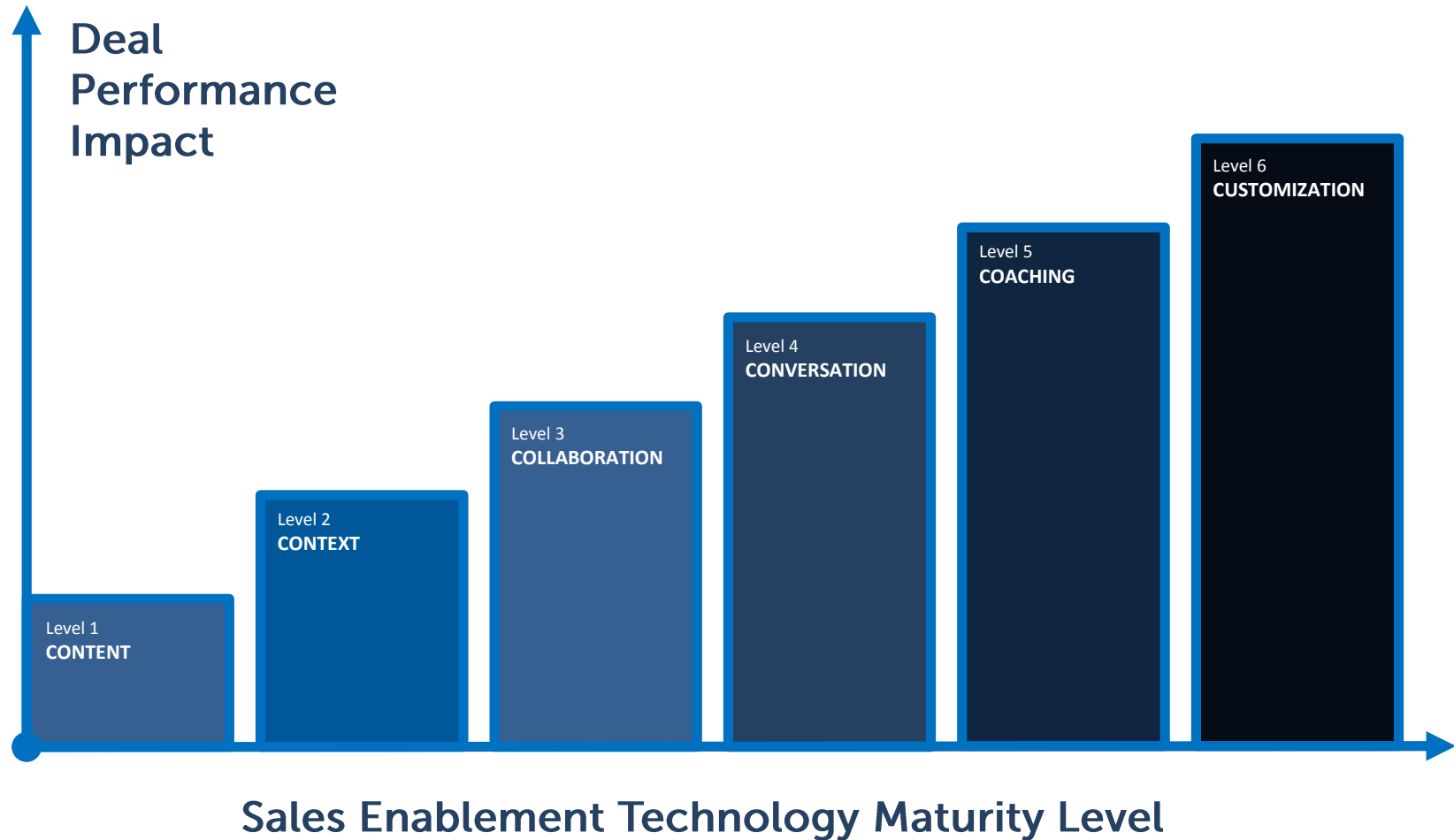
When considering an investment in a Sales Enablement application, the ultimate decision factor needs to be the extent to which the solution will help the sales organization win more often. More wins, especially of forecasted deals, means a higher likelihood of overall quota attainment and greater forecast accuracy

The SALES ENABLEMENT TECHNOLOGY MATURITY MODEL helps assess the potential impact on deal winnability performance of a given Sales Enablement application. Think of this as a requirements checklist for evaluating sales enablement technology solutions.

Level	Factor	Detail
1	CONTENT	Enables easy access to sales tool and training content
2	CONTEXT	Enables easy access to sales tool and training content in the context of your sales process
3	COLLABORATION	Enables rep, manager, and any other interested parties to collaborate on assessing risks and strategizing how to advance specific deals
4	CONVERSATION	Enables reps to consistently prepare and conduct high quality conversations at each stage in the sales process
5	COACHING	Enables managers to hone in on key deals and provide situational coaching to help reps advance and close these deals
6	CUSTOMIZATION	Enables customization of playbooks to drive consistent application of vertical-market or product-specific deal and conversation best practices

# 9. THE TECHNOLOGY-ENABLED SALES PLAYBOOK

## Sales Enablement Technology Maturity Model



# 9. THE TECHNOLOGY-ENABLED SALES PLAYBOOK



## Learning Enablement Platform

From a purely training perspective, it's useful to think of Sales Enablement technology in the context of learning enablement.

There are two critical technology components required to drive learning absorption, adoption, and application: *a learning management system and a CRM-integrated sales process playbook.*





# 9. THE TECHNOLOGY-ENABLED SALES PLAYBOOK

## Playbook Authoring Made Easy

The screenshot displays the Salesforce Playbook Enterprise interface. At the top, there's a navigation bar with 'Environment Hub', 'Home', 'Opportunities', 'Playbook Dashboard', and 'Pipeline Dashboard'. Below this, the 'Playbook ENTERPRISE' header is visible. The main content area is organized into five columns, each representing a stage of the sales process: 1. Initiate, 2. Discover, 3. Prove, 4. Propose, and 5. Negotiate. Each column has a '+ Add Play' button and a list of specific actions.

1. Initiate	2. Discover	3. Prove	4. Propose	5. Negotiate
<ul style="list-style-type: none"><li>+ Add Play</li><li>Prep initial call</li><li>Discuss sales enablement</li></ul>	<ul style="list-style-type: none"><li>+ Add Play</li><li>Discuss sales organization</li><li>Discuss decision process</li><li>Assess buyer readiness &amp; fit</li></ul>	<ul style="list-style-type: none"><li>+ Add Play</li><li>Prep win strategy</li><li>Conduct Playmaker demo</li><li>Assess buyer perception</li></ul>	<ul style="list-style-type: none"><li>+ Add Play</li><li>Prepare &amp; submit SOW</li><li>Discuss implementation</li><li>Assess risk &amp; commitment</li></ul>	<ul style="list-style-type: none"><li>+ Add Play</li><li>Manage contract process</li><li>Manage services hand-off</li></ul>

Easily create multiple segment-specific playbooks that guide reps and managers to consistently apply deal, conversation, and forecast management best practices at each stage of your sales process to initiate, assess, and advance SPECIFIC leads and opportunities

# 9. THE TECHNOLOGY-ENABLED SALES PLAYBOOK

## Deal-Specific Guided Selling

▼ Playmaker

1. Initiate 2. Discover 3. Prove 4. Propose 5. Negotiate Closed Won Closed Lost

Process Management Deal Management Call Management Sales Tools Sales Training

+ New Event + New Task + New Note + New Email

Save

DISCUSSION + Open All

Prepare initial call	
Discuss sales enablement	
Ambitions, obstacles, initiatives & priorities?	<p>Tip</p> <p>CRITICAL ISSUES: What's keeping Ron, Chris and David and you up at night relative to the sales organization? Big issue for Ron is forecast accuracy and SFDC hygiene. They acquired Wamdalla last year. Main issue for Inside AEs is building pipeline and becoming more effective at discovery. Want to improve cross-sell of product from acquisition.</p>
Current state sales enablement?	<p>Tip</p> <p>Sounds like he works closely with Scott Johnson from K2 on sales enablement initiatives. Scott is former VP Sales Ops at Acme Software. Have a documented sales process, but adoption is an issue. Use MEDDIC.</p>
Sales playbook status?	<p>Tip</p> <p>FIND OUT: Have they updated the playbook since we trained them a couple of years ago? They have not, despite significant change, including new acquisition.</p>
Sales enablement technology stack?	<p>Tip</p> <p>Use MT for LMS, DocuSign, and Apttus</p>
Most important sales enablement goals?	<p>Tip</p> <p>Leverage top performer best practices Enable consistent sales process execution Provide deal-specific coaching Improve pipeline visibility and forecast accuracy Reinforce sales training &amp; facilitate coaching Standardize best questions, stories, talking points &amp; objection handling Access right tools right time Improve CRM adoption</p>

Interactive guided selling enables reps to give and get the most essential information in the flow of the conversation for specific leads and deals

# 9. THE TECHNOLOGY-ENABLED SALES PLAYBOOK

## Deal-Specific Guided Coaching

▼ Playmaker

✓ ✓ 3. Prove 4. Propose 5. Negotiate Closed Won Closed Lost

Process Management Deal Management Call Management Sales Tools Sales Training

DEAL PROGRESS Save

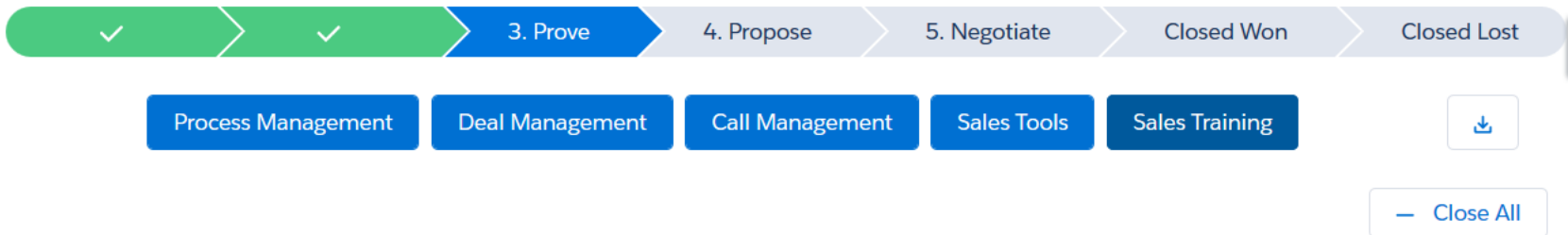
Forecast Category	Stage	Deal Progress	Status
Pipeline	1. Initiate	They sell into multiple vertical markets	✓
	2. Discover	Improving sales process execution is a priority	✓
		Sales manager enablement is a priority	✓
		Prospect will make decision within 3-6 months or calendar year	✓
		There is a compelling event/driver to change current state	✓
		We know decision process, timeline, and who has final sign-off	✓
		Prospect has or can get budget	✓

Consistent, thorough, and actionable deal review and planning sessions every single time

# 9. THE TECHNOLOGY-ENABLED SALES PLAYBOOK

## Deal-Specific Guided Learning

▼ Playmaker



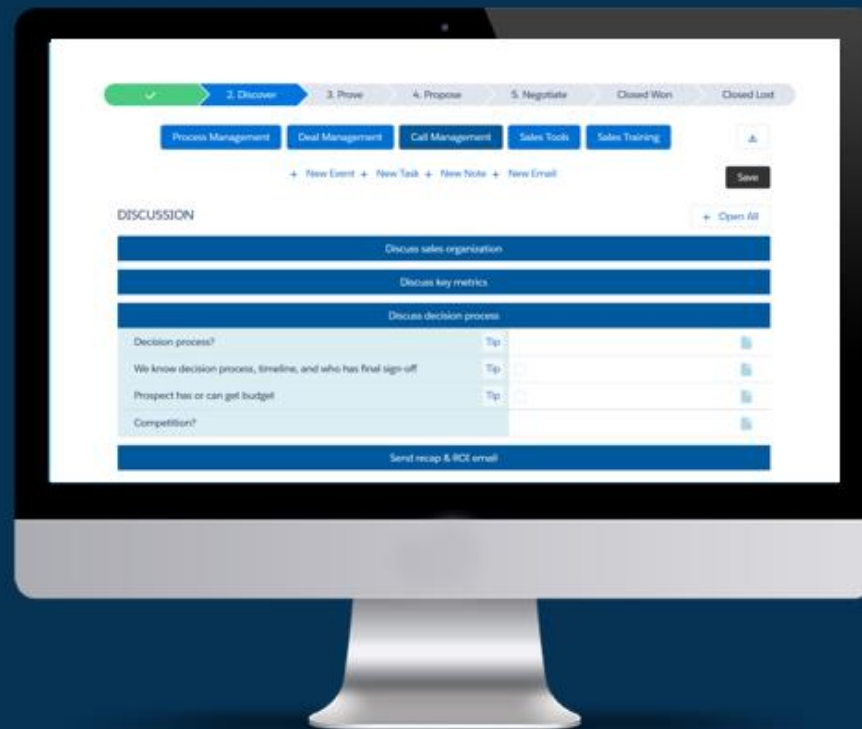
Success-Stories	
PB IMPACT STORY ROLE PLAY RECORDING	Recording of top rep walking through a customer success story
Product	
PM DEMO RECORDING	Recording of top rep giving PM demo

Instant access to just the right tools and training at the most critical point of need

# SALES EXCELLENCE ENABLEMENT. ON-DEMAND.

## SANDLER PLAYMAKER

Native Salesforce.com sales process playbook software



Playboox is a Sales Enablement consultancy specialized in developing and delivering customized sales process playbooks and sales training powered by technology.

# ABOUT THE AUTHOR



## Daniel Zamudio

- Founder & CEO, Playboox
- Thought leader on the convergence of process and technology to drive sales productivity and effectiveness
- Sales leadership background: Symantec, Gartner, Xerox
- UC Berkeley Haas School of Business MBA
- Management philosophy: Have a process in place and fun in the process
- Playboox is the developer of Sandler Playmaker