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Best Practices in Sales Tool Development

by Robbie Kellman Baxter

Too often, sales tools are an afterthought. The product has been developed, the sales team is out selling it, and the sales team says they need slides, demos or case studies to close business. These requests are thrown over to marketing, without much information about HOW these tools will be used. As a result, tools are developed that are accurate and attractive, but don't necessarily help move the sales process forward. With a little planning, and some outreach to different parts of the organization, marketing can develop sales tools that really make an impact.

- 1) Understand sales process. How many times does the sales team contact the prospect and what needs to happen at each step? How long does each contact last, and are they live, online, or via phone? Who participates? What are some of the typical meeting objectives that sales people need to be prepared for? What can go wrong? What are the best practices that the top sales people practice? What are the pitfalls that can bog down less seasoned sales people?
- 2) Define problems with current selling process. Participate in a few sales calls and interview some of the sales team (both the stars and the neophytes) to understand how a typical sales call plays out.
 - a) Where does the sales person feel stuck or defensive?
 - i) Objections from prospects
 - ii) Materials required to support conversations
 - b) What key points does management feel are being missed by sales?
- 3) Determine requirements before beginning development. Just as with a new product, it's important to understand what these Sales Tools need to accomplish before beginning to implement. Spend a little time up front thinking through what you want to convey, what action you want the prospect to take, and what problems you are helping to solve. If you work from the needs of the prospect and the sales person, instead of starting with all the features of the product, you will end up with a more focused and effective piece.
- 4) Keep your customer in mind as you build the tools. Too many Sales Tools are designed by technical folks, or by the people who built the product. While these people know everything about what the product can do, they may not be thinking of what the customer needs. It's important to step into the shoes of the sales person, and more importantly, the customer, to understand what would make a successful meeting for each of them.
- 5) Develop materials that are simple, but flexible. A big pitfall of many sales tools is their monolithic approach. While you want to give your sales team a clear set of messages and make sure they understand how to deliver your materials easily, you also want to allow them to be responsive to the prospects needs.

Robbie Kellman Baxter is the founder of Peninsula Strategies, a strategy consulting firm focused on helping companies accelerate growth through new markets and product offerings. Corporate clients have included industry leaders Netflix, Sun Microsystems and Yahoo!, as well as fast-growing private companies such as Market-Tools (makers of Zoomerang) and PayCycle. She has spoken before groups including alumni associations of Stanford and Wharton, as well as several regional professional association. Frequently quoted in publications ranging from the New York Times to Inc Magazine and the eCommerce Times, Robbie earned her MBA from Stanford University and her AB from Harvard College. You can reach her at www.peninsulastrategies.com or 650-322-5655.

- a) Chunk information by topic or, better yet, use case. Each chunk should be less than 10 minutes.
 - b) Have clear bullet points that should be made with each slide,
 - c) Leave the slide general enough to allow the Sales Person to customize the message.
 - d) Wherever possible in the slides, demos and notes, indicate places for customization—for example:
 - i) an opening slide that encourages prospects to describe their current workflow challenges,
 - ii) a slide that allows the participants to set the agenda for the meeting in real time
- 6) Engage the audience quickly and get them talking. The more the sales team knows about the prospect, the better able they are to customize the presentation and more likely they are to connect.
- 7) Understand usage of materials. Just because the sales tool is designed to be presented on the Sales person's computer, doesn't mean that the sales tool will not be shared.
- a) Powerpoint Decks. Consider what will happen if the document is sent electronically (are there notes embedded? Are there custom fonts? How do the builds look in their static form?). How does the deck look when it is printed?
 - b) Demo. Can the demo be accessed from a non-company computer? What requirements are there? What happens if the internet connection isn't strong? What could go wrong in the live environment and how should the sales person handle it?
- 8) Training: Make it easy. Are all Sales Tools and Sales Training Materials located in the same place? When a new Sales Person joins the company, is it easy for him to know what's available and what he needs to do to get up to speed? Is the information being shared in the most efficient way? Generally, a combination of written materials, audio and video works best. It's always good to have written notes, because they are generally the fastest way to convey information, and enable easy review, in case something is forgotten.

In summary, the most important thing to think about in developing Sales Tools is the purpose it needs to fulfill in the selling process. Without careful attention to how it will be used and to what end, you risk spending a lot of time and money on materials that won't be used properly, or worse yet, won't be used at all.