
Unlocking Exponential Growth: Crafting the Ultimate Sales Playbook

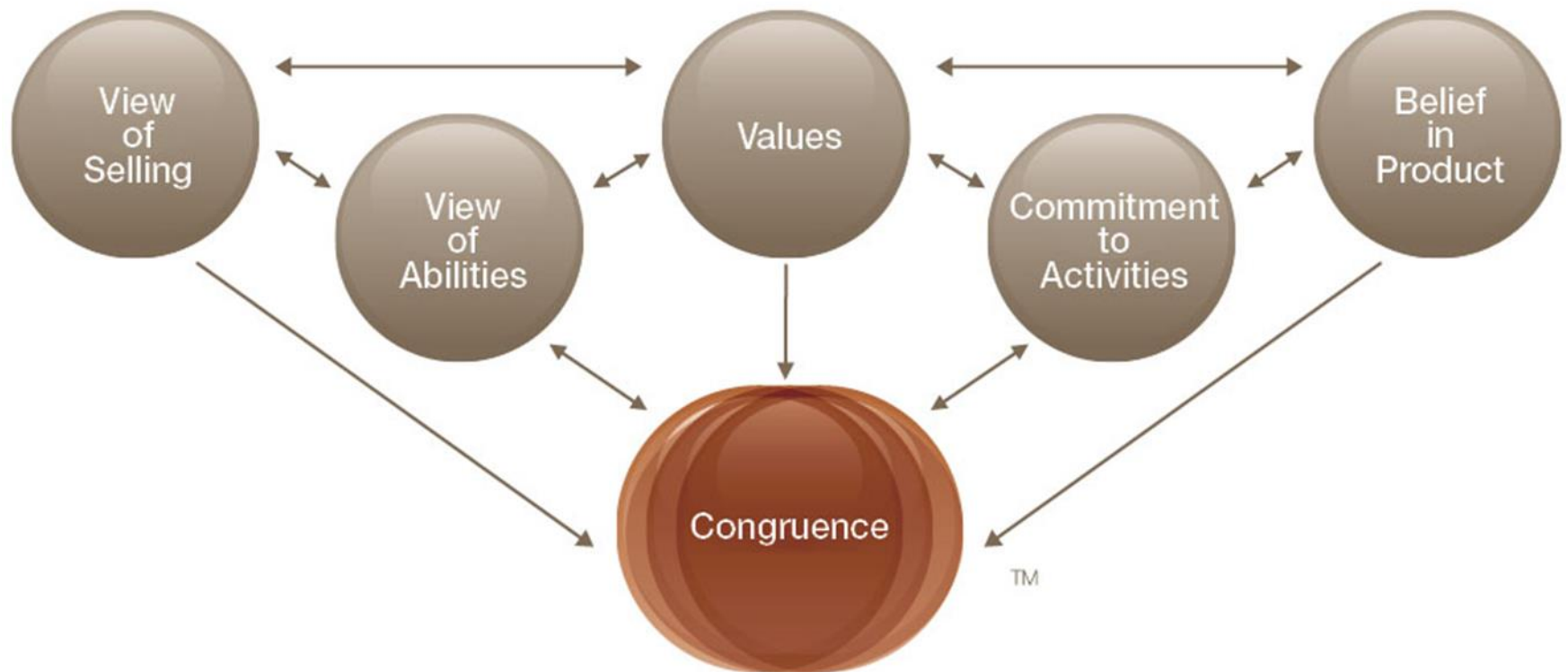
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Karl Berger, President Fractal Sales Solutions



- Statistics and engineering degrees
- Early career in manufacturing organizations (Ops, SC, etc.)
- Led local, national and international sales teams focused on manufacturing, product and technology
- Led Regional and international sales teams
- Managed \$2M to \$2B in quota
- Started Fractal Sales in 2016 to bring Sales advisory to SME owners
- Company Mission
 - Businesses need more than good ideas
 - They need help in implementing, executing and delivering results

Start With an Honest Assessment of Your Sales Mindset



A Clear Playbook/Process Helps Address Dissonance?

Sales Definition

Helping customers identify and solve their problems

Sales is something you do with someone, not to them

Sales Playbook is How A Business Leader Defines How We Sell!

- Who are your customers?
- What is the value to the customer?
- What problems do you solve?
- What is your competitive position?
- Why do they buy from us?
- What is a healthy pipeline?
- What is my lead gen plan/goal?

By defining how we sell and measuring progress we can instill accountability

Why a Sales Playbook? Example

Playbook	Before	After
<ul style="list-style-type: none"> • Value? • Pain? • Who? • Competition? 	<ul style="list-style-type: none"> • Safety Shoes • Shoe Cost • HR, Purchasing • Low-Cost Shoes 	<ul style="list-style-type: none"> • Safety & Compliance • Mgmt Time, Lost Hours • Mfg / Quality • Perform In-House

RESULT: 21% Margin% Increase, and 29% Sales Increase

Sales Opportunities: Sales Strategy (Dumpster Rental Example)

Our Guiding Sales Principles and our Strategic Offerings to the markets we serve	
Guiding Sales Principles	<p>We <u>prefer</u> clients who:</p> <ul style="list-style-type: none"> • Need dumpster and waste removal for ongoing/recurring needs • Customer who values full service from order placement, drop-off, exchange and dumping and can benefit from our technology stack • Not looking for the cheapest price • Are a referral from current customers • Have ongoing needs throughout the year(s) • Pay with a credit card on file
Buyer	<p>We <u>provide</u> solutions for:</p> <ul style="list-style-type: none"> • Contractors (homebuilders, multi-site) • Construction, Office, Manufacturing, Industrial • Property managers

Sales Opportunities: Sales Story (SaaS Example)

Power Statement:	We let lenders know when someone in their database has INTENT!!!.
Needs Addressed:	<p>Mortgage Lending Leaders Look to Us When They:</p> <ul style="list-style-type: none"> • Have difficulty growing the pipeline and are not leveraging their relationship database • Need more, quality leads to lower their cost of customer acquisition • Need to give their Customer Relationship Management system a brain to allow their loan officers to be smarter and better service their customers and prospects
Product/ Services:	<ul style="list-style-type: none"> • Borrower Intelligence platform that provides prescriptive analytics in the form of alerts. <ul style="list-style-type: none"> • Someone’s credit gets better, shopping for a mortgage, listing their home, equity in home, benefit from a better rate or has a life event (Marriage, Has kids, etc.) • We provide timely, effective compliance • We assure that “No borrower is left behind”
Differentiators:	<ul style="list-style-type: none"> • Broad and Diverse Data Services for timelier buyer need identification • Customized suite of products to provide actionable alerts • Better communication with a meaningful contact strategy and tracking • Provide a higher rate of return on our customer’s database asset, with intelligence

Competitive Analysis (Manufacturing Example)

Competitor	Why Us vs. Them?
Large International	We are smaller and more agile to design changes
West Coast Firm	We are local and can deliver in 72 hours
Local Mom & Pop	Well funded with ability to grow with you
Keep In-House	Better utilization of resources, Better ROI

Find the Commonality to Define Your Value Statement

Sales Opportunities: Buyer Personas – (Prop Mgmt Ex)



Supervisor Steve
Maintenance
Supervisor

Goals

- To maintain property in both appearance and structure.
- Run property like well oiled machine and be in the loop on all vendors and work performed.
- Find vendors that make their lives easier not more difficult

Objections To Purchase:

- Pricing is first objection.
- Loyalty to people they have used for years.
- Longer lead times.

Compelling Stories

- **Pain:** Communication and wasted trips/time. The unprofessional appearance of vendors they send into resident homes.
- **Solution:** : We are the most responsive and professional company in the Area. We pride ourselves in same-day next-day service.
- **Remarkable:** Our fully-stocked trucks allow us to handle many job types on the first visit. We give them productive time back in their day.

Companies with 100-500 employees average 7 people involved in a purchase decision.

Sales Calculus: What Pipeline is Required to Achieve Plan?

Business Development Strategy:

Every sale is process driven. Once the process and system has been developed with supporting data, it will become easier to share and teach new team members. The Business Development leader must know the numbers related to their pipeline equation to drive their own performance and achieve targeted new revenue

Sales Math:

- Marketing Leads
- Sales Leads (80% Conversion)
- Sales Meetings (33% Conversion)
- Quotes (60%)
- Win (40%)
- Target New Revenue (Avg Deal:\$3K)

Required

1,578 Mktg Leads
1,262 Sales Leads
416 Meetings
250 Deals
100 Deals
\$300,000

Sales Process

Fractal Sales Standard Sales Cycle



Our Sales Process



Stage 2 – Demo Schedule (SaaS Example)

	Win Percentage: %
How this phase is entered	<ul style="list-style-type: none"> • Marketing Campaigns • Individual EM Campaign • Referrals • SDR Effort
Responsibilities during this phase	<ul style="list-style-type: none"> • Call ASAP • Qualify Account • Rapport development • Confirm or schedule forward the Demo
Clarifying Needs Questions	<p>Required</p> <ul style="list-style-type: none"> • What was your loan volume last year? This year Goal? • How many loan officers (@Site, Corp wide) • Which CRM do you Use? • How many records do you have in your database?
Update to CRM	<ul style="list-style-type: none"> • Continue to Fill Out Qualification Data in ACCOUNT and OPP in CRM
Needed to move forward to next phase	<ul style="list-style-type: none"> • Hold The Demo, Gather Data <ul style="list-style-type: none"> • Role and Decisionmaker • Confirm Production Goal (Current State and Future State) • Confirm # Records (So can provide Pricing and Projected ROI) • Confirm CRM

Top Short Term Impacts to Profits and Growth

- **Market Dominating Position:** A distinctive advantage around your customer's hot buttons!
- **Compelling Offer:** Incentive or Information offers impact sales by 43%
- **Increase Pricing:** Times have been difficult. People understand that and may be receptive to a reasonable price increase.
- **Upsell & Cross-sell:** Customers are more receptive once they are in a buying mindset.
- **Down-sell:** What is your response if there is insufficient budget? Is there a cost/value down-sell?

Top Short Term Impacts to Profits and Growth

- **Additional Products & Services:** Our job is to help our customers solve problems. Get outside the box.
- **Alliances:** Wedding planners partner with florists. On average companies will see 25% of their revenue from alliances.
- **Drip Campaign:** 80% of sales occur after 5 to 12 contacts. A mindful, customer-focused, value-driven drip campaign can make this painless.
- **Digital Marketing:** Enable customers to reach you by showing them how to get what they want.

Wrap Up

- Take ownership of your strategy, tactics and “how you sell”
- Start with assessing your sales mindset and the sales mindset of everyone who is involved with customers
- Be prepared by understanding your competitive position
- Do your sales math and track how you are trending
- Don’t get bogged down in the format or complexities of the sales playbook, but consider each step in the playbook
- Wash, Rinse Repeat! Implement something, monitor and improve!

Questions?