Account Executive Playbook
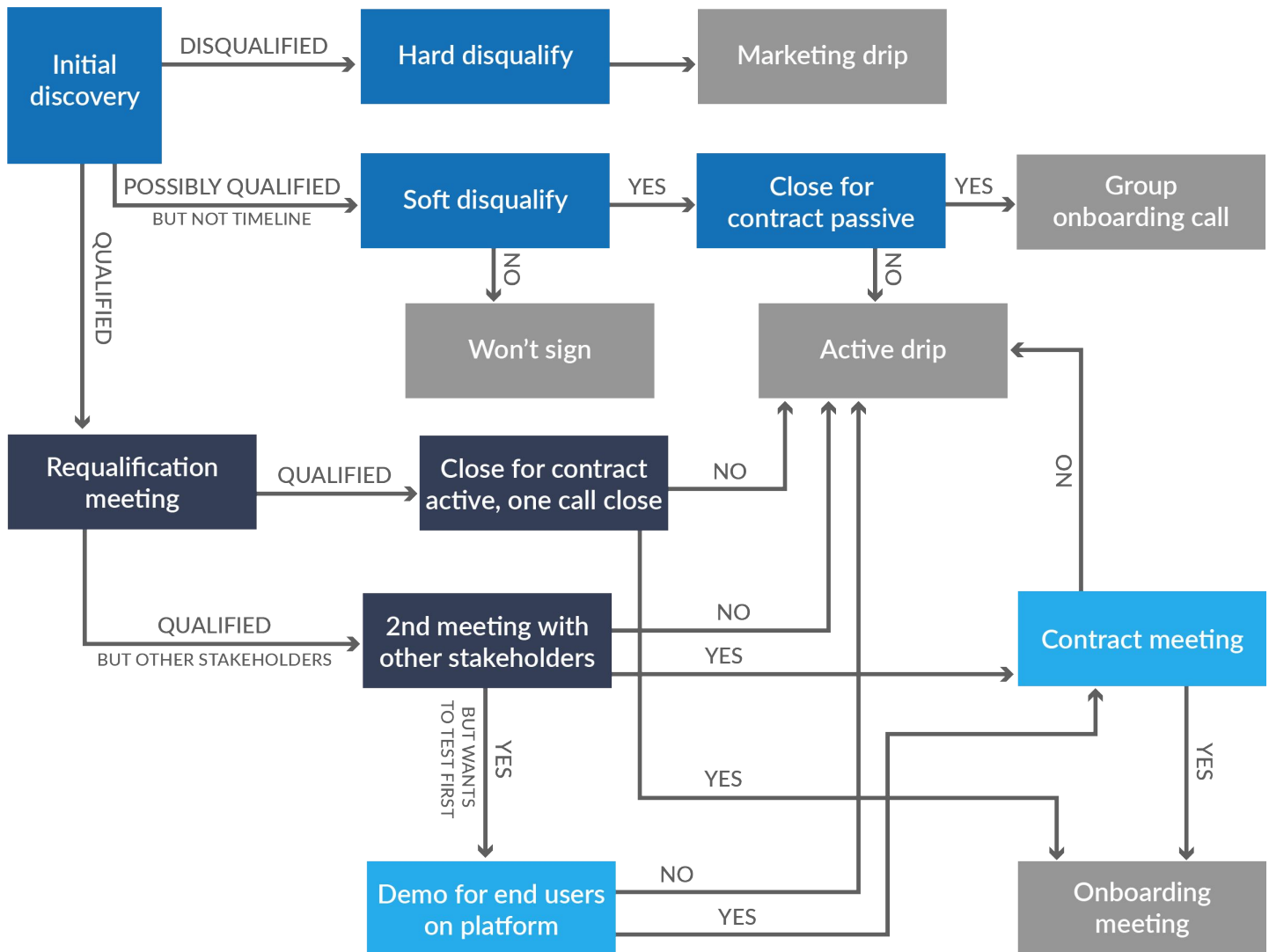
SALES PLAYBOOK FOR [COMPANY NAME]

Contents

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SALES PROCESS

Sales process overview

Initial discovery	DISQUALIFIED →	Hard disqualify	→	Marketing drip

Initial discovery
— DISQUALIFIED → **Hard disqualify** → **Marketing drip**
— POSSIBLY QUALIFIED BUT NOT TIMELINE → **Soft disqualify**
— QUALIFIED ↓ **Requalification meeting**

Soft disqualify
— YES → **Close for contract passive**
— NO ↓ **Won't sign**

Close for contract passive
— YES → **Group onboarding call**
— NO ↓ **Active drip**

Requalification meeting
— QUALIFIED → **Close for contract active, one call close**
— QUALIFIED BUT OTHER STAKEHOLDERS → **2nd meeting with other stakeholders**

Close for contract active, one call close
— NO → **Active drip**
— YES → **Contract meeting**

2nd meeting with other stakeholders
— NO → **Active drip**
— YES → **Contract meeting**
— YES BUT WANTS TO TEST FIRST ↓ **Demo for end users on platform**

Demo for end users on platform
— NO → **Active drip**
— YES → **Contract meeting**

Contract meeting
— NO → **Active drip**
— YES → **Onboarding meeting**

KEY:

- ■ Sales development representative (SDR)
- ■ Account executive - all sales
- ■ Account executive - sales for larger deals

Key terms

Sales development representative (SDR)

This is an "outbound" sales rep solely focused on researching, contacting and qualifying new sales leads. They neither close deals nor qualify inbound website leads.

Market response rep (MRR)

An inside salesperson who only qualifies leads coming in from a website.

Account executive (AE)

A salesperson responsible for closing deals, then passing them immediately off to the account manager. This person gets the contract signed, sets up the account, and may help to identify the first project.

Account manager (AM)

A quota-carrying salesperson responsible for nurturing and growing existing client accounts.

Customer success (CS)

This person ensures that all clients can utilize the platform correctly and helps with the day to day management of users. Unlike the AM who focuses on the business relationship, the Customer Success professional works to ensure that adoption of the platform is high and that everyone is trained on the product.
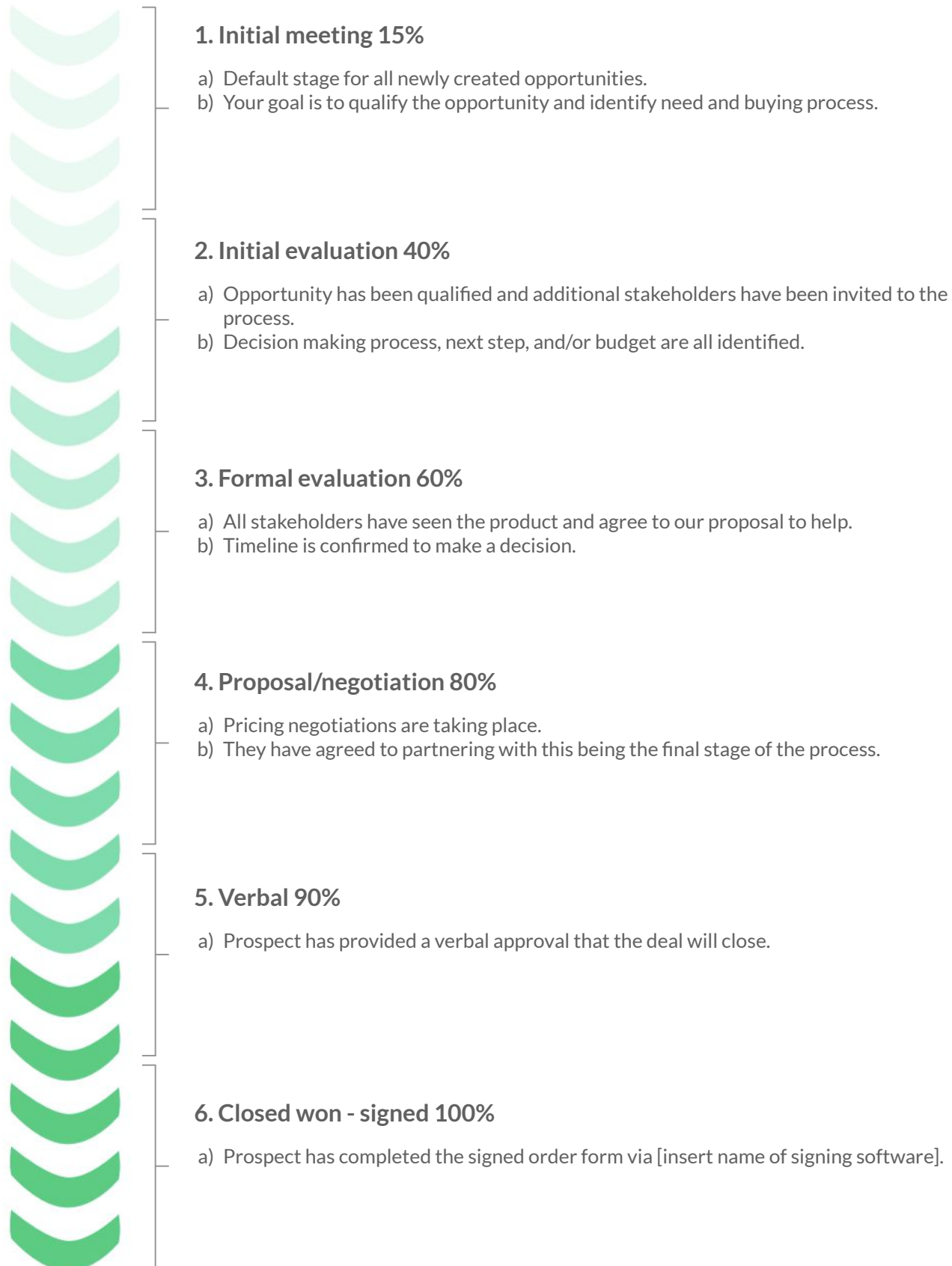
Sales qualified lead (SQL)

The AE has requalified that the opportunity and verified a clear business need or objective that aligns to our solution, timeline confirmed - next three months, and the authority/buying process.

Marketing qualified lead (MQL)

A company reaches a certain threshold to where a sales development should engage with this lead. This is a mix of demographic information and behavioral information, including the following:
  - Title:
  - Firm size:
  - Company email address (not personal email address):
  - Lead score:
  - Interaction points (reply, forward, visit the website, download content; all proactive touchpoints equal 1 point):

Opportunity stage & gates

1. Initial meeting 15%

    a) Default stage for all newly created opportunities.
    b) Your goal is to qualify the opportunity and identify need and buying process.

2. Initial evaluation 40%

    a) Opportunity has been qualified and additional stakeholders have been invited to the process.
    b) Decision making process, next step, and/or budget are all identified.

3. Formal evaluation 60%

    a) All stakeholders have seen the product and agree to our proposal to help.
    b) Timeline is confirmed to make a decision.

4. Proposal/negotiation 80%

    a) Pricing negotiations are taking place.
    b) They have agreed to partnering with this being the final stage of the process.

5. Verbal 90%

    a) Prospect has provided a verbal approval that the deal will close.

6. Closed won - signed 100%

    a) Prospect has completed the signed order form via [insert name of signing software].

Best practices

Lead stage

STAGES:
- New lead
- Contacted
- Connected
- Engaged: appointment set
- Pre-qualified: waiting for sales to accept the lead, if there are SDRs.

FIELDS TO BE ADDED:
- 3 fields for need/pains
- Budget confirmed
- Timeline: picklist of under a month, three months, six months; timeline to solve for the issue.
- Buying process: text field
- Decision maker: check box

These are required to flip the SQL and add it to the pipeline.

Account planning

Account fields in CRM.

COMPANY INFORMATION:
Mapped over from lead information.
- Firm size (number of employees):
- Firm type: ex: attorney, financial advisor, insurance agent, other.
- AUM size (optional):
- Number of clients:
- Technology used:
- Additional information:

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WORLDVIEW ALIGNMENT & PROCESS AGREEMENT

Worldview alignment

Common problems

Innovation in real estate tech has changed dramatically over the last 5-10-15 years. Zillow, Trulia, and tons of other sites, have reinvented the way that consumers search for real estate listings -- consumers now have all of these tech tools to search for tech tools and make sense of their apartment hunt.

However, this innovation has been mostly for the consumer side -- the commercial side is just catching up. The way to market our properties effectively has changed drastically, and gotten much more complex and confusing.

The big trend

The big trend in 20XX-20XX: The volume of rentals is increasing. However, attraction and retention of top renters will become more difficult as inventory/options increase. Because the best renters and long term renters will have more options than ever due to new technology, speed and accuracy of information has become necessary and expected.

All of these top renters are using multiple tools to make sense of their apartment hunt, and because of these advanced tools, all of them have high expectations on level and quality of service.

Landlords will need to step up to impress the top renters. Most landlords and brokers are still 20, 30 years behind or more when it comes to the technology they have adapted. Their listings are inaccurate and updated too slowly, and it takes valuable time to keep up. They have many systems today internally and also need to disseminate their own listings, and because the number of people choosing to rent is expected to increase, the sources to send listings to has been and will continue to increase at a high rate. Time is limited so it will be critical to consolidate our systems to win.
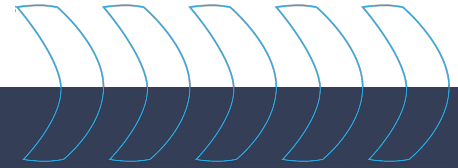
Key capabilities

You have to have all of your property information and marketing efforts centralized and up to date to meet current and future demands. Time will become a very precious commodity because you have to be on top of all of these sites.

You have to move from the whiteboard and fax to the iPad to ensure accuracy and speed of information to meet top renters' demands.

You need a partner who helps you to stay on top of these trends so you don't have to worry about the next site you need to be on or how to keep up with rental demands.

Process agreement

Example

Thank you [Client Name]. So based on our conversation today, our typical next step would be a more in-depth walk through of the platform as well as what we have done for [insert industry similar] similar to you. We will touch upon the key needs of your firm from what we discussed today and then put together the best partnership plan after synthesizing our notes from today and then.

It looks like we need to loop in [Decision Maker's Name (or if you don't know, ask them who else will be involved in the evaluation process)], so why don't we set up a brief conversation next week for a quick high-level so they are in the loop, and at the same time we can walk the team that will use [Company] through the high level and how we typically partner. If everything goes well on those conversations, we should be able to finalize pricing and discuss next steps. Does that work for you? Obviously you don't have their calendar in front of you so let's put down a placeholder for [Decision maker] and the more thorough demo and then we can circle to confirm. How does [suggested date and time] look?

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EMAILS, COLD CALLS,
& SOCIAL HANDLING

LinkedIn handling

LinkedIn plays an integral role in the engagement and nurturing of prospective clients and can be used to enhance your online business presence - allowing us to adopt a more personalized, targeted approach to the way we sell at **[Company]**.

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi.

Filler text title goes here

Send a connection request and thank you when accepted.

Endorse lead, like posts, share their content, and comment on their posts.

Send a personalized message and share through **[Company]** and content of value.

Never try to sell.

Examples of compelling events on persona or company's LinkedIn page

- Lorem ipsum
- Lorem ipsum dolor s
- Add your examples here.
- Make sure to turn the text back to white after creating the link.

Examples of applicable content from [Company]:

Awareness:
- Link out to your examples here
- Link out to your emaples here
- Make sure to turn the text back to white after creating the link.

Consideration:
- Link out to your examples here
- Link out to your emaples here
- Make sure to turn the text back to white after creating the link.

Decision:
- Link out to your examples here
- Link out to your emaples here
- Make sure to turn the text back to white after creating the link.

LinkedIn messaging examples

Use Linkedin to build rapport and nurture your prospects in a natural and approachable manner, without coming across as salesy. Relate to their LinkedIn activity and any compelling events in their company or industry before sharing any content of value. Your approach should be split into stages.

Below is an example of how you can structure and personalize your messaging through LinkedIn:

Step One: Using Compelling Events to Start Meaningful Conversations

[Name] - I saw that you recently [Compelling Event]!

Here's some creative ways to [relevant content to target audience]. Thought you'd enjoy.

[insert link url here]

Step Two: Building Rapport

Thoughts on the article?

In this whitepaper we uncover the surprising link between [relevant topic A] and [relevant topic B].

[insert link url here]

How much would you say your current onboarding is impacting retention at [Company]?

Step Three: Relate to Pain Points

We've worked with [similar company industry and results]. What time is best for you to chat on a quick call to discuss best practices for [relevant solution company offers]?

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FAQs & OBJECTION HANDLING

HOW TO HANDLE

Objections & closings

Objection handling

Outlining common responses that can address typical objections that may arise on a phone call.

Why Enboarder?

Enboarder is experience-driven. Today, other onboarding solutions are checklist/automation focused, or require logins/apps and barrier to entry for end users to actually engage with the technology. When are you available this week and I'll show you how

We don't have the budget for Enboarder.

I understand that budget may be tight but if I were to tell you that by using the Enboarder platform you could increase new hire retention by #%, wouldn't you be interested in finding out a little more before evaluating whether or not Enboarder is right for you?

I don't know how I would use the product.

Our 140+ customers use Enboarder for an enhanced end to end onboarding experience. Our user-friendly platform is experience driven so you don't need to be a tech whiz to get started and you can use the default workflow within the platform to help create more bespoke workflows tailored to your new hire needs.

What's the best time this week for us to jump on a quick screen sharing session and I will show you how just you can use the product as well as the value it can bring to your team?

I don't want to add another tool to our tech stack.

We are are not just another extension or add on product. Instead we are an end-to-end onboarding platform, used by over 140 companies worldwide. We change the way you onboard. Making new hires feel valued accepted and welcomed to your organization.

Our data is sensitive.

We value your data and security for SSO and Sequence password protection is built to protect confidential sequences/info from being accessed, although we do recommended that for a better user experience, it is only used when needed.

I don't have time right now, send me an email.

I would be more than happy to send you some information about our platform!
If you can't talk now, why don't we schedule some time when you are free to speak further about this?

Our onboarding process is fine the way it is.

That's great to hear. If you don't mind me asking, what tools do you use to keep your onboarding workflow running efficiently? ...I was hoping to show you how we can streamline your onboarding experiences to increase engagement. When is best for you to jump on a quick call and see our user-friendly interface in action?

We do everything internally.

There are a lot of companies we work with who had been using their own onboarding workflow but once they used our experience-driven platform, they found that they were saving time and resources but most importantly they were enhancing and maintaining company onboarding and wow-ing their new hires!

Appointment closing

After determining that a lead is qualified, the logical next step is to try to schedule an appointment, introductory call or demo. The way you achieve this close will depend entirely on the channel of communication being used. Below you will find an example of how to close in the four main channels we are likely to be using for prospects in this stage of the buyer's journey:

SOCIAL SELLING (LINKEDIN)

Could you confirm your email address please so I can send through a calendar invite for a call?

SALES CHAT

I can have one of our specialists give you a call at your convenience so you can get more detailed info and ask all the specific questions you may have, what day and time this/next week works best for you?

CALL

Let's circle back for next week to go over the solutions we have for your company challenges, how does (day of the week) at (time - specify time zone)?

EMAIL

I would like to speak to you and ask a few questions about your company and the onboarding within - let me know what day and time this or next week would work out for you to jump on a 15 minute call with me.

Skaled

Questions?

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