Playbooks Strategy Worksheet

YOUR COMPANY NAME & LOGO HERE

# Instructions

Complete the worksheet on page 2 using these step-by-step instructions.

1. Identify the various “work-streams” or “sales paths” your reps use to source prospects and turn them into qualified opportunities or closed deals. Each column on page 2 should represent one workstream.

***For example:*** *BDR teams often work inbound leads generated from marketing, inbound chat inquiries, and self-source their own leads on LinkedIn.*

1. Complete Row 1 with the lead source.
2. In Row 2, for each “work-stream” document your preferred method(s) to import records into Playbooks.
   1. Options include:
      * List View (include the name of the List View)
      * Report (include the name of the report)
      * One-at-a-time from the CRM Record
      * One-at-a-time from Playbooks
      * Automatically via a Robot (include the name of the Robot)
   2. Make note of any List View, Report, or Robot that will need to be created
3. In Row 3, enter the field used to identify the Playbooks user. This is important if you are using a Robot to auto-enroll the record to Playbooks to make sure it is added to the correct Playbooks user.
4. In Row 4, what is the record’s object? This is important if you are using a Robot to auto-enroll so the Robot evaluates the correct record object. (Leads, Contacts, Accounts, and Opportunities are supported.)
5. In Row 5, what is/will be the name of the Play to manage the contact strategy for this group or records?
6. In Rows 6 – 9, complete the steps reps will take in the different scenarios. Clearly describing what these final steps are will help to preserve data integrity and process continuity. You may find that this exercise prompts you to highlight areas for improvement in your process.
7. Once completed, this table should be provided to Playbooks users, along with Play Flow map/diagram, so they can action records correctly. (Be sure to include it in training for all future new hires.)

Example for Business Development Team

|  |  |  |  |
| --- | --- | --- | --- |
|  | Web Leads | Nurture | Self-Sourced  (Title = Sales Director) |
| 1. Lead Source | Web Form | Various Sources | Self-Sourced |
| 1. Import to Playbooks via | Robot: “Hot Lead” | One-at-a-time from Playbooks | CRM Record |
| 1. Record Assignment Field | Lead Owner Field | Lead Owner Field | Lead Owner Field |
| 1. Record Object | Lead | Lead | Lead |
| 1. Play Name | BDR – New Web Leads | BDR – Web Chat | BDR – Sales Director |
| 1. If interested… | * + - 1. Mark Play Successful       2. Convert record in CRM   \*A robot will delete from Playbooks |  |  |
| 1. If contact was made and they are moderately interested… | * + - 1. Mark Play Successful       2. Remove from Play       3. Enroll in “Nurture Play” |  |  |
| 1. If not interested / DNC… | * + - 1. Delete from Playbooks       2. Check ‘Do Not Contact’ checkbox       3. Change Lead Status to “Closed – Not Converted” |  |  |
| 1. If no answer / contact | * + - 1. Enter Call Result of “No Answer”       2. Continue to end of Play |  |  |