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## Creating a Sales Toolkit

Anthony, the new sales representative, scribbles furiously on his yellow legal pad. As his colleague Carlene introduces herself to a prospect, he tries to write down everything she says. Her introduction sounds so friendly, natural, and fluid that Anthony would like to say the same thing when he calls his prospects. He worries about Carlene's reaction, though, if she were to overhear him using her opening words line-for-line.

In the cubicle to Anthony's left, Don, one of the other salespeople, begins a product demonstration. Anthony admires Don's "all the time in the world" attitude as he skillfully and patiently directs the prospect through the demonstration. Don's calm demeanor belies the fact that he has the highest demo-to-closed-sale ratio on the sales staff. Anthony would really like his assistance in improving his own closing skills, but feels reluctant to approach him. Don is so busy and successful.

Anthony notices Carlene leaving her cubicle. With Don conducting a demo and Carlene away from her desk, this might be the perfect time to make a few calls using her introduction. Neither one of them will be the wiser.



SUCH ARE THE CHOPPY WATERS THAT MANY SALESPEOPLE NAVIGATE WHEN they first join new companies. It need not be this difficult. A better way exists.

Let's look at a parallel situation. Can you imagine, even for a moment, an NFL coach holding the team playbook back from a rookie player? Can you envision that coach saying to the freshly signed rookie, "Didn't you play football in high school *and* in college? Why do you need a playbook? You know how to play the game. Just go out there and play football!"

Common sense tells you that it simply wouldn't happen, right? The playbook helps the rookie understand the team's *specific* system. It spells out the strategies and tactics the team will use to address as many situations as the coach thinks the team will encounter.

But daily, in thousands of sales offices across the country, intelligent, well-meaning business executives send new sales reps out to sell without a playbook. Instead of passing plays and defensive schemes, the sales playbook (also referred to as a toolkit or manual)

**Companies failing to provide a toolkit for new hires unknowingly increase the amount of time it**



**takes these reps to become a productive member of the sales staff.**

contains material that helps sales reps articulate the value of their company's *specific* products or services. It assists them in every step of the sales process.

Though critically important to a new salesperson's success in the early going, and relatively easy to produce, few companies invest the time and resources to

create a sales toolkit. Avoid this common sales management pitfall by creating one that contains the following:

- Introductions/voicemail scripts
- Templates for e-mail correspondence
- Qualifying questions
- Interview questions
- Common customer objections
- Objection responses
- Sample closes

Assembling a sales toolkit does require some work and many presidents worry that the entire job will fall to them. Luckily though, a toolkit involves coordinating the efforts of staff members

**At this point, you might wonder where you will find the time for all this sales stuff. So far I've asked you to create a customized welcome letter, write a compensation plan, and plot out a three-week, hour-by-hour schedule for your new sales hire. You also know that before the end of this book, I'll very likely come up with more things for you to do. (You're right!) But trust me—stick with it. This will all pay off.**



connected to sales as opposed to the president doing everything. Much of the information needed to fill the sales manual is already known by the employees, just not written down.

Many people think of a sales toolkit as exclusive to large companies with sizable marketing departments and big budgets. They picture customized three-ring binders with fancy graphics and integrated e-learning software, or an internal company website that requires constant care and feeding. While many large companies can and do produce slick-looking toolkits, the aesthetics matter less than the quality and timeliness of the information inside.

You may wonder why a sales toolkit is really a necessity for your company. If you hired someone who can sell, shouldn't they already know this stuff? Shouldn't they come prepared knowing how to introduce themselves to a prospective client or address an objection? Once they have all that figured out, wouldn't the toolkit be useless?

Yes, new hires possess some pre-existing skills and will gradually figure out what they need to know. Through trial and error, they will create an introduction; learn the most common objections, and determine the approach to closing that makes the most sense. Here's the bad news: the commodity they will use to gain all of this knowledge is time—your time!

You and your better sales reps already know what the new hires need to know. Without the toolkit, you're forcing them to reinvent the wheel. It will take new hires months to put all the pieces into a cohesive sales process. During this period their productivity suffers and they lose sales by making avoidable mistakes.

The news gets worse, I'm afraid. Without a toolkit, when new

hires complete their “self-training” you might not approve of the way they have chosen to, for example, introduce themselves, or close sales. If no standard introduction or closing methodology exists within your organization, it will be difficult for you to then get them to do things differently. They may resent the criticism. Most probably, they will continue to introduce themselves or close the sale in a way that is comfortable for them but not necessarily for you.

Imagine your NFL team again. If that rookie didn’t receive and memorize the playbook, what would happen when he went onto the field? I’ll tell you: The play would start and he wouldn’t know where to run, whom to block, or whom to cover. Both the rookie and the team would suffer from his lack of preparation. Don’t set your new salesperson up for failure; produce and deliver a quality sales playbook.

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**An executive once said to me, “One of my former sales reps had the best introduction. Every time I heard her use it, I would think ‘that’s really good.’ I only wish I’d gotten her to write it down.” By not capturing and recording the best sales practices of your company, you’re missing an opportunity to establish a sales methodology. You’re also letting your intellectual capital walk out the door when a sales rep resigns.**



## HISTORY

While doing research for this book, I read a fascinating book by Penrose Scull entitled *From Peddlers to Merchant Princes: A History of Selling in America* (Follet Publishing Company, 1967). He tells the following story about sales training:

In 1884 The National Cash Register Company employed thirteen people and produced four or five cash registers per week. By 1887, this same company employed thirty salesmen and sold nearly 12,000 cash registers during that three-year period.

Salesman Joseph H. Crane had the best record for overcoming the sales resistance and writing the most orders. Crane