What is a Sales Manual?

The sales manual is part policy, part procedures, part best practices, part how-to guide. It explains protocols and processes. It provides standards of performance. It keeps sales team members on the same page, and enables them to hold each other accountable (to the established standards, etc.). It can provide the foundation for measuring performance.

This is a living document that has to work. It’s a high-value tool that has to be:

- Accurate and up to date.
- Relevant.
- Easily accessed.
- Readily available.
- Secure.
- Readily understood.
- Easy to read and well organized.
- Actively used.

A good sales manual informs your sales team on their relevance to the organization, gives them confidence, and binds them to the ways of your organization. It shows them how they fit in, and their pivotal role—both as individuals and team members. It should give them a real understanding of the sales function and its influence on organizational success.

It should also give them all the information, resources, technical specs, product and market information, strategies, standards, practices, rules, protocols and forms they need to do their job properly and effectively.

Finally, if you want your sales manual to be highly used and solidly understood you’ll need to make it easy to access, and easy to absorb. Printing the manual is just one way of putting it in front of the team (while this is the traditional way, it has limitations). It’s also convenient to securely post the document on your company’s web platform. This is especially useful when content is updated regularly. Posting it online also makes it easy to access anytime, anywhere, by any authorized user. Some companies even create audio files in MP3 format for their road warriors.

A strong sales manual is dynamic—it changes fairly regularly, as conditions on the ground and in the market change, as your products and services change, and as your sales professionals learn new things. All sales team members are worthy contributors, and should be encouraged (prepared) to submit ideas, updates, new data, new procedures, new competitors, etc. on a regular basis.

In fact, you should have a formal process and schedule (and, perhaps, an informal one too) for updating and revising the manual. Sales teams should be cognizant of specific information they are responsible for gathering to maintain and update the sales manual.

Don’t let your sales manual go “stale.” To be useful, relevant, and effective, it has to be current all the time.

How to Write a Sales Guide (Manual)

Overview and Objective

One of the fastest ways to increase sales of your product is to educate the sales force on the key features and benefits of the product, unique advantages of the product, how to sell the product, and the competition. This can be done through sales training, a written sales guide, and/or an audio or video file. A podcast, sent out with the sales guide as a summary, is a particularly useful tool because sales people generally spend a great deal of time in the car.

The sales guide will vary drastically depending upon the target audience.A sales guide for a distribution channel, for example, might be one page. A sales guide designed for a direct sales force to sell a complex set of products may end up being multiple binders. In all cases, conciseness and good organization is important because sales people don't have much time to read and they need quick access to the information.

Requirements

Sale people make money when they are on the phone closing deals - so they often won't take the time to read a detailed sales manual. It is therefore critical that the sales guide be as concise and hard-hitting as possible. However, this objective should not compromise the quality of the information.

- Eye catching formatting - You want the document to be a great reference manual (no one will read it cover-to-cover). Information should be very easy to find so there should be a good table of contents (if it is a large guide); large, clear headings for each section and subsection; and index and/or glossary of terms. Diagrams, tables, and illustrations are best used to summarize complex information.
- Concise length - The length of the document will vary dependent upon the target audience. For channel sales people, one to two pages is best as a quick reference that they can throw in their brief case. Even if you need a large sales guide to go through detailed demonstrations and competitive information for a direct sales force, providing a quick reference summary in addition to the full guide is ideal.
- Pronunciation - A new sales person may be unfamiliar with the buzz words of your specific industry. Pronunciation must be called out wherever necessary and in the glossary of terms.
- Well marked customer sections - Sales people will often copy parts of the sales manual and hand it to customers. Sections of the manual must be clearly identified as being customer consumable or not.
- Consistent updates - A sales guide that goes out of date is useless. Consistent updates will keep your product in front of the sales person and keep them abreast of developments within the company and new competitive announcements. For this reason it is desirable to have an internal web site that has all the latest and greatest information. The printed sales guide should reference the website as a resource for updated information.

Outline

1. Contact information - Let the sales person know where they can get more information on product or on any part of the guide. Include email addresses and phone numbers.

2. Selling strategies - Outline target market, market size, sales cycle, ideal customer profile, list of current customers, references, press mentions and success stories. If this is a one-page sales guide the information must be kept to one paragraph with a few bullets.

3. Products and Demonstration - Positioning of the product, how it fits into the overall product line, a list of key features and benefits, demonstration highlights, most common customer questions, and product updates. For a one page sales guide use only the top three the key features and benefits.

4. Competition - A table of competitors with a feature matrix is the best way to show this information. Don't forget to include pricing. Short write-ups on key competitors including strengths, weaknesses, and an overview of their strategy can be useful if you have just a few competitors. Since many

competitors fall into similar categories you may want to outline a more broad strategies for competing against competitors in those categories. You may also want include write-ups of what the competitors will be saying to your customers.

5. Pricing - Include all pricing, ordering, and configuration information.

6. Collateral - All associated collateral including datasheets, brochures, and white papers.

7. Sales presentation - It is important to let the sales people know how to present the product. An online presentation detailing high-level positioning, success stories, and features and benefits with a script is great. A video of the presentation is also a useful tool.

8. Glossary - You may need a glossary of terms and acronyms associated with the product.

9. Index - Include an index if the sales manual is over 50 pages.

10. Reference Material - Include a listing of where they can find more information about the product or a specific technology. This may be links to your website or other websites.

Process to design effective sales manual

1. Gather all associated materials including a copy of the product, sample files, datasheets, presentations, competitive analysis, market requirements, documents and functional details for backup information.
2. Determine which marketing information (competitive analysis, demonstrations, presentations, etc.) needs updating or creating from scratch.
3. Get the feedback from systems engineer or product manager who has gone on sales calls and knows the key selling features of the product. Interview one or two sales people for information on how they sell the product.
4. Spend some time with seasoned sales representative to understand where they have been successful.
5. Speak to new sales representative to understand what they feel they need from a sales guide.
6. Write a first draft of all materials interactively reviewing sections as they are completed with the appropriate product manager.
7. Write second draft incorporating all the suggestions.
8. Have one or two sales people to review the document.
9. Review the second draft with product manager and technical staff.
10. Write final draft.