

THE BUSINESS LEADERS PLAYBOOK FOR **SALES**

A comprehensive guide for business leaders to build, manage and optimise their sales function for predictable, scalable revenue growth.

Presented by Leadership Services
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Chapter 1: Introduction - Why Sales Leadership Matters

Revenue is the lifeblood of every business. Yet many growing companies rely on the founders energy or a handful of key relationships rather than a structured, scalable sales function. This playbook provides the frameworks and tools needed to build a sales engine that delivers predictable, sustainable growth.

The Cost of Poor Sales Leadership

Impact Area	Without Leadership	With Leadership
Revenue	Unpredictable, feast or famine	Consistent, forecasted growth
Pipeline	No visibility, reactive selling	Structured pipeline with clear stages
Team	High turnover, inconsistent performance	Coached, motivated, high-performing team
Process	Every rep does it differently	Repeatable, scalable sales methodology
Customer Value	Transactional, price-driven sales	Value-based, relationship-driven growth


 *Leadership Tip: If your revenue depends on one or two key people, you do not have a sales function - you have a vulnerability.*

Chapter 2: Sales Strategy and Revenue Planning

A sales strategy translates business growth ambitions into a clear, actionable plan with defined targets, territories, and tactics. Without it, sales activity becomes scattered and results become unpredictable.

Revenue Plan Template

Element	Q1	Q2	Q3	Q4	Annual
Revenue Target					
New Business Target					
Existing Customer Growth					
Average Deal Size					
Deals Required					
Pipeline Required (3x)					
Proposals Required					
Meetings Required					
Leads Required					

 *Leadership Tip: Work backwards from your revenue target. If you need 1M in new business with a 50K average deal size, you need 20 deals, which means roughly 60 proposals and 180 qualified meetings.*

Chapter 3: Building Your Sales Process

A defined sales process is the foundation of a scalable sales function. It creates consistency, enables coaching, improves forecasting, and ensures no opportunity falls through the cracks.

Sales Process Stage Map

Stage	Activities	Exit Criteria	Probability	Avg Duration	Owner
1. Prospect	Research, outreach, qualification	Interest confirmed, meeting booked	10%	1-2 weeks	SDR/Sales
2. Discovery	Needs analysis, pain identification	Needs documented, budget confirmed	25%	1-2 weeks	Sales Rep
3. Solution	Propose solution, demo, proof of value	Solution accepted in principle	50%	2-3 weeks	Sales Rep
4. Proposal	Formal proposal, pricing, terms	Proposal submitted and reviewed	65%	1-2 weeks	Sales Rep
5. Negotiation	Terms discussion, objection handling	Agreement on terms	80%	1-2 weeks	Sales Manager
6. Close	Contract signed, onboarding initiated	Signed contract received	100%	1 week	Sales Rep

 *Leadership Tip: Document your sales process and ensure every team member follows it. Consistency in process creates predictability in results.*

Chapter 4: Pipeline Management and Forecasting

Your sales pipeline is a window into your future revenue. Effective pipeline management ensures you always know where you stand, what is at risk, and where to focus effort for maximum impact.

Pipeline Health Scorecard

Metric	Current	Target	Action
Total Pipeline Value		3x quarterly target	
Pipeline Coverage Ratio		3:1 minimum	
Average Deal Size			
Win Rate		25-35%	
Average Sales Cycle			
Pipeline Velocity		Increasing QoQ	
Deals in Each Stage		Balanced distribution	
Stalled Deals (30+ days)		Under 20% of pipeline	

Weekly Forecast Template

Deal	Value	Stage	Probability	Weighted Value	Close Date	Risk	Next Action

 *Leadership Tip: If a deal has not moved stages in 30 days, it is likely stalled.*

Take action immediately or remove it from your forecast.

Chapter 5: Sales Team Structure and Recruitment

Building the right sales team is critical. The structure depends on your market, product complexity, and growth stage. Getting the mix of hunters and farmers right determines whether you grow sustainably.

Sales Team Structure by Revenue

Revenue Stage	Recommended Structure	Key Roles	Estimated Cost
Under 1M	Founder-led + Part-time Sales Director	Fractional Sales Director, 1-2 Sales Reps	30-80K
1-5M	Small sales team + Part-time Sales Director	Sales Director, 2-4 Sales Reps, SDR	100-250K
5-20M	Full sales team	Sales Director, Sales Managers, Reps, SDRs	300-800K
20M+	Sales department	VP Sales, Regional Managers, Teams, Ops	800K+

Sales Recruitment Scorecard

Competency	Weight	Score (1-5)	Weighted Score
Track record of hitting target	25%		
Industry/market knowledge	15%		
Sales methodology experience	15%		
Communication and presentation	15%		

Resilience and work ethic	10%		
CRM and technology proficiency	10%		
Cultural fit	10%		
TOTAL	100%		

 *Leadership Tip: Hire salespeople based on evidence of past performance, not on how well they sell themselves in an interview.*

Chapter 6: Sales Performance Management


Managing sales performance requires clear targets, regular coaching, and accountability. The best sales teams combine individual ambition with team discipline and a culture of continuous improvement.

Individual Performance Tracker

Rep Name	Target	Actual	% Achievement	Pipeline	Meetings	Proposals	Conversion Rate

Sales Coaching Framework

- Weekly 1:1 coaching sessions focused on pipeline and development
- Monthly deal reviews for all opportunities over target threshold
- Quarterly performance reviews against targets and competencies
- Call and meeting observations with structured feedback
- Skills gap analysis and personalised development plans
- Peer learning sessions sharing best practice across the team
- Celebrate wins publicly and coach failures privately
- Link development activities to career progression pathways

 *Leadership Tip: The difference between a good sales team and a great one is the quality of coaching. Invest 20% of your sales leadership time in coaching.*

Chapter 7: CRM and Sales Technology

Your CRM is the operating system of your sales function. When used properly, it provides pipeline visibility, automates administration, and generates the insights needed to improve performance. When used poorly, it becomes a data graveyard.

CRM Health Check

Area	Score (1-5)	Issues	Action
Data Quality			
User Adoption			
Pipeline Accuracy			
Reporting Capability			
Integration with Other Tools			
Automation Utilisation			
Mobile Access			
Management Dashboards			

 *Leadership Tip: If your sales team does not trust the data in your CRM, they will not use it. Data quality is the foundation of CRM success.*

Chapter 8: Pricing Strategy and Value Selling

Pricing is one of the most powerful levers for profitability. A 1% improvement in pricing typically delivers a 10% improvement in profit. Yet many businesses set prices based on cost-plus or competitor matching rather than the value they deliver.

Pricing Strategy Assessment

Factor	Current Approach	Best Practice	Gap	Action
Pricing Model		Value-based pricing		
Price Review Frequency		Quarterly minimum		
Discount Authority		Defined approval matrix		
Average Discount Given		Under 10%		
Price Increase Strategy		Annual with value justification		
Competitive Intelligence		Regular monitoring		

 *Leadership Tip: Train your sales team to sell value, not price. The conversation should always focus on the business outcome your solution delivers, not the cost.*

Chapter 9: Key Account Management

Your existing customers are your most valuable revenue source. Key account management ensures your most important relationships receive the strategic attention they deserve, driving retention, growth, and advocacy.

Key Account Plan Template

Element	Account 1	Account 2	Account 3
Account Name			
Annual Revenue			
Growth Potential			
Key Contact			
Decision Maker			
Current Products/Services			
Upsell Opportunities			
Retention Risk (1-5)			
Next Review Date			
Account Owner			

 *Leadership Tip: Schedule quarterly business reviews with your top 10 accounts. These reviews strengthen relationships and uncover growth opportunities.*

Chapter 10: New Business Development

New business development is the fuel for growth. A structured approach to prospecting and outreach ensures a consistent flow of new opportunities into your pipeline, reducing dependence on existing customers or referrals.

Prospecting Activity Tracker

Activity	Daily Target	Weekly Target	Monthly Target	Actual	Conversion Rate
Outbound Calls					
Emails Sent					
LinkedIn Outreach					
Meetings Booked					
Proposals Sent					
Networking Events					
Referrals Generated					

 *Leadership Tip: New business development is a numbers game driven by quality. Track both activity levels and conversion rates to optimise your approach.*

Chapter 11: Sales and Marketing Alignment

Misalignment between sales and marketing is one of the most common and costly problems in growing businesses. When these functions work together with shared goals and clear handoffs, the results are transformational.

Sales and Marketing SLA

Commitment	Marketing Delivers	Sales Delivers
Lead Volume	X MQLs per month	Follow up within 24 hours
Lead Quality	Defined qualification criteria met	Feedback on lead quality weekly
Content Support	Sales collateral and case studies	Input on customer objections and needs
Pipeline Contribution	30-50% of pipeline from marketing	CRM updated with lead source data
Reporting	Monthly marketing performance report	Pipeline and conversion data shared
Communication	Weekly alignment meeting	Feedback loop on campaign effectiveness


 *Leadership Tip: Hold a weekly 30-minute sales and marketing alignment meeting. This single habit will dramatically improve collaboration and results.*

Chapter 12: Sales Enablement and Training

Sales enablement equips your team with the tools, content, and knowledge they need to sell effectively. It bridges the gap between strategy and execution by ensuring every sales interaction is informed, professional, and aligned with your value proposition.

Sales Enablement Checklist

- Sales playbook documented with objection handling guides
- Product/service one-pagers for each offering
- Case studies with measurable results for key sectors
- Proposal and presentation templates
- Competitive battlecards with differentiation points
- ROI calculator or value assessment tool
- Email templates for each stage of the sales process
- Onboarding programme for new sales hires
- Ongoing training calendar with skills development
- Video library of best practice calls and presentations

 *Leadership Tip: Ask your sales team what tools and content they need to sell more effectively. They know better than anyone what is missing.*

Chapter 13: Channel and Partner Sales

Selling through partners and channels can accelerate growth without proportionally increasing your sales team. The key is selecting the right partners, providing them with the tools to succeed, and managing the relationships actively.

Channel Partner Assessment

Partner	Type	Market Reach	Revenue Contribution	Engagement Level	Support Required	Rating

 *Leadership Tip: Treat your channel partners like an extension of your sales team. Invest in their enablement and they will invest in selling your solutions.*

Chapter 14: Sales Compensation and Incentives

Compensation drives behaviour. A well-designed sales compensation plan attracts top talent, motivates performance, and aligns individual incentives with business objectives. A poorly designed plan creates the wrong behaviours and drives good people away.

Compensation Structure Comparison

Model	Base/Variable Split	Best For	Pros	Cons
High Base	80/20	Complex, long-cycle sales	Stability, retention	Lower motivation for overperformance
Balanced	60/40	Mid-cycle B2B sales	Good balance of security and motivation	Moderate risk for underperformers
High Variable	40/60	Transactional, short-cycle	Maximum motivation	Higher turnover, less teamwork
Commission Only	0/100	Independent reps, agents	Zero fixed cost	Difficult to recruit, low loyalty


 *Leadership Tip: Pay for the behaviours you want. If you want new business, incentivise new logos. If you want growth, incentivise account expansion.*

Chapter 15: Sales Analytics and Reporting

Data-driven sales management outperforms intuition-based management every time. The right metrics and reports give you early warning of problems and clear visibility of what is working and what needs to change.

Sales Dashboard KPIs

KPI	Definition	Current	Target	Trend
Revenue vs Target	Actual revenue / target revenue		100%+	
Pipeline Value	Total value of active opportunities		3x target	
Win Rate	Deals won / deals closed		25-35%	
Average Deal Size	Total revenue / number of deals		Growing QoQ	
Sales Cycle Length	Average days from first contact to close		Decreasing	
Customer Acquisition Cost	Total sales cost / new customers		Decreasing	
Activity Metrics	Calls, meetings, proposals per rep		On target	
Churn Rate	Customers lost / total customers		Under 10%	

 *Leadership Tip: Review sales analytics weekly with your team. Make data-driven decisions about where to focus time and resources for maximum impact.*

Chapter 16: When to Bring in a Sales Director

This playbook has provided the frameworks and tools to manage your sales function. However, there comes a point where every growing business needs dedicated strategic sales leadership.

Signs You Need a Sales Director

- Revenue growth has plateaued or become unpredictable
- You have no formal sales process or methodology
- Pipeline visibility is poor and forecasting is guesswork
- Sales team performance is inconsistent across individuals
- You are losing deals to competitors you should be winning
- Customer acquisition cost is increasing
- The founder is still the primary salesperson
- You have sales reps but nobody coaching or leading them
- Pricing is reactive and margin is eroding
- You are planning growth that requires a step change in sales capability

The Part-Time Sales Director Model

Factor	Full-Time Hire	Part-Time Sales Director
Annual Cost	70-130K + benefits + recruitment fees	21-50K depending on days required
Time to Start	3-6 months recruitment process	Immediate - start within days
Experience Level	One background and perspective	Multiple sector and sales experience
Risk	High - long notice periods, redundancy costs	Low - flexible contracts, no long-term tie-in
Strategic Impact	Dependent on individual capability	Proven frameworks from multiple businesses
Team Development	Can mentor but one perspective	Brings best practice from across industries

Leadership Services provides experienced part-time Sales Directors who join your

team and deliver transformative sales leadership from day one.

Ready to Transform Your Sales?

- Call: 0330 236 8932
- Email: hello@leadership-services.co.uk
- Web: www.leadership-services.co.uk
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