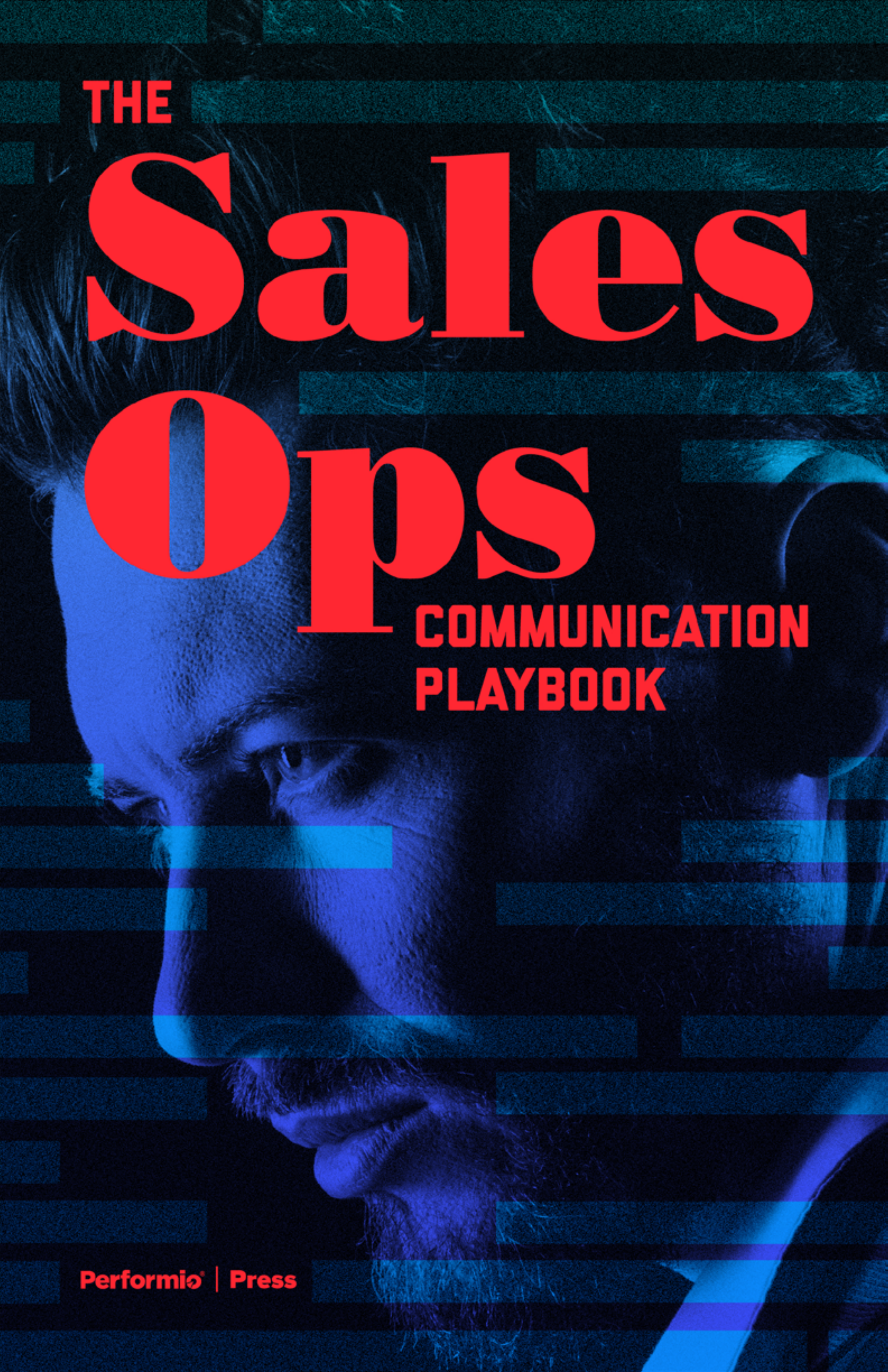
THE Sales Ops COMMUNICATION PLAYBOOK



Performio | Press

WHENEVER I HEAR THE WORD "FILL-IN-THE BLANK" Ops,

I feel like I'm thrust into the suspense of a Tom Clancy novel intricately planning each move within any given special op. Threading the needle of strategy to accomplish said mission. SalesOps, MarketingOps, RevOps...together these special operators dig in and do the work to win the day. But what is the cornerstone to any successful mission? Whether on the battlefield of a suspense thriller or on a sales team there's one common element that's crucial...Whiskey, tango...foxtrot, copy...Communication.

In this ebook we'll explore the three key elements of SalesOps communication to ensure you have the strategic plan to win and the backup you need for success.

Sales operations teams work to empower the broader sales department by developing strategies, defining territories, streamlining sales processes, **creating sales comp plans**, and more. And communication is key to executing every one of these functions well.

The sales ops team must be able to lay out their vision for the sales department, making a compelling case for the direction they plan to head. They need to clearly articulate the details and benefits of the **sales compensation plan** providing transparency into the reasoning that informed the plan's policies. And they have to explain any adjustments to sales priorities or processes, walking the sales team through everything they need to know about new products or acquisitions.

In order to communicate these things effectively, sales ops leaders need to hone their efforts in three main areas:

- Planning their communications
- Executing their communications
- Working with other leaders to roll out their communications

In this guide, we'll help you master all three areas of sales ops communications, walking you through the process to ensure that the sales department can fully benefit from sales ops' planning.

HOW TO MAKE A Sales Ops COMMUNICATION PLAN

Whether sharing the vision for the team, explaining a new sales comp plan, or addressing a shift in priorities, it's essential to start by carefully planning your communications. This includes both planning what you'll communicate and also planning when you'll communicate.

PLAN WHAT YOU'LL COMMUNICATE

When planning what to communicate, you need to develop a narrative. Rather than simply sharing a piece of information that'll be easy to ignore or forget about, turn it into a story with a compelling purpose that yields direct benefits, and it'll be much easier to grasp and harder to overlook.

The basic piece of information you need to convey will be obvious: "We're making X adjustments to the sales comp plan."

But what story lies behind that change? And what's the deeper reasoning that led to this introduction? Tie it all the way back to the company's mission and values, and explain how the sales team will directly benefit from the change:

"At our company, we value growth and innovation. We saw an opening in our market segment to develop product Y, and we expect it to grow revenue by Z over the next year. That will put our company in a much stronger position, increase job security, and give sales reps the chance to earn exciting new commissions. We're therefore making X adjustments to the sales comp plan to accommodate the new product."

That's the real what you need to communicate.

While telling the story, be sure to keep it simple. Aim for clarity of purpose, and don't overcomplicate things with unnecessary details. Your full documentation for the comp plan can and should include all the precise calculations, but for the initial communication, you should focus on making the case for the new direction.

It's important to make the outcomes of these changes easy to understand for the people you're communicating to. It's a good idea to run simulations showing what reps can expect to make now versus before. Use charts and graphs to visually show the before and after, demonstrating the potential for increased earnings.

And prepare yourself for backlash. People are creatures of habit, and change can be hard, even when it's for the best. Try to anticipate questions and objections, and come ready with answers already formulated. Plan for both "why" and "why not" questions—sales reps will want to know the reason for devaluing one sales activity as much as the reason for incentivising another.

In all of this, the goal is to take a preventive-care approach to sales ops communications. Treating communication as an afterthought can lead to confusion or even outrage. You never want the sales team to feel blindsided by a change because it just wasn't communicated well enough.

And while it can be tempting to believe you just don't have enough time to plan out your communications, the reality is that it takes much longer to correct miscommunications after the fact than it would to plan properly in the first place. You'll save more time in the long run by preparing in the short run.

PLAN WHEN YOU'LL COMMUNICATE

For any major communication, you'll want to establish a timeline for meeting and talking with each relevant stakeholder. Some people and teams will be much easier to secure a meeting with than others, so you'll want to get this whole schedule locked down as early as possible. Otherwise, you could end up with gaps of time waiting for the next availability, pushing the whole process back as a result.

Exactly who you'll need to communicate with and when may vary based on your organization and the specifics of what it is you need to communicate.

But as an example, a timeline for communicating a new sales comp plan may look like the following:

- Meet with sales leaders and other stakeholders before finalizing the sales comp plan.
- Host an in-person kickoff meeting to introduce the new plan.
- Attend follow-up meetings at the team level to evaluate adoption of the plan.
- Set aside time for one-on-one meetings after any major announcements to address ongoing concerns.

Establishing a clear timeline—and then sticking with it—helps to ensure a smooth process from start to finish.

HOW TO ROLL OUT Sales Ops COMMUNICATIONS

A successful communications rollout comes from careful planning and clarity of purpose. Approach the rollout strategically, and don't leave anything to chance. We'll walk you through what that looks like.

ALWAYS BE PREPARED

Poor communication stems from poor planning. You always want to ensure you've completed all the necessary preparations before rolling out sales ops communications.

This includes creating thorough documentation before making any major announcements. If you're rolling out a whole new sales comp plan, then obviously you'll need the plan document itself. But even for smaller changes or updates, you'll want the details laid out in text for the team to reference at any time.

You'll also want to create visual cheat sheets specific to each relevant role, walking stakeholders through the most important pieces of information they'll each need to know.

Ideally, all such documentation should be stored in a centralized location. Performio's Incentive Compensation Management (ICM) software lets you store important sales information with role-based access, ensuring that those who need to see it can, while keeping sensitive information limited to those with proper permissions.

Performio also provides a handy what-if calculator that allows sales reps to experiment with different sales activities and see exactly how they would affect their overall earnings, providing an additional hands-on form of communication to help them understand the new changes.

Finally, you'll need to master your talking points—for all the different meetings included in your timeline of communications. You don't necessarily need to script entire speeches, but you should carefully outline all the major elements you plan to cover, as well as your responses to anticipated questions or objections.

FOCUS ON CLARITY

Wrapping your communications into a narrative helps employees identify with and embrace the vision being set forth. When you do this, it's important to clarify all the ways in which the new changes will affect each person it impacts.

That means talking about the specific advantages of the change to the company as a whole. It means explaining how customers are going to benefit from it. It means discussing the shift in focus for the sales force. It means going through the specific priorities at the sales team level. And it especially means talking about changes to each individual role.

Employees should come away from your communications with a clear understanding of exactly what the change means for them, as well as:

- Why the change is important

- What new direction they should be heading
- What specific strategies and talking points they'll need for the change
- How to maximize their take-home earnings

Transparency is key. If employees are just told what to do but not why to do it or how it benefits them, they may begrudgingly comply, but they won't be at their most efficient. However, a well-informed sales team is a motivated sales team, and a motivated sales team is a productive sales team.

HOST A KICKOFF MEETING

The kickoff meeting will be a high-level introduction to the plan document. You're setting the vision for the change, establishing the narrative for why the change is happening, and beginning to orient employees into what they can expect this change to mean for them.

This meeting should be in person if feasible. However, in today's age of remote work, a video conference meeting is a perfectly acceptable option. What's most important is that you're able to have a two-way conversation.

You absolutely don't want to rely on sending out an impersonal communication blast that can be easily overlooked or ignored. You should be able to see each other's faces, they should be able to ask questions, and you should come prepared to answer them.

Your presentation doesn't need to get too into the weeds—that's what the full documentation is for—but you should come with those details readily accessible for anyone who may ask about them.

And make sure to specifically plan for a Q&A time. Don't just leave five minutes for a handful of questions after the presentation. Schedule the meeting to leave plenty of time, and then actively encourage questions and feedback. The more interactive this meeting can be, the more employees will feel personally involved with and committed to the new direction.

BE PROACTIVE ABOUT MEETING WITH INDIVIDUAL TEAMS

After the initial kickoff meeting, you'll want to meet with each individual team to go over the specifics of what these changes mean for them.

Plan on having these meetings as soon as possible after the kickoff meeting so the vision will still be fresh in team members' minds, and they won't have had too much time to forget about why the change is so important. As we discussed earlier, you'll want to have the timeline for these meetings established before you begin any of the communications rollout.

At these meetings, you'll be reaffirming the narrative you established at the kickoff meeting, walking the team through the details of what the changes will mean for their day-to-day work, going over new talking points and strategies they'll be using, and addressing any additional questions they may have, and ensuring they know where to find the full documentation for further reference.

After attending such a meeting, a given sales team should be well informed, equipped, and ready to carry out the new plan. But you should be prepared for one more step in the communications rollout as needed.

COMMUNICATE YOUR AVAILABILITY FOR FURTHER ONE-ON-ONE DISCUSSIONS

While not everyone is going to need or want a one-on-one meeting to discuss the new plan, many team members will, and you should make it clear that you're available to have such discussions.

Some employees simply aren't as comfortable asking questions or seeking clarification in group settings. Some may need reminders about significant changes in expectations. And many will have questions that they don't think to ask until they're actually working on the new plan and applying it to their individual situation.

Whatever the reasons for such individual meetings, you need to make sure you're available to have them. While you obviously can't schedule these meetings with specific individuals until you know who will require them, it's a good idea to block out windows of general availability to accommodate such requests during the rollout stage.

INCREASE YOUR EFFECTIVENESS BY PARTNERING WITH OTHER DEPARTMENTS

Sales ops doesn't need to go it alone when communicating a new sales comp plan or other major changes. Working with other departments can provide a broader perspective, ensure that the changes will work well for the whole company, and ultimately help get your message out.

Be sure to meet with department leaders well before your plan is finalized or your changes are made. You want to get their feedback while you still have time to implement it. Ask for their thoughts, concerns, and ideas. This will not only help you refine your plan, but it'll also generate buy-in from the other department leaders who now feel invested in the changes.

You should also make an effort to sit in on sales calls, sales team meetings, and sales department meetings. It'll show support for the other departments, and it can give you a firsthand understanding of how things actually run on the front lines.

USE A CENTRALIZED PLATFORM TO FACILITATE COMMUNICATIONS

No team member should ever be left guessing where they need to go to find critical information. They shouldn't have to pour over spreadsheets, navigate a poorly organized shared drive, or dig through a stack of printed documents to gain the information they need to do their jobs. And while a well-planned rollout strategy can get things started off right, employees will always need the ability to reference the full plan or other important documents. You need a single source of truth to store all essential information.

Performio's ICM software provides you with a centralized repository for important documents, with role-based access that ensures everyone can see the information they need, while restricting sensitive documents to those who need access. It also provides interdepartmental messaging, what-if calculators, performance tracking, and more.

Ready To See

WHAT PERFORMIO CAN DO FOR YOUR BUSINESS?

Request a demo with one of our experts today.

Request A Demo

BECOME A SALES OPS SPECIAL OPERATOR

By upleveling your sales commission tech and finally breaking free from the complications of managing compensation, you can NOW focus on what you do best...Driving Performance on your teams.

Special Sales Ops Teams need the best tech to optimize performance.

Performio | Press