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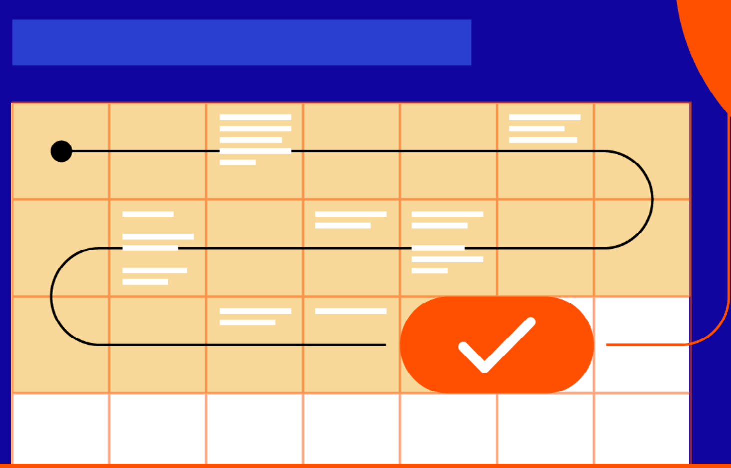
Checklist for Effective Role-Plays

It's cliche but true: Practice makes perfect.

In the field of sales, reps get one chance to make an impression on a buyer and effectively move them further down the funnel—so how can you give them an opportunity to practice and perfect these buyer interactions? Role-plays.

Use this checklist to make sure you're providing role-playing opportunities that strengthen seller skills, knowledge, and behaviors.



1. Find a virtual role-play tool

- [ ] Rather than scheduling individual, in-person pitch practices with every rep, use a virtual role-playing tool. In the current remote and hybrid work environment, these tools allow sellers to record their video pitches—and you to review those recordings—at a time that's convenient for both of you.

2. Establish a cadence

- [ ] A one-time practice session may help in the short term for a specific buyer or deal, but ongoing practice is what leads to long-term results. Mindtickle's 2022 State of Sales Readiness report found that top-performing companies have sellers do four role-plays per year. Set up a quarterly cadence for assigning role-plays (and adhere to it!) and, if possible, increase the frequency over time.

3. Determine different selling scenarios to practice

- [ ] Every buyer, seller, and interaction between the two is different, so using a one-size-fits-all approach to role-plays will fail to have widespread impact. Depending on where a rep needs help, assign them a role-play that pushes them to improve those skills or behaviors. These could focus on product knowledge, conveying marketing messaging, or leaving a voicemail with a potential customer.

4. Include written role-plays

- [ ] Today, more and more selling activities are taking place via email and social media. The written word can be just as important and effective as the spoken one and salespeople must hone their writing abilities for discovery emails, call scheduling, meeting recaps, event invitations, and much more. Incorporate written role-plays to help sales reps sharpen this critical skill.

5. Keep pitches at 2 to 4 minutes

- [ ] The best-performing salespeople are those who are concise and communicate only the most relevant and important details to the buyer they're speaking to. Encourage reps to stay out of the weeds and only include key points initially to keep pitches at four minutes or less. Including too much information can overwhelm the buyer before giving them the opportunity to learn how your product provides value.

6. Give reps multiple chances to get the pitch right

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7. Make submissions easy

☐ Typically, sales technologies that have integrated role-play tools will also offer a simple way for reps to send their pitches directly to their managers. Those managers can then easily open and review the recordings to provide focused feedback.

8. Provide feedback

☐ Speaking of feedback, your reps won't learn or improve if their recorded practices are sent off and never heard about again. It's imperative that sales or enablement managers evaluate a seller's performance and offer input as to what is acceptable and what should be worked on. Ensure that the feedback is relevant to your key rep competencies and, to provide more value, offer it in writing.

9. Track how learning is applied

☐ How are you going to determine whether the role-play and resulting feedback has an effect on real-world performance? Implement proper processes and tools that allow you to do so. One example of this is conversation intelligence, which leverages AI to record, transcribe, and analyze rep calls, giving you visibility into how role-plays translate to actual buyer communications.

To sum this all up in one handy checklist:

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2. Establish a cadence
3. Determine different selling scenarios to practice
4. Include written role-plays
5. Keep pitches at 2 to 4 minutes
6. Give reps multiple chances to get the pitch right
7. Make submissions easy
8. Provide feedback
9. Track how learning is applied

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