SalesRabbit®

Tips & Tricks for Success

Amplify
Customer Playbook:

+17%

+61%

+107%

(10%)

(60%)

(30%)
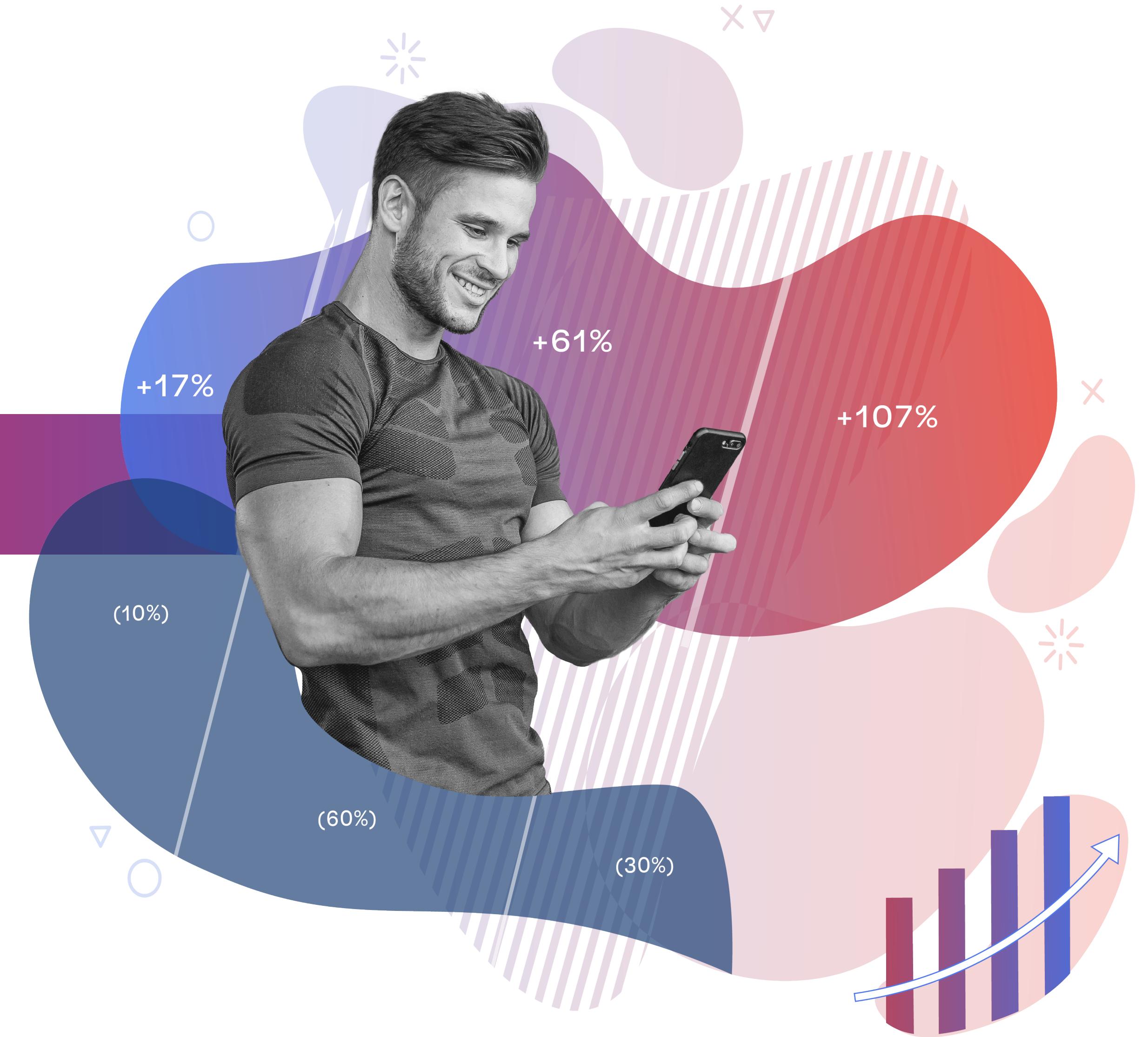
Welcome to SalesRabbit's Amplify Playbook, where innovation meets performance. Our cutting-edge Amplify solution is not just about games; it's a strategic approach to revolutionize your field sales team's productivity.

By leveraging the power of data-driven motivation, we bring you a playbook designed to unlock remarkable results for any Amplify user. Get ready to step into the future of sales performance enhancement with these expert insights.

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Amplify and what it means for field sales

Amplify Gamification and Amplify Analytics are the motivation and reporting tools available within the SalesRabbit platform. These features are designed to motivate any rep whether they're bottom, middle, or top performers all while helping managers get the sales reporting tools they need to quickly and accurately run their business.

Why is SalesRabbit creating the Amplify playbook?

Creating a playbook for the Amplify product not only arms current users with new insider tips, but showcases the best way to use the Amplify product for users like you and potential users.

- Customized Onboarding: A customer playbook allows us to tailor the onboarding process to each client's unique needs. This personalized approach is helpful for everyone involved.

- Consistency and Standardization: By defining a playbook, we ensure that every customer receives a consistent experience.

- Efficient Training and Support: A well-structured playbook helps us support you and provide effective assistance to customers like you.

- Scaling Our Business: As we work on Amplify and aim to scale, having a playbook becomes essential. It helps in relaying successful customer interactions and expanding our user base without sacrificing quality.

- Data-Driven Insights for you: A playbook can include metrics and KPIs for evaluating customer success. This data-driven approach allows us to make informed decisions, iterate on your strategies, and improve the product.

- Cross-Functional Alignment: In a company like SalesRabbit, involving multiple teams in creating and using the playbook ensures cross-functional alignment. Sales, customer support, marketing, and product development all work together toward a common goal: to help our customers use Amplify to its full potential.

Chapter 1

Getting Started with Amplify

Bartle's Four Player Types

In field sales, unlocking motivation is the key to success. Sales managers who take the time to understand the following four player types and use a sales gamification platform can tap into motivation and propel their sales team's performance to new heights—by as much as 107%.

Whether they know it or not, each member of your sales team is a mixture of the following Four Bartle Player Types, and each sales rep has one primary player type that dictates how they are motivated.

If you're wondering what your player type is (or the player types of your coworkers), use our 2-minute survey to find out.

In field sales, the Killer player type makes up roughly 24% of salespeople, whereas Achievers and Explorers both boast a higher percentage of 43% and 28%. Unlike other professions, Socializers are actually the least prevalent player type at 5%. This is going to come in handy when you need to decide what your organization should prioritize within Amplify.

Killer—24%

Killers are defined by a focus on winning, rank, and direct peer-to-peer competition.

Achiever—43%

Achievers are defined by a focus on obtaining status and achieving preset goals quickly or completely.

Explorer—28%

Explorers are defined by a focus on exploring and a drive to discover the unknown.

Socializer—5%

Socialites are defined by a focus on socializing and a drive to develop a network of friends and contacts.

Organizational Identity: Seasonal, Blitz, or Year-Round

In our field, three approaches shine: Seasonal Sales, Blitzing, and Year-Round Selling. You can mix and match!

To make Amplify work its magic, understand your customer's sales identity. This impacts everything—data, user experience, rewards, and more. Dive in, explore your options, and let Amplify transform their sales approach into a powerhouse of success.

1. Seasonal Sales Companies

Seasonal sales companies focus their efforts during specific times of the year when demand is naturally higher. This could be influenced by holidays, weather patterns, or industry-specific cycles.

Key Characteristics:

• Peaks and Valleys: Intense periods of activity followed by quieter times.
• Targeted Marketing: Strategies aligned with seasonal trends.
• Planning Emphasis: Detailed planning for peak seasons.

Tips for Success:

• Forecasting: Accurate prediction of peak seasons.
• Agile Strategies: Adaptability for changing market conditions.
• Inventory Management: Efficient handling of stock fluctuations.

2. Blitz-Oriented Sales Companies

Blitz-oriented sales companies concentrate their efforts in short, intensive bursts of activity. The focus is on achieving immediate results through high-impact campaigns.

Key Characteristics:

- Intense Campaigns: Short and focused bursts of sales activity.
- Urgency and Momentum: Creating a sense of urgency in the market.
- Rapid Follow-up: Quick response and follow-up after campaigns.

Tips for Success:

- Strategic Timing: Planning blitzes during optimal market conditions dependent on your industry.
- Team Alignment: Ensuring all team members are ready for intense periods.
- Data-Driven Approach: Analyzing results on a weekly, monthly, or quarterly basis for continuous improvement.

3. Year-Round Sales Companies

Year-round sales companies maintain a consistent level of sales activity throughout the entire year. They aim for steady growth and long-term relationships with clients.

Key Characteristics:

- Consistent Engagement: Maintaining ongoing relationships with clients.
- Diversified Strategies: Utilizing a mix of marketing and sales approaches.
- Long-Term Vision: Prioritizing customer satisfaction and loyalty.

Tips for Success:

- Relationship Building: Cultivating long-term connections with clients.
- Market Monitoring: Staying informed about industry-specific trends throughout the year. (For solar, think NEM 3.0, uses of battery storage, etc.)
- Continuous Improvement: Regularly reviewing and refining strategies to maintain steady growth throughout the year.

Are you number 1, 2, or 3? Identify your sales type before moving onto the next sections of Amplify.

Chapter 3
Amplified Sales Culture & Recruiting

Sales rep turnover and burnout is a problem affecting nearly every field sales company at one time or another.

Sales is a hard industry so it makes sense, but there are now ways to combat this.

Firstly, by recruiting talent that actually wants to be at your company is going to ensure they stick around longer than the traditional recruit, but above all else, creating a winning sales culture is going to pay off in the long run for your team. Here are 3 ways to do it using Amplify software.

3 Ways to Cultivate Success Through Amplify

1. Elevating Dynamics Through KPI Report Cards and Competitions

- Dynamic KPI Reporting: Amplify transforms data into a catalyst for success, cultivating a culture driven by visible progress and achievements.
- Proactive Teams: Witness a surge in pre-sale activities as teams strive to surpass benchmarks, infusing sales with a proactive and results-oriented ethos.
- Friendly Rivalry: Office and team competitions, along with high-stakes sales tournaments, ignite a spirit of friendly competition, fostering excellence and team bonding.

2. Gamifying Success with Rewards and Achievements

Gamification Element: Embed success into daily tasks by leveraging Amplify's Rewards and Achievements, building motivation for reps in ways that matter to them individually.

Celebration of Accomplishments: Recognize and reward individual and team milestones, creating a positive feedback loop that propels the entire team forward.

3. Recruitment Advantage: Building a Winning Team and Community

- Attraction and Retention: Amplify's vibrant sales culture, showcased through dynamic KPI reporting and engaging competitions, attracts top talent. The culture of celebrating success reduces turnover rates, creating an environment where individuals not only thrive but also choose to stay.

- Tight-Knit Community: Amplify fosters a sense of belonging and community. The shared successes and engaging features create strong interpersonal connections, making the workplace more than just a job—it becomes a community on the path to continuous triumph. This camaraderie helps build lasting relationships and loyalty within the team.

Key Performance Indicators & Analytics

Data is a manager's best friend. Without accurate rep data, leading their team is harder than it needs to be. Within Amplify, there are several ways to create and understand Key Performance Indicators (KPIs) and the reporting analytics of your team.

Unleashing the Power of Metrics

This chapter is your guide to leveraging Amplify's capabilities to empower your clients through KPIs and analytics. Tailor this information to each client's unique needs, ensuring they harness the full potential of data for strategic decision-making.

1.

### Clean Reporting for Informed Decision-Making

- The Gamification Advantage: Amplify is a data transformer. Our platform is designed to seamlessly track your client's KPIs, offering clean and intuitive reporting, so sales activity is recorded right where it's being tracked and managed. From managers overseeing the big picture to individual reps focused on their unique contributions, everyone gets a clear view of performance.

- One-of-a-Kind Metrics: Customize your metrics to reflect the uniqueness of your client's objectives. One-off metrics provide a snapshot of current performance, helping teams stay agile. The real-time nature of these metrics ensures quick responses to changing dynamics, and enables your team to measure what matters to your managers and reps.

2.

Burn-down and Target Metrics

- Strategic Insights: Burn-down Metrics break down the journey to success into manageable milestones. Watch as goals are achieved, one step at a time. Target Metrics, on the other hand, provide a roadmap for the future. Set clear objectives and empower your clients to track progress toward their long-term vision.

- Customer Conversion Rates: Highlighting conversion rates on specific metrics is the secret sauce. Enable your clients to pinpoint areas for improvement, celebrate successes, and refine strategies. The ability to visualize the impact of their efforts adds a strategic layer to their decision-making process.

3.

Empowering Every Level of the Organization

- From Managers to Reps: Amplify's analytics aren't just for the C-suite. Managers can (and should) dive into comprehensive reports, while individual reps get insights tailored to their contributions. This democratization of data ensures everyone has the tools they need to enhance performance and contribute to the bigger picture.

- Continuous Improvement: Armed with clean, actionable data, your team can foster a culture of continuous improvement. The ability to measure, adapt, and thrive based on data-driven insights positions them for sustained success.
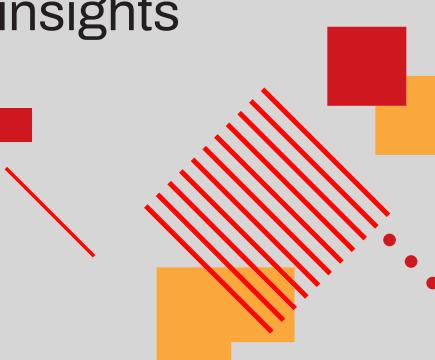
Your Competition Strategy and Schedule

Competitions are something motivating to nearly every single one of the four Bartle Player Types—this is a feature of Amplify that is absolutely essential for all field sales teams regardless of size or industry.

Our formula: Behavior Driving, Energy, Results, Rewards, Repeat. This is everything you need for the perfect competition within Amplify.

Here's a breakdown of what each step means:

1. Behavior Driving:

1. A competition needs direction. Have hours worked or the number of doors knocked dropped? Then the competition revolves around how many doors can be knocked in an hour, a week or which reps can outwork specific teammates.
2. If we throw a competition out without a specific behavior in mind, then the competition will not yield the results you are seeking.
3. ***SalesRabbit Suggestion: Top performer or top 3 best, gets boring! This only drives the excitement for your best reps, and you will lose the engagement and excitement of your middle and lower-performing reps. Instead, run a competition that drives reps to increase their performance across the board so that everyone can be involved. Set a daily goal for most sets during a specific period of time, or most knocks before lunch, putting everyone on an even playing field of motivation.

2. Energy:

a. There needs to be excitement about the competition, not only from the potential prizes, but from the banter, camaraderie, and grind that comes with it. Rewards are cool, don't get us wrong, but coming together as a team, dripping in blood, sweat, and tears, is where real loyalty and culture is built! Then the reward is the cherry on top.
b. The energy of the participants needs to be constantly watched. If energy dies, the competition dies with it.
    i. Reasons why energy dies:
        1. The competition is too long! Reps get bored of the "same old" very quickly. Keep competitions short and relevant
        2. No variation in the competition. We see it all the time: Most leads in one day, top sets for the week, best at X.
        3. Try mixing it up with a Raffle (Each set = 1 ticket), brackets, individual record competition, or team effort goals. Change things up and watch the energy soar
c. If you want to do a long competition, it needs to be in short spurts. For example, a bracket that takes place over a month period needs to have each Round take place over just Friday and Saturday. And then it happens every weekend for four weeks straight. It's a long competition but broken down into segments.
d. Visibility is crucial! If your reps can't see what other reps or other teams are doing in real time, then the energy dies. Being able to see your competition's numbers will motivate you to win. Also, utilize team chatting through the Feed and Competition Chats to update constantly on the progress of the Competition. Also, utilize this for smack talk, encouragement, and celebrating.

3. Results:

A. Always post the results of the competition.
B. Praise the Winners, but also Praise the Losers.
C. Take opportunities for Individual shoutouts, accolades, and outstanding performances.
D. Offer guidance on how your team can make the experience better and smoother, or reward other behavior that is specific and teachable
E. Ask for feedback from your participants—both good and bad.

4. Rewards:

A. ***SalesRabbit Suggestion: The reward must equal the effort!! Please DO NOT skimp out on your prizes. The better the reward, the more someone will want to participate

B. Just because you think the prize is cool, doesn't mean your team will. Make sure you receive suggestions and insight to fill your Prize Pool so reps will be motivated to compete for the things that are important to them.

C. Similar to the energy paragraph, Variation is key. Do not keep offering the same prize (Unless it has been requested). It's okay to have standard prizes yourpeople can unlock with Coins in Amplify, but the rewards for competitions need to change up.

5. Repeat:

A. Keep this process going! A big mistake is not doing competitions frequently. Our reps need more than just commission to provide motivation. In fact, competition and proper rewards provide such a powerful effect on your team that it may be more important than commission. According to recent research, 71% of sales reps indicate they would work harder if their efforts were better appreciated

B. Remember, Proper rewards increase results, meaning more revenue. That increase in revenue alone, should be enough to cover your reward budget.
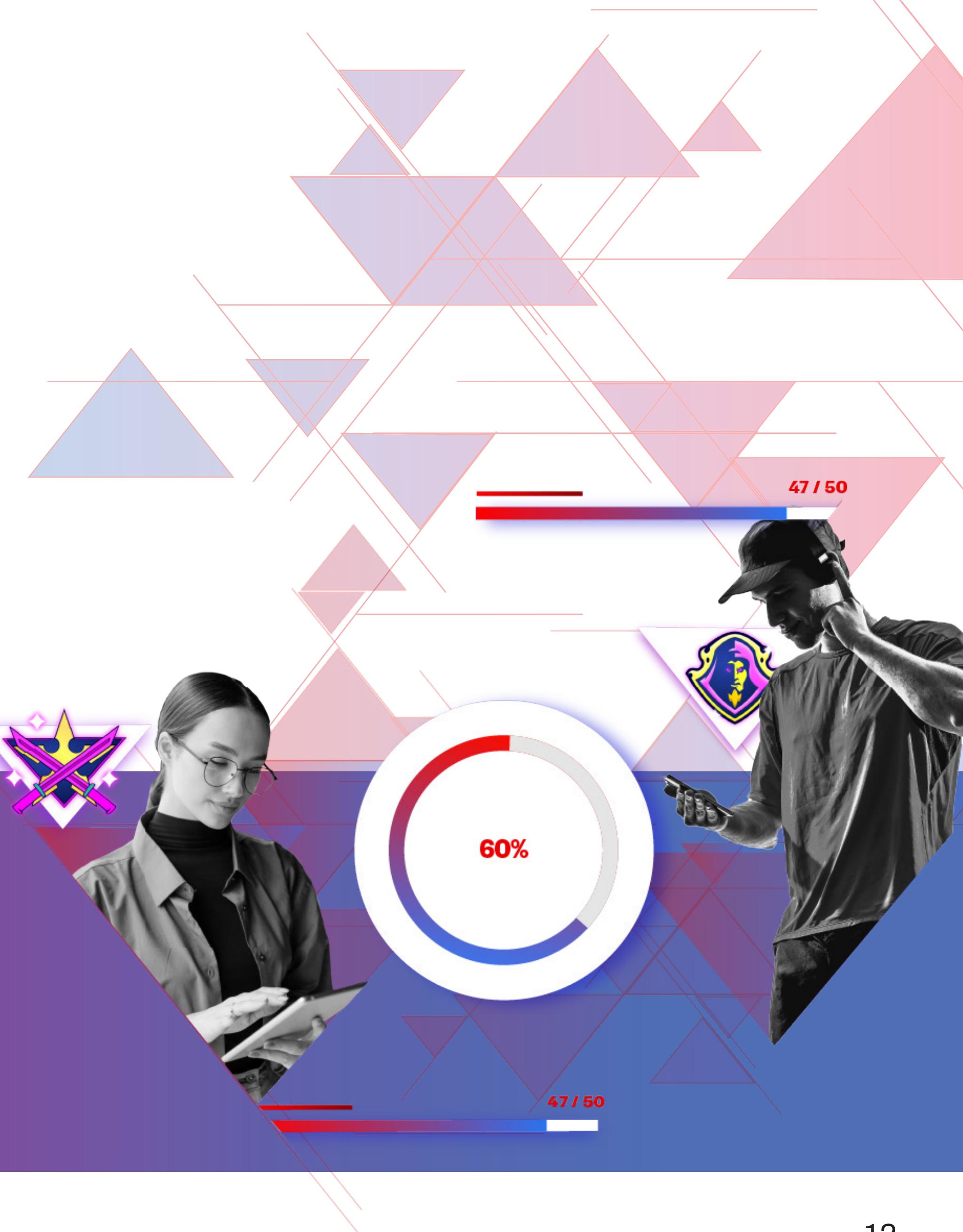
Brilliant Awards, Rewards, and Recognition

What rep doesn't love getting a gift they get to pick out or receiving a personalized shoutout from a teammate? Like we've touched on, rewards can't be something you skimp on because then reps will lose motivation to achieve the award.

1. XP & Awards:

The Achiever player type (43% of outside sales reps) loves earning an award. In Amplify, that comes in the form of Badges & Achievements, as well as XP & Levels. By not utilizing this feature, you're missing out on almost half of your workforce's primary motivator.

QUICK Create a new Achievement based on our predefined templates	**CREATE YOUR OWN** Create a new custom Achievement
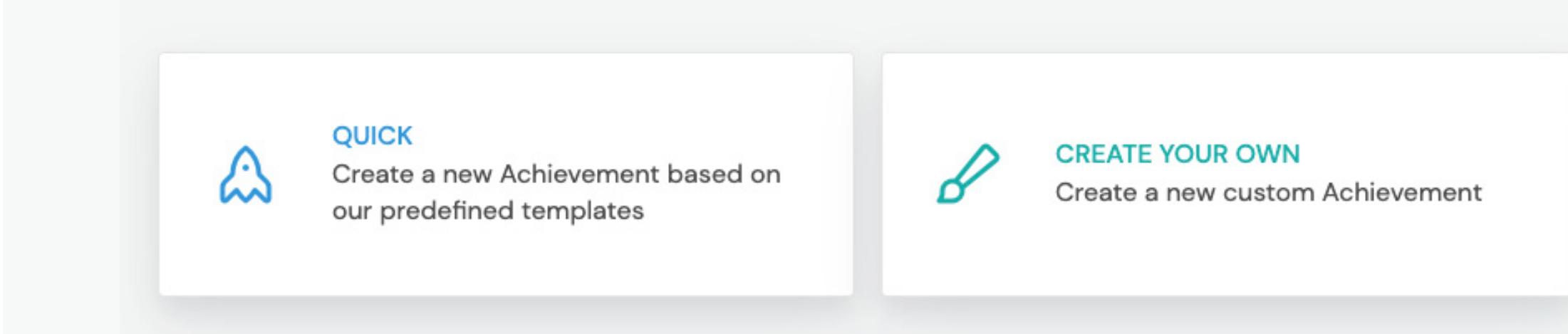
With Achievements, you'll have two options, 'Quick' or 'Create your Own'

- If you do click on QUICK, The achievements are already configured and can be added by just clicking on them. You can always edit it afterward.

- However, if you click on CREATE YOUR OWN, you will be able to customize everything. Start by selecting if you want to create an automatic achievement or scheduled achievement, then the category supported in the selected type.

Achievements offer a dynamic way to motivate your sales team to exceed their targets. They mark important milestones, like achieving a sales budget, breaking a sales record, or closing a significant number of sales in a day. With Amplify, you can create customized achievements that align with your organization's goals. These achievements encompass on-screen announcements, unique soundtracks, badges, and experience points (XP), enhancing team engagement and motivation.
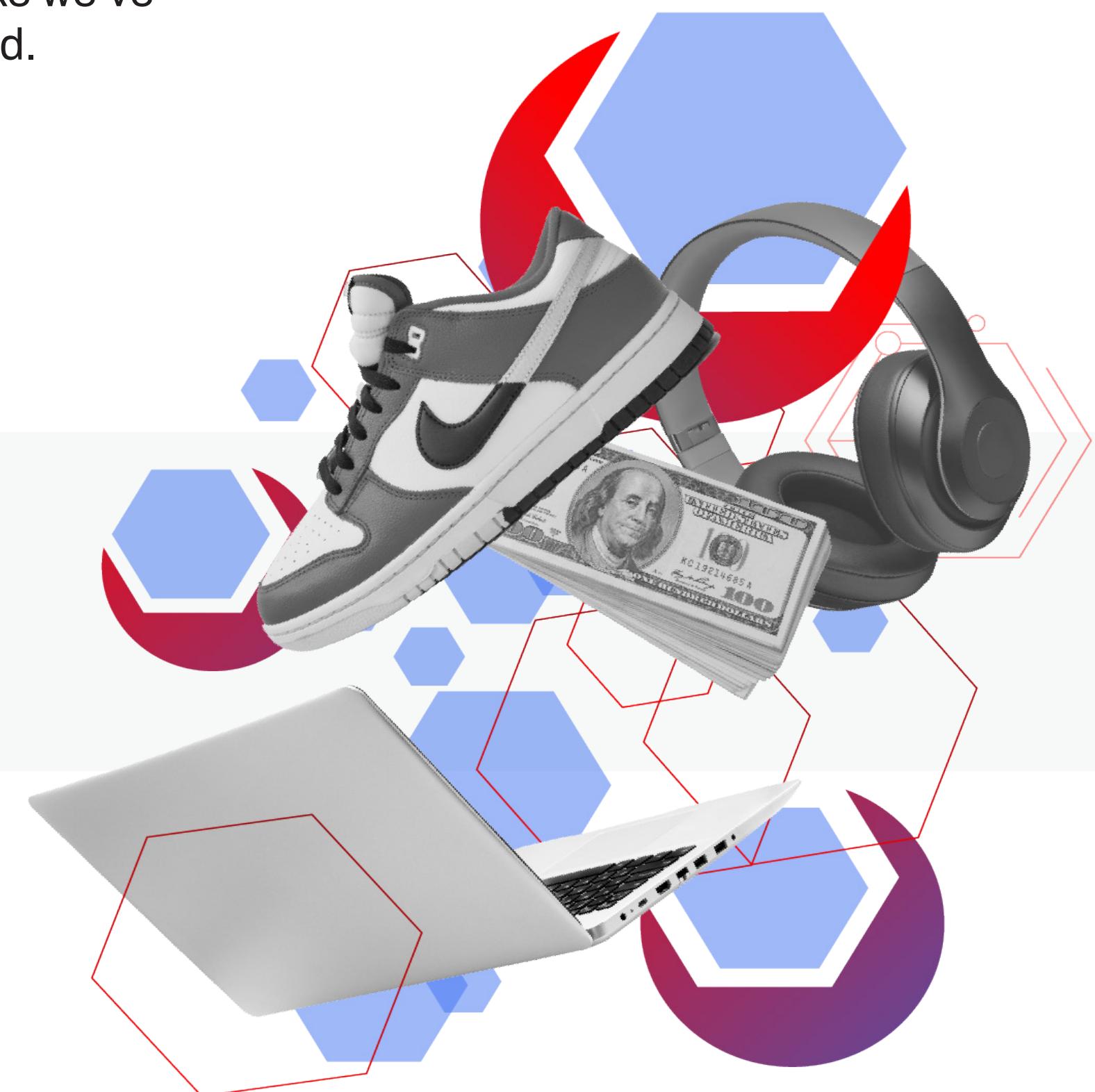
> **When getting started with Badges, you'll have hundreds of existing options to choose from along with the chance to create unique ones for your team! There's no limit to what can be done.**
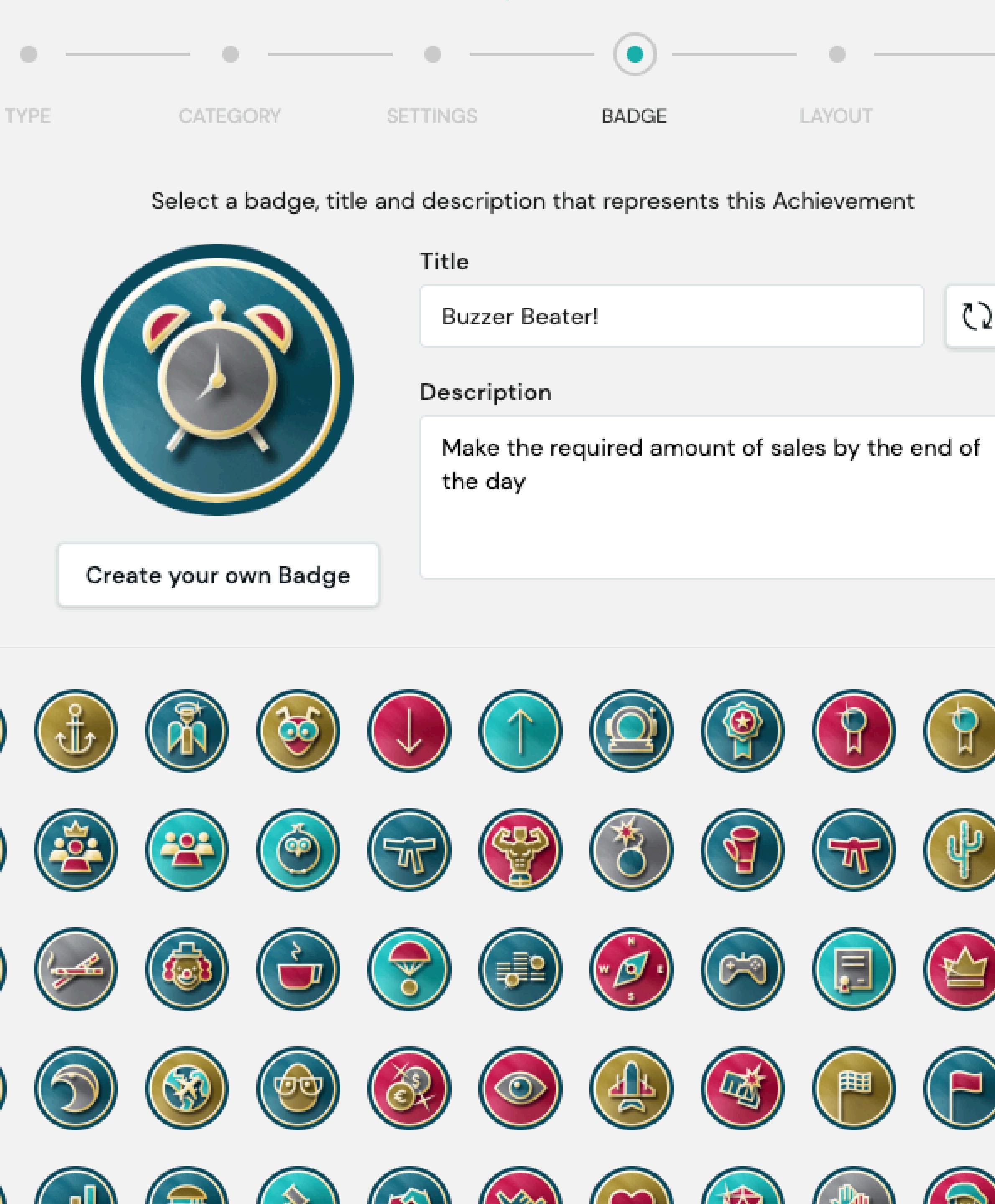
Select a badge, title and description that represents this Achievement

Title

Buzzer Beater!

Description

Make the required amount of sales by the end of the day

Create your own Badge

2. Customized Rewards:

As you know, the Amplify Reward Shop is a feature where users can redeem coins earned through competitions, endorsements, and activities for various rewards. Companies can set up a diverse range of rewards, ensuring there's something for everyone.

Here are some of the things you can do with your rewards store:

- Customize your rewards with coin values, company costs, quantity, and availability.
- Add dropdowns or text fields to collect additional information from users during reward redemption.
- Enable email notifications for reward requests to keep admins informed.
- Feature specific rewards to highlight them in the Reward Shop.
- Set time-limited offers or limit the quantity available for exclusive rewards.

To make sure you're offering prizes your team actually wants, doing simple things like posting a poll, an anonymous survey, or just plain asking reps what they like is going to save managers a lot of headache from the guessing game.

3. Constant Recognition:

Each Amplify account is given the ability to create feeds. Now you'll have an organized and efficient way to communicate with your team and also recognize them for their successes along the way. Recognize for any of the following:

- Battles
- Achievements
- Endorsements
- Birthdays
- New Employee Announcements
- Journey Achievements
- Metrics

You can never post too much! And having a success or battle win is going to be something your reps love to see posted everywhere.

12 Months of Gamification

Plan and implement a year-round gamification strategy to maintain engagement and motivation.

Objective: To enhance the engagement, motivation, and performance of field sales teams using the SalesRabbit Amplify platform.

Key metrics to look out for:

• Sales performance increase
• Reduction in rep churn
• Achievement of individual and team goals
• Engagement and activity levels
• Data-driven insights and coaching outcomes

Monthly Themes and Activities Template:

Need ideas for how to get an annual gamification strategy in place? Here is a recommended plan you can start implementing today:
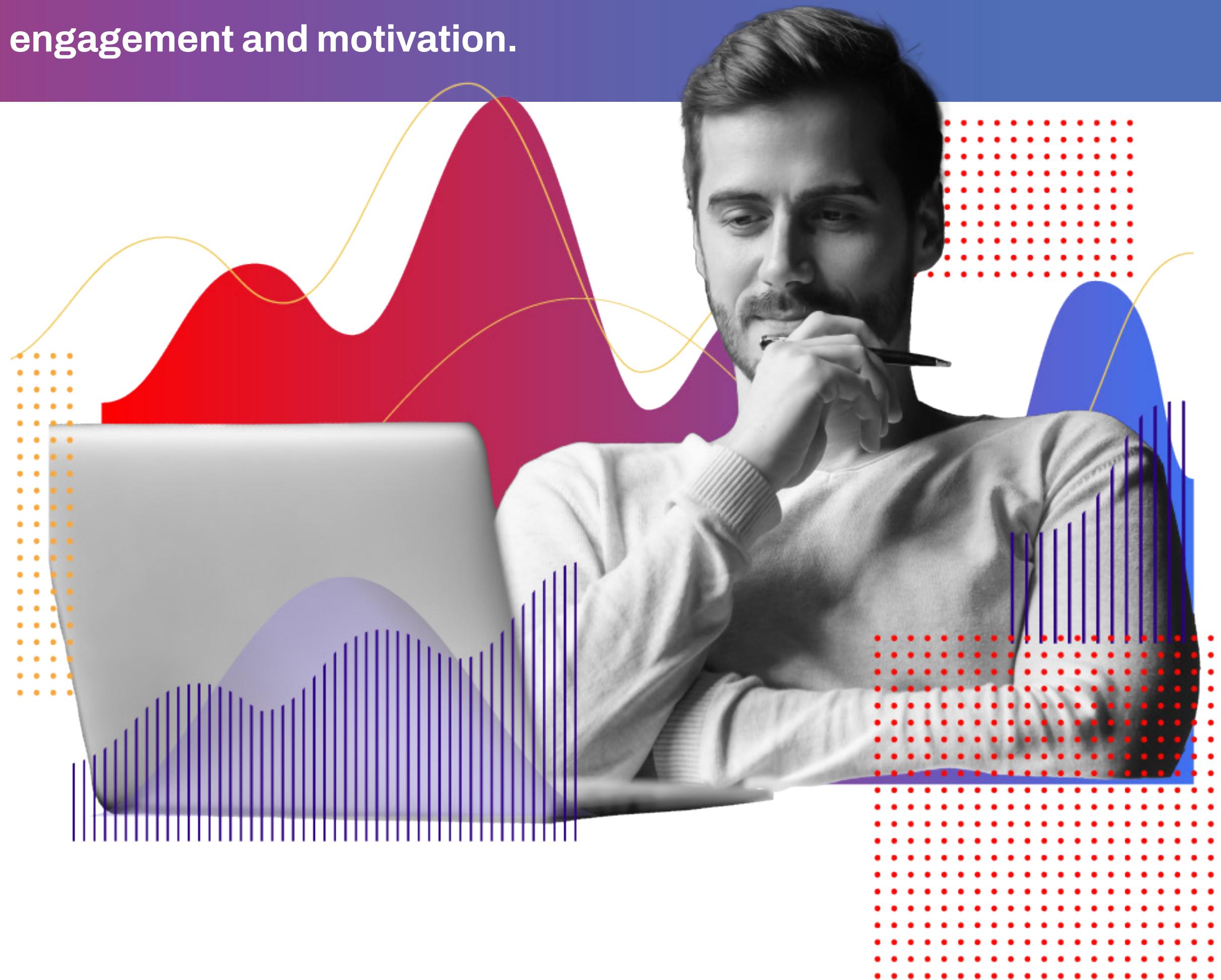
Month #1: Kickoff and Customization
- Introduce Amplify: Provide an overview and training on the platform.
- Set Goals: Align individual and team KPIs for the year.
- Customize Badges: Create personalized badges relevant to your sales objectives.
- XP System Launch: Explain the XP and leveling system.

Month #2: Healthy Rivalries
- Head-to-Head Battles: Start rep vs. rep challenges.
- Battle History Tracking: Encourage reps to view and analyze past battles for improvement.
- Leaderboard Introduction: Display current rankings to foster competition.

Month #3: Competition Blitz
- One-day Blitzes: Organize quick competitions to hit sales metrics.
- Bracket-Style Tournaments: Launch a March Madness-style tournament.
- Dice Roll Competitions: Implement timed competitions with bonus rewards.

Month #4: Achievement Focus
- Exclusive Achievements: Highlight new badges and secret achievements.
- Celebrate Milestones: Recognize significant accomplishments publicly.
- Combined Records Goal: Introduce team-based achievement goals.

Month #5: Data-Driven Insights
- Scorecards: Launch personalized performance scorecards.
- Historic Data Review: Assess previous months' performance data.
- Benchmark Adjustments: Update benchmarks based on individual performance.

Month #6: Virtual Coaching
- Training Sessions: Conduct online training sessions and provide self-serve guides.
- Quick Sessions: Implement brief one-on-one coaching meetings.
- Access Regulations: Ensure privacy and control over coaching materials.

Month #7: Rewards and Recognition
- Rewards Store: Open the digital and physical rewards store.
- Customizable Prizes: Introduce tailored rewards for top performers.
- Coin Earning System: Explain and track the digital coin-earning process.

Month #8: XP and Levels
- XP Integration: Tie XP to daily tasks and company metrics.
- Prestige Options: Allow top performers to reset and start with a prestige marker.
- Themed Levels: Introduce levels modeled after popular video games.

Month #9: Advanced Competitions
- Gift Swap: Implement turn-based competitions with a time limit.
- Wheel of Fortune: Introduce luck-based competitions for diverse engagement.
- Team Scoreboard: Display team rankings based on earned XP.

Of course, it depends on when your team starts implementing Amplify, but by following this year-round gamification strategy template, field sales teams will remain motivated, engaged, and aligned with company goals, ultimately driving better performance and reducing rep churn.

Month #10: Analytics and Reporting
• Data Dashboards: Customize and display team performance dashboards.
• TV Displays: Add visual displays around the office to highlight achievements.
• Social Feed: Use the social feed for public celebrations and transparency.

Month #11: Player Type Engagement
• Bartle Player Types: Have reps take the player type test.
• Targeted Engagement: Customize activities based on player types
  (Killer, Achiever, Explorer, Socializer).
• Feedback Sessions: Conduct feedback sessions to refine strategies.

Month #12: Year-End Review and Celebration
• Performance Review: Analyze overall performance and set preliminary goals for the next year.
• Top Performer Awards: Recognize and reward the top performers of the year.
• Celebrate Success: Organize a year-end celebration event.

Ongoing activities to do:
• Weekly Battles: Maintain a schedule of weekly head-to-head challenges.
• Monthly Leaderboards: Update and display leaderboards regularly.
• Continuous Coaching: Provide ongoing coaching and feedback based on data insights.
• Engagement Tracking: Monitor engagement levels and adjust strategies as needed.

Tools and features to utilize:
• Amplify Software: Central platform for managing all gamification activities.
• Customizable Competitions: Tailored to fit the needs and size of the team.
• Virtual Coaching Modules: Accessible training and coaching resources.
• Rewards Store: Diverse and customizable reward options to motivate reps.
• Analytics Dashboards: Real-time data and performance tracking.

> # "This is stuff I was manually doing for 3 years..."
>
> —Braxton Loewen, Soco Solar

Customer success story

A big user of SalesRabbit, Braxton Loewen, a Sales Operations Manager, has found great success at his company, Soco Solar using SalesRabbit + Amplify.

The Soco Solar team has been using the Amplify software since April 2024. They have dozens of users within the Amplify portal using competitions, achievements, dashboards, and other included features. Since implementing their first competition, they saw an overall improvement of 162% across their organization in doors knocked and appointments set. From their first use of Amplify to today, they've knocked over 28,000 doors with a 49% contact conversion rate. This has resulted in Soco Solar going above projected monthly goals for deals closed, and all of their reps hitting their monthly quota. All impressive numbers accomplished by their hard work and facilitated through Amplify.

According to Braxton, with Amplify, managers are put in the driver's seat. They're getting: true data on their reps, automatic report recaps, and built-in communication tools for their team. Before Amplify, Braxton was manually pulling out all of the stats from SalesRabbit and other communication software into Google Sheets daily. After Amplify, he is handed monthly recaps of rep performance already compiled and ready for review, saving him a reported 3-4 hours of manual input a week.

"That's why I love Amplify so much, it's honest on where you are"

"We wouldn't be where we're at today without SalesRabbit"

After just 2 months, their team has earned 112 achievement badges in our portal. Our badges are designed to motivate reps to knock more doors, make more calls, and hit their KPIs to unlock achievements before their coworkers. They also saw lower-performing reps have a big turnaround in performance and were able to open up an entire new avenue of improvement in their business thanks to a more efficient reporting process.

"As a manager, I'm beyond ecstatic with Amplify"

After learning more about Amplify through a live demo, Soco was even considering restructuring their current messaging software and using the built-in Amplify social feed instead—showing that Amplify not only has the ability to motivate your team but save you money on multiple subscriptions by eliminating tools you don't need anymore.

"Completely game changing"

Start using Amplify to its full potential!

Hopefully, you've found value in how to use SalesRabbit Amplify as well as what is happening with other customers using it. Our mission at SalesRabbit is to Amplify the success of outside sales teams with transformative technology, and we hope to do the same for you and your company. Good luck with Amplify and happy selling!

Customer Resources

If you have additional questions about how to set up your Amplify account, configure a competition, or really anything else, please visit our Help Center portal that's available for all customers. Under the "Amplify" section you'll find all the documentation you need to help your account get up and running.

If you're more of a visual learner, we've got an entire playlist of videos to cover each feature of Amplify and how to implement them.

Or contact your CSM or our support team to get more help at:
+1 (801) 418-9009
support@salesrabbit.com

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