

Sales Playbook



This playbook is designed for you, our valued partner. As a representative of Capability, you will be acting as a voice, delivering our products and services to potential clients and partners, while upholding our standards and values.

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Who We Are



Introduction

Purpose of the Sales Playbook

Welcome to the Capability sales playbook! This guide is designed to provide you with essential product knowledge and clear steps for understanding who Capability is and how to navigate the sales process with each customer type. It helps standardize our approach, ensuring consistency and driving successful outcomes. By following this playbook, you'll be on the path to achieving success, but we are always improving and welcome your feedback.

Key Objectives

Our goal in providing you with this playbook is to make it easier for you to understand and represent us without the hassle of figuring it out on your own. This playbook is a tool to support you while selling to potential customers, ensuring we're aligned in delivering the best experience for both you and the customer. Our main objectives are to help grow your network, increase revenue, and achieve long-term success together – we're here to support your success every step of the way.



Mission and Vision



Mission

We are the answer to training and work management.



Vision

Empower organizations with innovative solutions and expert-driven training to enhance culture, safety, and sustainability.

Values and Culture

At Capability, we deeply value integrity, quality and meaningful connections in everything we do. We believe in the power of real human interactions, not just transactions. Every person we engage with is not just a potential sale—they're a human being with unique needs.

We're not just providing services and products; we're saving lives and livelihoods. By upholding these values, we ensure that every step is driven by empathy, integrity and a commitment to creating a positive impact.





Key Products and Services

Video-based training

Industry-leading video-based training courses across multiple topics, industries and subjects, designed to provide real-world, practical learning experiences.

CAPABILITY SOFTWARE

Comprehensive training and work management Software as a Service (SaaS) system that integrates all aspects of training, environmental health and safety, employee management and operations under one unified platform.



Training Brands:



safetyinstruct.com



hrinstruct.com



leaderinstruct.com

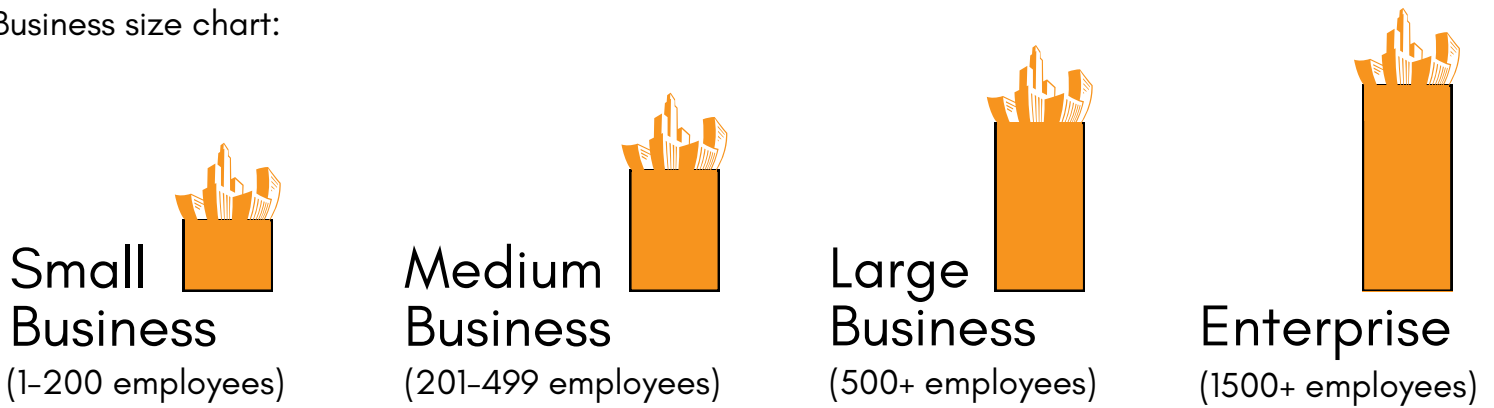
Sales Techniques and Best Practices



Target Audience

Our target audience is diverse, including businesses of all sizes and various industries. Each business has its own unique pain points and needs, with several examples provided at the end of this playbook. Our objective is to guide you in helping prospective clients overcome their challenges.

Business size chart:



Sales Stages

(Timeline varies per business)



*These stages can have multiple meetings to review customer needs and typically increase based on organizational size.



Cold Outreach

Cold outreach can be an intimidating process for many salespeople, but it is also one of the most effective methods for generating new business if completed properly. As a representative of Capability, you're not just reaching out to sell a product—you're offering a solution that can transform the way organizations approach training, safety, and operational efficiency.

To make this process more approachable and increase your chances of success, follow these steps:

- **Understanding Your Prospect**

- Before making any outreach, it's important to understand who you are contacting and why. Use the information in the Ideal Customer Profile (located in tools and resources) section of the playbook to guide your outreach. (Size of Business, Pain Points, and Key Decision-Makers)

- **Preparation for Cold Outreach**

- Take a few minutes to research the prospect's business—review their website and recent news. Look for challenges our products and services can address, such as scaling training programs for a rapidly growing company, where video-based training could help.

- **Craft a Personalized Message**

- Ensure you frame the conversation in terms of value to the prospect. Use Capability's value proposition to highlight how you can solve their specific problems.



Lead Qualification

Qualifying a lead is a critical part of our process, and we understand how important it is to feel confident and supported every step of the way. At Capability, we address the common frustrations of unclear processes and miscommunication in partnerships. We ensure that each lead is assigned to a specific partner over at least a 60-day period*, guaranteeing you receive the credit you deserve for every opportunity. Every lead is tracked and recorded with your unique ID number, so there's no confusion between leads or partners.

*Please reference the partner's agreement for more detailed information

To capture your lead, you have three easy options:

Option 1

Simply scan the QR code provided, and it will automatically direct you to our lead capture form. With a step-by-step video guide, you'll be able to submit your lead quickly and easily, ensuring it's added to the system and tracked under your ID.

Option 2

If you prefer, you can email us directly at sales@capability.work with your lead's details: company name, first contact date, your unique ID number, and any extra information that will help us secure your lead for you.

Option 3

You can also book a 30-minute call with us using this link: <https://calendly.com/danielwilder/30min>. Provide your ID number and lead details, and we'll handle the rest.



Relationship Building & Negotiation Strategies

Cold outreach is just the first step in building a lasting relationship. After your initial contact, focus on nurturing the relationship, remember there is a 60-day clause on ownership of a lead with your ID number.

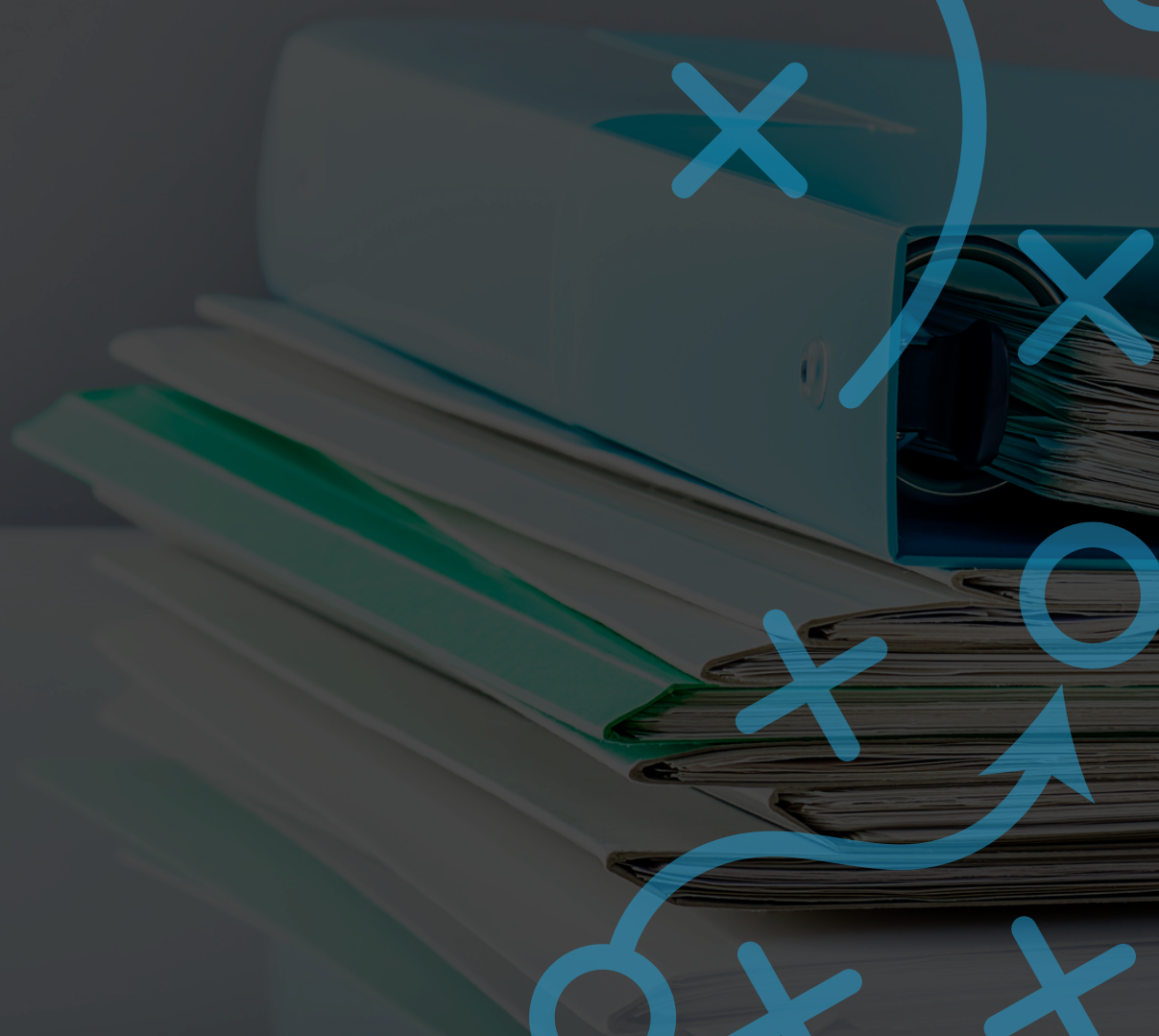
Follow-up regularly

Send follow-up emails or calls that provide value, such as case studies or white papers, that are relevant to their industry or needs. Follow prospects on LinkedIn and engage with their posts to stay top of mind.

Highlight ROI

Understanding their budget is important, but emphasizing the ROI goes beyond just the financial return. It also includes the long-term value of improved employee retention and the prevention of costly mistakes, such as accidents or compliance issues, which can have far-reaching consequences.

Tools and Resources





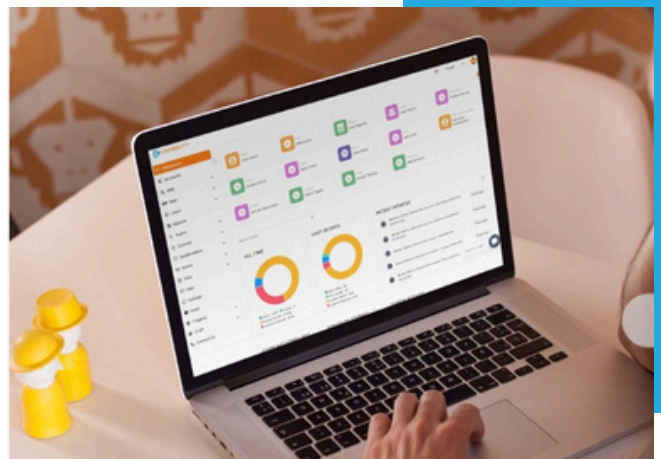
Sales Enablement Tools



At Capability, we are committed to providing you with all the tools you need to keep the relationship with your leads engaged and active. By sharing detailed information about your personal leads, we can reach out to them with industry-specific or need-based marketing materials to effectively present your value proposition.

Additionally, with your resource packet, you have access to white papers and other persuasive materials that you can share with your leads to further strengthen your case and move them closer to a decision.

Content Library:



THANK YOU

