

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:



Customizing Solutions Together

At Capability, our training ventures are shaped by the voices of our clients. Our client feedback and suggestions drive our commitment to creating a customized experience tailored to their organization's or industry's specific needs.

As a growing company, Capability embraces client requests for customized courses that align with daily operations. This approach not only provides a human touch but also enhances knowledge retention among employees.



We offer different levels of customization to meet unique requirements:

- **Full Customization:** This option provides a comprehensive experience, including in-person filming conducted by our experienced staff using professional equipment. Our team collaborates closely with you to review the script and filming process, ensuring that subject matter experts validate the content and meet regulatory requirements.
- **Semi-Customization:** In this option, a portion of the content is produced or provided by the customer, who films specific regulations or processes they wish to cover in depth. We'll integrate your footage alongside our own to create a tailored course focused on your unique requests. This level of customization may be limited by the client's filming efforts but is also a cost-effective way to create a unique curriculum.
- **Course Builder Feature:** Our built-in customization tool allows clients to design their own courses at no additional cost. This feature empowers you with full control over your learning materials, enabling you to create a training experience that best suits your needs.

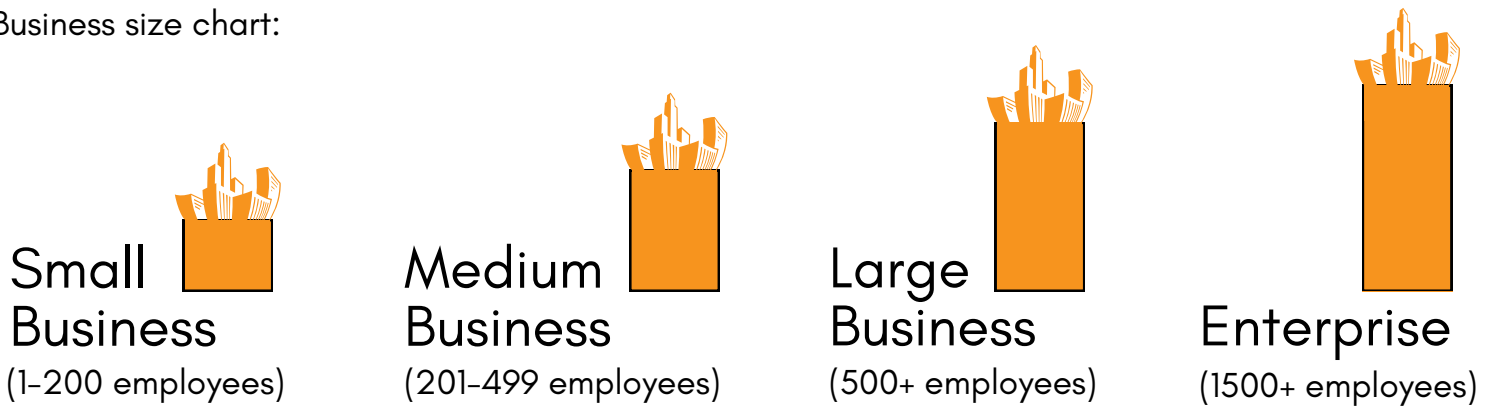
Sales Techniques and Best Practices



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 two easy options:

Option 1

Simply go to the Partner Program Resource Page, scroll to the bottom, and enter all required information in the lead capture form. A step-by-step video guide is available to walk you through the process, ensuring your lead is submitted correctly 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.

Claiming a Lead

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When you come across a potential lead, it's essential to act quickly and strategically. Claiming a lead involves:



Identifying the Lead Source

Determine where the lead originated, from industry type to specific needs, so pain points can be identified and addressed with Capability's value.



Documenting the Lead Information

Make sure the lead is attached to your contact by recording their details and key insights. Leads are tracked through your unique Capability referral code, and if they make a purchase within the 90-day window, they will be automatically linked to your account.



Initial Outreach

Now it's time to reach out! Our sales playbook provides the strategies, techniques, and value-driven messaging needed to engage prospects effectively. Good luck!

What to Do Once You Have a Lead

Finding and approaching a lead is crucial, but closing the deal and building a strong relationship is even more important.

- Finding and approaching a lead is just the beginning—closing the deal and fostering a real connection is where the true value lies. As a partner, your presence and engagement makes all the difference. Capability is constantly growing and evolving, and there will be moments where your direct involvement can strengthen relationships, increasing both your footprint and revenue. While we're always here to support and step in, the personal connection you provide is key to establishing trust and long-term commitment. By being that bridge, you ensure the lead sees real value, making it easier to nurture, convert, and retain them.





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.

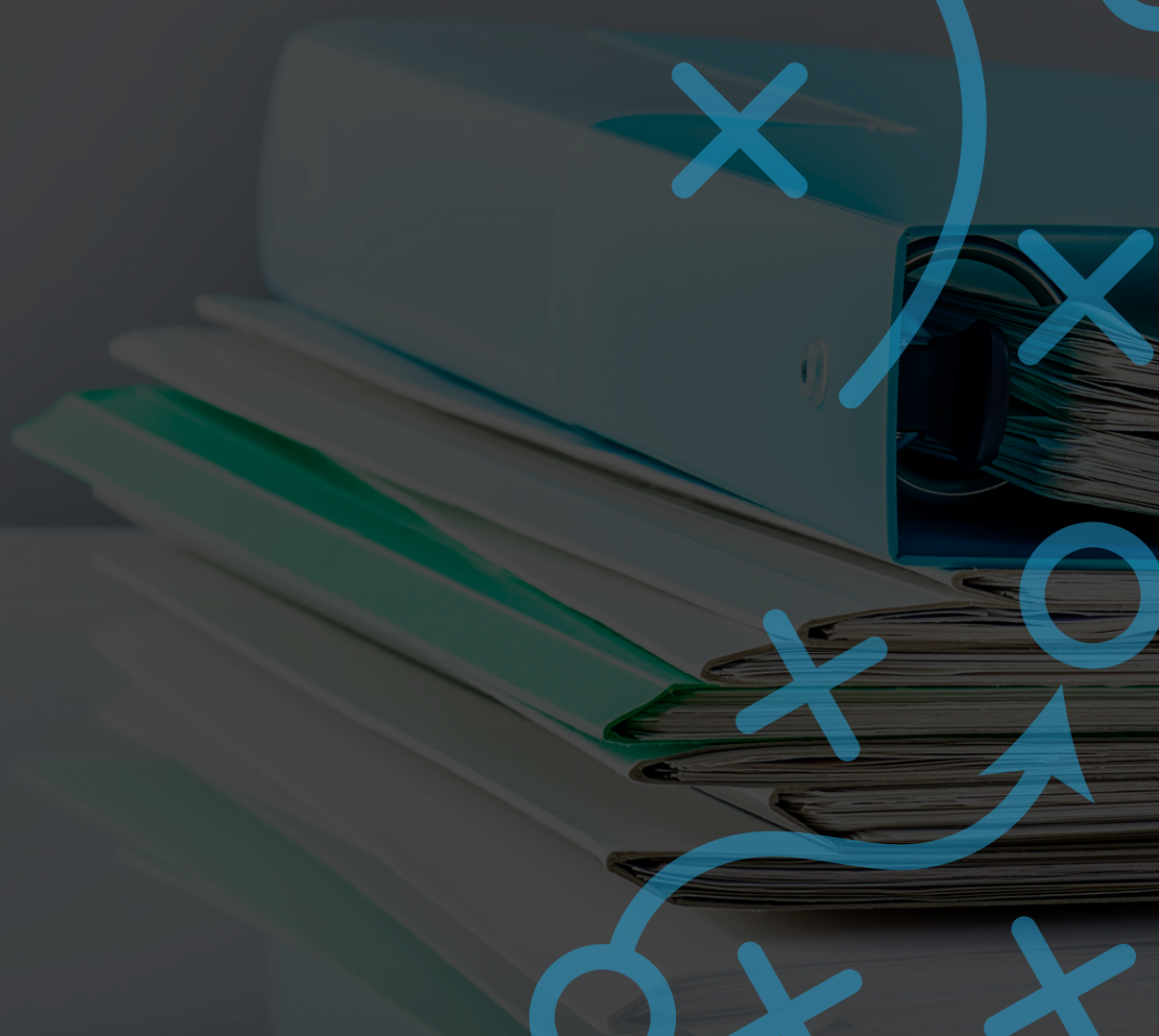
Follow-up regularly

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





Real Connection and Communication at Capability

At Capability, we believe that real connection and communication are essential. Our customer support goes above and beyond, evolving alongside our clients' needs and providing the support our partners require. This means you'll receive in-house support from knowledgeable professionals rather than automated responses or AI bots.



Customer Support Availability

Our customer support team is available live from **8:30 AM to 5:00 PM Eastern American Time.**

Even across time zones, clients and partners can always reach us. Our 24-hour response system functions like a support ticket, ensuring all inquiries are tracked, prioritized, and resolved within one business day.

Our Support Team

Our dedicated support team is here to assist you every step of the way. From seamless integration and software adjustments to course building and troubleshooting, we ensure that you have the guidance you need to navigate any challenges. We take pride in providing personalized assistance tailored to your specific needs, ensuring you can maximize the benefits of our platform without any hurdles.



Quick Communication for Partners

As partners of Capability, your support helps us address local requests or questions that we may not be able to handle immediately. But what if you need quick communication?

Don't worry! We provide a seamless Telegram group and Whatsapp, in addition to e-mail and phone for you to access. This allows you to communicate and receive crucial information dedicated to Capability partners.





Sales Enablement Tools

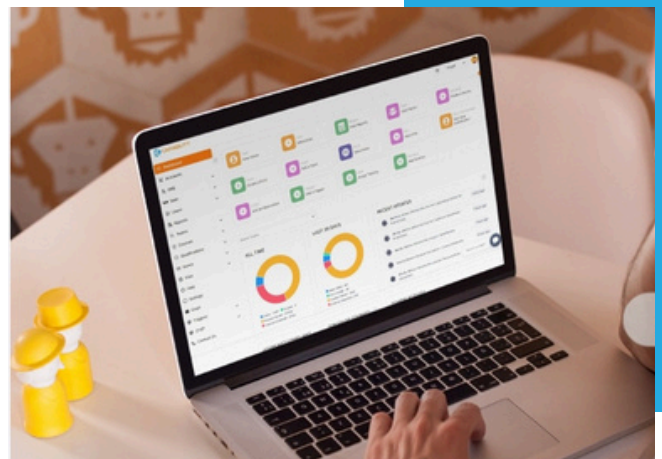


At Capability, we are committed to providing you with all the tools you need to keep the relationship with your leads engaged and active. By sharing detailed information about your personal leads, we can reach out to them with industry-specific or need-based marketing materials to effectively present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

- Pricing Sheet
- Objection Handling handout
- Competitor Comparison Handout
- Small, Medium, and Large/Enterprise Business Profile Handouts
- Capability Course Catalog
- Marketing Banners
- Video Examples



All content found at <https://news.capability.work/partner-program-resources/>

THANK YOU

