

# How Playbook Transformed Its Sales Training and Onboarding Process with Copilot



*Playbook is an all-in-one solution to automate and grow any sports, camps and youth, or fitness organization or facility.*



CHALLENGES	GOALS
Playbook was growing quickly, with many new sales team members onboarding on an ongoing basis. Training was time-consuming and resource taxing.	Training new sales reps at scale.
Feedback and coaching was traditionally shared out of context.	Improved learning and sales performance through contextualized feedback within call recordings.

—I now have time to do so much more in the sales process—pipeline reviews, call coaching, and better performance reviews. Copilot has helped me with all of it.

Sal Grasso  
Director of Sports Partnerships

# How Playbook Speeds Coaching with Copilot

## Easy training and onboarding

Copilot has made it much easier for Playbook to train and onboard new reps. All calls are recorded through Copilot—the good, the bad, and the ugly. Sales leadership reviews calls and provides notes for the newest reps to improve.

## Real-time coaching

With Copilot, Playbook is able to provide coaching just after reps complete calls. Reps will share positive experiences with management, add them to their CRM, and share via Slack. Sales leadership is able to review calls to get a better understanding of the prospect's organization, gauge interest, and see a realistic picture of the next quarter's pipeline.

## Onboarding and training time cut in half

One of the main benefits for Playbook is that sales leadership doesn't have to be hands-on during the BDA onboarding process. BDAs now learn by listening to calls, watching demos, and reviewing transcripts independently. Previously spending four to five days to onboard new reps, Playbook now spends one to two days to onboard new BDAs.

