



SALES PLAYBOOK

WHAT IT IS AND WHY STRUCTURE MATTERS

A sales playbook is a practical, day-to-day guide that brings a company's sales knowledge into one place. It helps companies organize tribal knowledge, identify the right prospects, communicate value consistently, run stronger conversations, and move opportunities through a repeatable process. It is meant to be used before, during, and after sales activity, not treated as a static policy manual.

SUGGESTED BLOCKS THAT CREATE ONE PRACTICAL SALES SYSTEM

01

SALES STRATEGY

WHY IT'S INCLUDED

Creates a shared story about what the company offers, why customers should care, and how the business should be positioned in the market.

SUGGESTED USUAL TOPICS

- ◆ Company overview
- ◆ Value proposition
- ◆ Points of differentiation
- ◆ Elevator pitch
- ◆ Industry overview
- ◆ Known competition
- ◆ Competitive positioning
- ◆ Objection handling

02

IDEAL CUSTOMER PROFILES

WHY IT'S INCLUDED

Focuses the team on the accounts and people most likely to buy, then turns that focus into practical qualification, discovery, and messaging guidance.

SUGGESTED USUAL TOPICS

- ◆ Profile criteria
- ◆ Who not to target
- ◆ Buyer personas
- ◆ Pains and challenges
- ◆ Aspirational goals
- ◆ Qualifying criteria
- ◆ Hot-lead signals
- ◆ Discovery questions
- ◆ Email and LinkedIn messages

03

SALES PROCESS

WHY IT'S INCLUDED

Defines how opportunities should advance, what good execution looks like, and how the team will measure and improve performance.

SUGGESTED USUAL TOPICS

- ◆ Sales cycle stages
- ◆ Stage objectives and exit criteria
- ◆ Conversion expectations
- ◆ Key sales metrics
- ◆ Tools, templates and resources

ABOUT THIS SAMPLE

This one-pager reflects the structure of a **regular playbook** and suggested usual topics. **Lorem ipsum** in the sample is placeholder copy only and will be replaced with company-specific content. Branding, colors, imagery and overall visuals can all be customized to the organization and its sales motion and context.

PRACTICAL. REPEATABLE. CUSTOMIZABLE.

Content, structure, general branding, and visuals are tailored to the organization.



SALES **PLAYBOOK**

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USING THE SALES PLAYBOOK

Packed with proven strategies, valuable insights, and actionable tips, this playbook is designed to equip sales representatives with the tools they need to thrive in their daily interactions with prospects and customers.

From handling objections with finesse to tailoring pitches to specific buyer personas, this comprehensive resource will empower the reps to build strong relationships, drive results, and achieve sales greatness. Let them embark on this exciting journey and elevate their sales performance to new heights!

Sales playbooks lay the foundation for repeatable, scalable sales:

Standardized Approach: Sales reps can refer to the playbook to ensure consistency in their interactions with prospects and customers. They follow the guidelines to deliver a unified message and align their sales strategy with the company's vision. For example, when introducing a new product or service, the playbook provides a script with key talking points to convey the value proposition accurately.

Sales Process Guidance: In their daily workflow, sales reps can rely on the playbook to navigate different stages of the sales process. From initial outreach to closing the deal, the playbook outlines the best practices for each stage. For example, during the discovery phase, the playbook offers a set of well-crafted questions to better understand the prospect's needs and pain points.

Buyer Persona and Industry Insights: Sales reps can leverage the playbook's buyer personas and industry overviews to tailor their sales approach to specific customers. Armed with this knowledge, they can have more meaningful conversations that resonate with prospects' unique challenges and goals.

Competitor Analysis: The playbook may include competitive intelligence, helping sales reps understand the strengths and weaknesses of competitors. By referencing this information, reps can position the company's offerings more effectively, highlighting key differentiators.



SALES STRATEGY

Company Overview

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Value Proposition & Points of Differentiation

Key Value Proposition

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Points of Differentiation

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Elevator Pitch

Elevator Pitch 1

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Elevator Pitch 2

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Elevator Pitch 3

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Industry Overview

Current Environment:

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Future Prospects:

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Where to Focus:

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How to Position Ourselves to Win:

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- **Lorem ipsum:** dolor sit amet, consectetur adipiscing elit. Donec tincidunt iaculis maximus. Vestibulum ligula urna, laoreet nec nibh a, mollis placerat.

Known Competition

Competitor 1

Company Overview: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec tincidunt iaculis maximus.

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Competitor 2

Company Overview: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec tincidunt iaculis maximus.

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Competitor 3

Company Overview: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec tincidunt iaculis maximus.

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Competitive Positioning

Direct Competitors

Company Type (e.g., Company, Company):

- **Where We Win:** Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec tincidunt iaculis maximus.
- **Where We Lose:** Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec tincidunt iaculis maximus.
- **Where We Compete:** Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec tincidunt iaculis maximus. Vestibulum ligula urna, laoreet nec nibh a, mollis placerat justo.

Company Type (e.g., Company, Company):

- **Where We Win:** Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec tincidunt iaculis maximus. Vestibulum ligula urna.
- **Where We Lose:** Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec tincidunt iaculis maximus. Vestibulum ligula urna.
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Indirect Competitors:

Company Type (e.g., Company, Company):

- **Where We Win:** Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec tincidunt iaculis maximus. Vestibulum ligula urna, laoreet nec nibh a, mollis placerat justo.
- **Where We Lose:** Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec tincidunt iaculis maximus. Vestibulum ligula urna, laoreet nec nibh a, mollis placerat justo.
- **Where We Compete:** Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec tincidunt iaculis maximus. Vestibulum ligula urna, laoreet nec nibh a, mollis placerat justo.



Handling Objections

Objection 1:

- **Objector's Concern:** "Lorem ipsum dolor sit amet, consectetur adipiscing elit."
- **Response:** "Donec tincidunt iaculis maximus. Vestibulum ligula urna, laoreet nec nibh a, mollis placerat justo. Ut volutpat erat arcu, vel sollicitudin lectus aliquam sit amet. Nullam fermentum urna libero, sit amet maximus enim maximus vitae. Cras consequat mauris vitae mollis rutrum."

Objection 2:

- **Objector's Concern:** "Lorem ipsum dolor sit amet, consectetur adipiscing elit."
- **Response:** "Donec tincidunt iaculis maximus. Vestibulum ligula urna, laoreet nec nibh a, mollis placerat justo. Ut volutpat erat arcu, vel sollicitudin lectus aliquam sit amet. Nullam fermentum urna libero, sit amet maximus enim maximus vitae. Cras consequat mauris vitae mollis rutrum."

Objection 3:

- **Objector's Concern:** "Lorem ipsum dolor sit amet, consectetur adipiscing elit."
- **Response:** "Donec tincidunt iaculis maximus. Vestibulum ligula urna, laoreet nec nibh a, mollis placerat justo. Ut volutpat erat arcu, vel sollicitudin lectus aliquam sit amet. Nullam fermentum urna libero, sit amet maximus enim maximus vitae. Cras consequat mauris vitae mollis rutrum."

Objection 4:

- **Objector's Concern:** "Lorem ipsum dolor sit amet, consectetur adipiscing elit."
- **Response:** "Donec tincidunt iaculis maximus. Vestibulum ligula urna, laoreet nec nibh a, mollis placerat justo. Ut volutpat erat arcu, vel sollicitudin lectus aliquam sit amet. Nullam fermentum urna libero, sit amet maximus enim maximus vitae. Cras consequat mauris vitae mollis rutrum."

Objection 5:

- **Objector's Concern:** "Lorem ipsum dolor sit amet, consectetur adipiscing elit."
- **Response:** "Donec tincidunt iaculis maximus. Vestibulum ligula urna, laoreet nec nibh a, mollis placerat justo. Ut volutpat erat arcu, vel sollicitudin lectus aliquam sit amet. Nullam fermentum urna libero, sit amet maximus enim maximus vitae. Cras consequat mauris vitae mollis rutrum."





IDEAL CUSTOMER PROFILES

ICP 1: Ideal Customer Profile 1

Industry: Lorem ipsum dolor sit.

Revenue: Amet consectetur adipiscing.

Geography: Elit donec tincidunt.

Vertical:

- Lorem ipsum
- Dolor sit
- Amet consectetur

Specialties:

- Lorem ipsum
- Dolor sit
- Amet consectetur

Psychographics: Vestibulum ligula urna laoreet.

Geographics: Nec nibh a mollis.

Demographics: Placerat justo curabitur.

Additional Characteristics:

- Aliquam erat
- Volutpat nulla





Characteristics Not to Target:

- Eget nunc
- Rutrum tempor
- Suspendisse potenti

Buyer Personas

Buyer Persona 1:

- Name:
- Job Title:
- Responsibilities:
- Involvement in Buying Process:

Buyer Persona 2:

- Name:
- Job Title:
- Responsibilities:
- Involvement in Buying Process:



Client Pains, Challenges & Aspirational Goals

Issues We Solve:

1. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec tincidunt iaculis maximus. Vestibulum ligula urna, laoreet nec nibh a, mollis placerat justo. Ut volutpat erat arcu, vel sollicitudin lectus aliquam sit amet. Nullam fermentum urna libero, sit amet maximus enim maximus vitae.
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Possibilities We Unlock:

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Impact We Make:

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Aspirational Goals:

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Qualifying Criteria & Hot Leads Checklist

Qualifying Criteria

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3. Nullam fermentum urna libero, sit amet maximus enim maximus vitae.
4. Cras consequat mauris vitae mollis rutrum. Suspendisse a urna vel neque aliquam pellentesque eu eget neque.
5. Vivamus condimentum erat nec ornare convallis. Morbi est neque, fringilla vel nulla ut, volutpat rhoncus mi.

Hot Leads Checklist

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- Nullam fermentum urna libero, sit amet maximus enim maximus vitae.
- Cras consequat mauris vitae mollis rutrum. Suspendisse a urna vel neque aliquam pellentesque eu eget neque.
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Discovery Questions

1. **Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec tincidunt iaculis maximus?**
 1. Follow Up:
 2. Follow Up:
2. **Vestibulum ligula urna, laoreet nec nibh a, mollis placerat justo. Ut volutpat erat arcu, vel sollicitudin lectus aliquam sit amet?**
 1. Follow Up:
 2. Follow Up:
3. **Nullam fermentum urna libero, sit amet maximus enim maximus vitae?**
 1. Follow Up:
 2. Follow Up:
4. **Cras consequat mauris vitae mollis rutrum. Suspendisse a urna vel neque aliquam pellentesque eu eget neque?**
 1. Follow Up:
 2. Follow Up:
5. **Vivamus condimentum erat nec ornare convallis. Morbi est neque, fringilla vel nulla ut, volutpat rhoncus mi?**
 1. Follow Up:
 2. Follow Up:





Email Messages

Cold Email 1:

Subject:

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Cold Email 2:

Subject:

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Cold Email 3:

Subject:

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LinkedIn Messages

Message 1: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec tincidunt iaculis maximus. Vestibulum ligula urna, laoreet nec nibh a, mollis placerat justo. Ut volutpat erat arcu, vel sollicitudin lectus aliquam sit amet. Nullam fermentum urna libero, sit amet maximus enim maximus vitae.

Message 2: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec tincidunt iaculis maximus. Vestibulum ligula urna, laoreet nec nibh a, mollis placerat justo. Ut volutpat erat arcu, vel sollicitudin lectus aliquam sit amet. Nullam fermentum urna libero, sit amet maximus enim maximus vitae.

Message 3: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec tincidunt iaculis maximus. Vestibulum ligula urna, laoreet nec nibh a, mollis placerat justo. Ut volutpat erat arcu, vel sollicitudin lectus aliquam sit amet. Nullam fermentum urna libero, sit amet maximus enim maximus vitae.



ICP 2: Ideal Customer Profile 2

Industry: Lorem ipsum dolor sit.

Revenue: Amet consectetur adipiscing.

Geography: Elit donec tincidunt.

Vertical:

- Lorem ipsum
- Dolor sit
- Amet consectetur

Specialties:

- Lorem ipsum
- Dolor sit
- Amet consectetur

Psychographics: Vestibulum ligula urna laoreet.

Geographics: Nec nibh a mollis.

Demographics: Placerat justo curabitur.

Additional Characteristics:

- Aliquam erat
- Volutpat nulla



Characteristics Not to Target:

- Eget nunc
- Rutrum tempor
- Suspendisse potenti

Buyer Personas

Buyer Persona 1:

- Name:
- Job Title:
- Responsibilities:
- Involvement in Buying Process:

Buyer Persona 2:

- Name:
- Job Title:
- Responsibilities:
- Involvement in Buying Process:



Client Pains, Challenges & Aspirational Goals

Issues We Solve:

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Possibilities We Unlock:

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Impact We Make:

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Aspirational Goals:

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Qualifying Criteria & Hot Leads Checklist

Qualifying Criteria

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Hot Leads Checklist

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Discovery Questions

1. **Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec tincidunt iaculis maximus?**
 1. Follow Up:
 2. Follow Up:
2. **Vestibulum ligula urna, laoreet nec nibh a, mollis placerat justo. Ut volutpat erat arcu, vel sollicitudin lectus aliquam sit amet?**
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 2. Follow Up:





Email Messages

Cold Email 1:

Subject:

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Cold Email 2:

Subject:

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Cold Email 3:

Subject:

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LinkedIn Messages

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ICP 3: Ideal Customer Profile 3

Industry: Lorem ipsum dolor sit.

Revenue: Amet consectetur adipiscing.

Geography: Elit donec tincidunt.

Vertical:

- Lorem ipsum
- Dolor sit
- Amet consectetur

Specialties:

- Lorem ipsum
- Dolor sit
- Amet consectetur

Psychographics: Vestibulum ligula urna laoreet.

Geographics: Nec nibh a mollis.

Demographics: Placerat justo curabitur.

Additional Characteristics:

- Aliquam erat
- Volutpat nulla



Characteristics Not to Target:

- Eget nunc
- Rutrum tempor
- Suspendisse potenti

Buyer Personas

Buyer Persona 1:

- Name:
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- Responsibilities:
- Involvement in Buying Process:

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Qualifying Criteria & Hot Leads Checklist

Qualifying Criteria

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Hot Leads Checklist

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SALES PROCESS

Sales Cycle Stages

Note: These resources are to be customized with your Advisor.

1. Prospecting / Target / Intelligence:

- Generate 20 leads per week.
- Expected conversion rate: 20%.

2. Qualifying / Needs / Best-Fit:

- Convert 20% of leads to qualified prospects.
- This yields 10 qualified prospects per week.

3. Appointment Set / Decision Maker:

- Convert 50% of qualified prospects into appointments.
- This results in 5 appointments per week.

4. Present / High-Value Needs:

- Convert 40% of appointments into presentations.
- This leads to 2 presentations per week.

5. Objection Management:

- Convert 80% of presentations to prospects ready to buy.
- This results in 1.6 prospects ready to buy per week.



6. Close / Agreement for Buying (AFB):

- Convert 63% of prospects ready to buy into closed deals.
- This yields 1 closed deal per week.

7. Follow-Up:

- Convert 90% of closed deals into confirmed sales.
- This results in 0.9 confirmed sales per week.





Key Sales Metrics

Note: These resources are to be customized with your Advisor.

- 1. Sales Cycle Length:** Measure the average time it takes to move a lead from the initial contact stage to a closed deal. This metric helps assess the efficiency of the sales process and identify potential bottlenecks.
- 2. Conversion Rates by Sales Stage:** Track the percentage of leads that successfully transition from one sales stage to the next. This includes conversion rates from prospecting to qualification, appointment setting to presentation, and presentation to closing. Analyzing these rates helps identify areas where leads may drop off or stall in the pipeline.
- 3. Pipeline Velocity:** Calculate the average time it takes for a lead to progress through each sales stage. This metric provides insights into the speed at which deals move through the pipeline and helps identify areas for acceleration.
- 4. Win Rate:** Measure the percentage of qualified opportunities that result in closed deals. A high win rate indicates effective targeting and qualification of leads.
- 5. Sales Velocity:** Determine the rate at which revenue is generated from leads in the sales pipeline. This metric considers deal value and the length of the sales cycle to assess how quickly revenue is realized.
- 6. Sales Funnel Metrics:** Track the number of leads or opportunities at each stage of the sales funnel. Analyzing the funnel's shape and the volume of leads at each stage helps identify potential gaps and areas for improvement.
- 7. Average Deal Size:** Calculate the average monetary value of closed deals. This metric helps assess the typical deal size and can inform pricing and packaging strategies.
- 8. Lead Response Time:** Measure the time it takes for the sales team to respond to leads or inquiries. Faster response times often lead to higher conversion rates.
- 9. Customer Acquisition Cost (CAC):** Calculate the cost associated with acquiring each new customer. This includes marketing, sales, and operational expenses. CAC helps assess the efficiency of customer acquisition efforts.



Sales Resources

Industry Resources

- [Competitor Sales Analysis Checklist](#)

Customer Resources

- [Target Market Analysis Checklist](#)
- [Sample Client Survey](#)

Sales Methodology Resources

- [The Funnel: Goal Achievement Planning](#)
- [Ebook: Improving Your Lead Generation & Qualification Process](#)

Sales Process Resources

- [Virtual Meeting Checklist](#)
- [Sales Plan Checklist](#)
- [Sales Process Example](#)

Social Selling Resources

- [Creating A Winning LinkedIn Profile](#)



