

Sales Playbook Template

Use this playbook to connect the team's target customers, messaging, sales process, repeatable plays, and handoffs. Complete it from approved commercial material and use evidence to support claims about value, competitors, and expected outcomes.

Complete the bracketed fields with approved information for the product, organization, or program being documented. Repeat the named forms where several tasks or subjects need separate records. Remove sections that do not apply and retain links to the material used to complete the document.

Document control	Entry
Document identifier	[Identifier used by your team]
Scope and applicable version	[Product, program, locations, and version covered]
Prepared and maintained by	[Responsible role or team]
Revision and review	[Revision, review date, and approval reference]

Playbook Foundations

Define the offerings, markets, and responsibilities the playbook covers. Keep sales strategy and rules of engagement explicit before describing individual plays.

Field	Complete with
Scope	[Offerings, segments, regions, sales motions, and exclusions]
Strategy	[Target outcomes, positioning, priorities, and approved commercial reference]
Team responsibilities	[Roles, decision rights, territories or ownership rules, and handoffs]
Using the playbook	[How stages, plays, templates, tools, and proof points connect]

Ideal Customer Profile and Personas

Separate account fit from the people involved in a decision. Record observable fit criteria and use source-supported concerns rather than assumptions about a buyer.

Field	Complete with
Account fit	[Attributes, use cases, buying signals, and approved disqualifiers]
Persona	[Role, responsibilities, relevant goals, and problems established by the source]
Buying committee	[Role in the decision, involvement, concerns, and relationship map]
Discovery evidence	[Questions, customer statements, sources, and fit or uncertainty record]

Offering and Value Messaging

Connect product capabilities to the customer's stated problem and support claims with approved evidence. Keep pricing and packaging references current.

Field	Complete with
Offering	[Product or service, relevant capabilities, applicable package, and scope]
Customer problem	[Observed problem, affected workflow, consequence, and discovery evidence]
Value message	[Supported benefit, proof point, applicability, and limitation]
Commercial reference	[Approved pricing or packaging source, proposal material, and change owner]

Sales Process and Qualification

Use the team's actual stage names and qualification framework. Define movement through the process using buyer evidence and the required internal records.

Field	Complete with
Stage	[Name, purpose, entry criteria, exit criteria, and buyer verifier]
Qualification	[Framework element, discovery question, evidence, and unresolved gap]
Required records	[CRM fields, artifacts, approvals, and responsibility]
Review and next step	[Decision, risk, owner, customer commitment, and review point]

Sales Plays

Repeat this play record for a recurring situation at a specific stage. Give the seller a trigger, a sequence of actions, and evidence of the next useful outcome.

Field	Complete with
Play and trigger	[Situation, sales stage, audience, goal, and when the play applies]
Preparation	[Account or discovery information, resources, proof points, and required support]
Actions	[Sequence, conversation prompts, decision points, and linked assets]
Outcome	[Customer response, evidence, next step, CRM update, and handoff]

Repeat this procedure for each supported task or variant. Place the applicable warning before the affected action and record a result that can be checked.

Step	Action	Expected result	Evidence
1	[One action using the exact interface label or approved command]	[Observable state]	[Check or record]
2	[Next action in dependency order]	[Observable state]	[Check or record]
3	[Verification or handover action]	[Completion condition]	[Retained evidence]

Objection Handling

Record the customer's actual concern before choosing a response. Keep the supporting evidence and the question used to confirm the concern visible.

Field	Complete with
Objection	[Customer wording, category, stage, and context]
Clarification	[Question that establishes the concern, its impact, and the decision it affects]
Response	[Approved explanation, evidence, limits, and relevant resource]
Next step	[How to check whether the concern is resolved, record the outcome, or escalate]

Competitive Positioning

Create one battlecard per alternative and keep comparisons traceable to approved evidence. Separate verified information from an item that still needs confirmation.

Field	Complete with
Alternative	[Competitor or alternative, relevant use case, and source date or version]
Comparison	[Customer criterion, supported difference, and authoritative evidence]
Positioning	[Approved message, suitable proof point, and condition where it applies]
Discovery and caution	[Questions to establish fit, uncertainty to verify, and claims not supported by the evidence]

Negotiation Closing and Handoff

Identify the seller's authority and the approvals needed to close. Keep the customer commitments and implementation handoff clear enough for the next team to act.

Field	Complete with
Negotiation rights	[Approved commercial boundaries, discount or concession authority, and approval route]
Paper process	[Customer and internal legal, security, procurement, or finance steps and responsibilities]
Closing evidence	[Agreed scope, approved terms reference, required records, and decision status]
Handoff	[Customer goals, promised scope, stakeholders, risks, next actions, and receiving role]

Tools Metrics and Cadence

Record how the team uses its systems and measures progress. Keep activity, pipeline, and outcome measures distinct and define their data sources.

Field	Complete with
CRM and tools	[System, purpose, access, required fields, and usage procedure reference]
Metric	[Definition, unit, data source, scope, and approved target if one exists]
Operating cadence	[Review, participants, preparation, decisions, and timing if defined]
Data quality and actions	[Check, issue, responsible role, correction, and follow-up record]

Glossary

Define the stage names, terms, and acronyms used by the team. Keep these names consistent in plays, CRM records, reports, and handoff material.

Field	Complete with
Term	[Sales term, stage, framework element, or abbreviation]
Definition	[Meaning and applicability in this playbook]
Reference	[Approved process, commercial source, or system definition]
Usage	[Preferred wording and distinctions that prevent inconsistent interpretation]