



Sales Playbook Template

Your blueprint for growth



Velocity B

>Purpose

In today's tech landscape, growth is not just about acquiring new customers – it's about creating repeatable, scalable, and predictable revenue.

A sales playbook is the key to achieving that. It provides clarity, alignment, and consistency while enabling your revenue team (sales & marketing) to learn, adapt, and succeed faster.

This template serves as a blueprint that outlines what works, how to execute it, and what information you need to create velocity in your sales team.

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1 Company Information

1.1 Company mission and goals

Explanation of who you are, what you do and why you're different

1.2 Company strategy

Explanation of your company's sales & marketing strategy and how it aligns with the overall business strategy

2 Ideal Customer Profile - Company

2.1 ICP Summary

Define industry, company size, tech stack, pain points, budget, buying triggers

2.2 Customer Segmentation

Define your target market - SMB, mid-market, enterprise, vertical focus, geography

2 Ideal Customer Profile - Buyers

2.3 Buyer Personas

What are the roles involved in buying (e.g., CIO, Head of Ops, end user) and what are their goals, objections, and decision making power?

2.4 Buyer Journey

How do buyers become aware of your solution, make the selection and then purchase?

3

Product and Category

3.1 Product Overview

What are the core features and our approach to solving the problem?

3.3 Category

What is the competitor landscape, the incumbent solutions and what is our differentiation?

3.2 Use Cases

What are the real-world examples that showcase results and impact?

3.4 Objection Handling

What are the main objections to this approach and how do you respond?

4 Value Proposition

4.1 Value Proposition

List the tangible benefits (ROI, efficiency, cost reduction) by persona

persona x

persona y

5 Prospecting and Lead Generation

5.1 Targeting Strategy

How do you identify and prioritize leads?

5.3 Inbound

How do you manage lead routing and what is the response SLA and the qualification process?

5.2 Outbound

What is your outbound strategy? Including email templates, call scripts, LinkedIn etc.

5.4 Sales Tools

What tools do you use (CRM, Sales Navigator, intent platforms, etc) and what's the process?

6 Discovery and Qualification

6.1 Qualification

What's your qualification criteria and process? (e.g.: BANT, CHAMP etc)

6.3 Red Flags

What signs are you looking for to determine that the deal is not worth pursuing?

6.2 ICP Discovery

What information do we need to determine that this company is our ICP and what contacts do we need?

6.4 Solution Fit

What are the detailed questions that will uncover needs, pains, and goals, that fit with our solution?

7 Sales Process

7.1 Pipeline Stages

What are the steps in your sales process? - (e.g.: Lead > Discovery > Demo > Proposal > Negotiation > Contract > Close)

7.2 Stage Criteria

How do you qualify a deal to move between each stage?

7.3 Sales Activities

What are the tasks, deliverables and tools used at each stage and who owns the activity (marketing, BDR, AE, legal etc)?

7.4 Forecasting

How does sales estimate probability, forecasting and timelines and report to the business?

8 Prospect Meetings

8.1 Agenda

What is the standard meeting agenda and how will success be measured - for each sales stage?

8.2 Research

What should sales know prior to the meeting about the attendees, the target company and the project?

8.4 Preparation

What are the standard materials, attendees and demo requirements needed and what is the expected process for preparation?

8.5 Follow Up

What are the next steps and the materials needed to continue the conversation?

9 The Demo

9.1 Narrative

What is the purpose of the demo, and what story are we telling?

9.2 Tailoring

How is the demo personalized for specific audiences/use cases and what information or data is needed?

9.3 Preparation

What is the expected process for preparation of the demo environment, sales brief, rehearsal and attendees?

9.4 Objections

What are the common prospect questions and objections and how does the demo address them?

10 The Close

10.1 Pricing

What is the pricing model and strategy including subscription tiers, usage and enterprise pricing?

10.2 Discounting

What is the discount approval process and sign-off limits?

10.3 Negotiation

What tips can you share to handle procurement, legal, or budget push back?

10.4 Closing

What are the contract workflows, internal approval and e-signature processes?

11 Post Sale

11.1 Onboarding

What is the process for transitioning from sales to account management and customer success teams?

11.3 Renewal

How do we manage the renewal process, who is responsible and what do we do to ensure client renews?

11.2 Account Growth

How do we identify and track the up-sell and expansion opportunities for an account as it moves to account management?

11.4 Advocacy

What is the process for converting the customer to an advocate providing references, quotes and a case study?

12 Sales Operations

12.1 Reporting

What are the KPIs and metrics and what data, tools, reports and dashboards are needed to track them?

12.3 Coaching

What is the standard process for deal reviews, win/loss analysis, 1:1's and sales meetings?

12.2 Sales Kit

Where are sales resources including battle cards, messaging decks, proposal templates, the price list, etc?

12.4 Playbook Updates

When does the playbook get updated and who is responsible?

>Let's Get Started

Creating a sales playbook is a commitment, we've listed over 40 items that it should address, some are simple and some are projects in themselves, like creating a sales kit.

But investing the time capturing the knowledge of the company founders, experienced sellers and previous successful sales engagements, codifying this process and being able to hand it to new sales executives, the business development team and external agencies repays itself almost immediately, significantly reducing your time to revenue for these new hires, accelerating your sales velocity.

If this sounds like something you need, but this time investment is tough right now, as you focus on your business, we can help, we have the experience, expertise and tools to review what you have, prioritize your immediate need and quickly build your blueprint for growth.

>Get in touch

For more advice and resources, drop us
an email or visit our website:

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