The

<Your Company>

Sales Playbook

Built on the Louie Bernstein Method

Version 1.0
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How to Use This Playbook

This playbook is a living document. It is not finished the day you receive it, and it should never be finished. It gets updated as your product changes, as your market changes, and as your team learns what works.

Every new hire reads it cover to cover before their first customer call. Every existing rep consults it before going to a manager with a question. Every sales manager uses it for onboarding, coaching, and weekly training.

> **Rule 1**
> Before you ask anyone a sales question, look for the answer here first. If it is not here, find the answer, then add it.

The Louie Bernstein Method

This playbook is built on the Louie Bernstein's Method, which has three layers working together:

Layer 1 — Principles. The non-negotiables of how a Professional Salesperson behaves. Like, Trust, Buy. Be a Trusted Advisor. Sell with integrity. Deliver value every touch. Never mislead. This comes first because skills without character do not scale.

Layer 2 — Process. A defined, repeatable pipeline with stages, exit criteria, and cadence. Nobody wonders what comes next.

Layer 3 — Qualification. Every active opportunity is scored against eight elements: Metrics, Economic Buyer, Decision Criteria, Decision Process, Paper Process, Identify Pain, Champion, Competition. If a deal cannot be scored on all eight, it is not qualified.

The Professional Salesperson

Everything in this playbook assumes you aim to be a Professional Salesperson. A Professional Salesperson delivers truthful, valuable information in a prepared and structured manner so that someone who has a real need for the product can make an informed decision. No trickery. No deception. No pressure tactics that leave the customer regretting the purchase a week later.

1. Company Foundation

1.1 Mission Statement

[Insert the company's mission in one or two sentences. Who do we serve and what do we do for them?]

1.2 Vision

[Insert the CEO's vision for where the company is going and why it matters.]

1.3 About Us

[Insert the short company story. Founding year, why the company was started, key milestones, current scale. This should match what is on the website.]

1.4 What We Sell, In Plain Words

[One paragraph. No jargon. If your mother read this, would she understand what the company sells and who buys it?]

1.5 The 30-Second Elevator Pitch

[Insert the company pitch. Problem + solution + proof, in 30 seconds or less.]

2. Ideal Customer Profile

The ICP is the single most important page in this playbook. Every hour spent selling to a company outside the ICP is an hour stolen from pipeline that could close. Most founders cannot say no to bad-fit deals because they think they cannot afford to. The truth is they cannot afford not to.

2.1 Who We Sell To

Firmographic criteria

- Industry: [list]
- Company size: [employees and revenue ranges]
- Geography: [regions, countries, time zones served]
- Technology stack: [systems they need to have in place for our product to fit]

Behavioral and situational triggers

- A specific event that has made this problem urgent (new regulation, breach, leadership change, growth milestone)
- How did they learn about us (channel patterns from our best customers)
- Past purchase patterns that correlate with a fast close

Buying power

- Budget already allocated or executive willingness to allocate
- Sales cycle pattern seen from similar closed customers

2.2 Who We Do Not Sell To

This is the list that protects your calendar. If a prospect matches any of these, disqualify early. Do not try to force a fit.

- Company size below [X] or above [Y]
- Industries where our product has consistently underperformed
- Prospects who need a custom build we cannot deliver without margin erosion
- Prospects with a stated preference for free or open-source alternatives
- Any deal where we cannot identify the Economic Buyer within 30 days

2.3 Common Traits of Our Best Customers

[List the five to ten observable traits shared by our most profitable, longest-tenure customers. These become pattern-match signals for new prospects.]

3. The Buying Committee

In most B2B deals, six to thirteen people are involved in the decision. If you only work one contact, you are one resignation or one reorg away from losing the deal. Map the committee early. Re-map it every two weeks — people change roles, priorities shift, budgets move.

3.1 The Six Roles To Identify In Every Deal

Role	What they care about	What we give them
Economic Buyer	Has final budget authority. Cares about business outcome and ROI.	Business case, ROI model, peer customer reference
Champion	Wants this to succeed. Benefits personally from the win.	Internal sales kit, objection responses, weekly coaching
Technical Buyer	Evaluates fit with existing systems. Looks for reasons it will not work.	Technical deep dive, security documentation, API specs
End User	Will use the product every day. Wants it simple, fast, and useful.	Demo, pilot access, training plan
Legal / Procurement	Wants low risk and standard terms. Engaged late, kills deals fast.	Pre-approved redlines, SOC 2 / ISO docs, reference contracts
Executive Sponsor	Cares about strategic outcome. Rarely in details, appears at finish line.	One-page executive brief, ROI summary

3.2 Champion Versus Contact

A contact talks to you. A Champion sells for you when you are not in the room. Champions are defined by actions, not titles.

A real Champion: sends you unsolicited internal information, sets up meetings with other stakeholders, warns you when a competitor is gaining ground, defends your solution in internal reviews.

Not a Champion: someone who takes your calls, likes you, tells you things are going well, and never introduces you to anyone else.

> **Rule 2**
> If you do not have an identified, active Champion by the end of the second meeting, the deal is not qualified.

4. The Sales Pipeline

Every opportunity in the CRM lives in exactly one of these seven stages. A deal does not advance to the next stage until every exit criterion has been met. This is not a guideline. This is the rule.

4.1 Stage Definitions and Exit Criteria

STAGE NAME	PROBABILITY
SQL - Completed Discovery - scheduled next step	20%
Completed 2nd Discovery or demo - requested proposal	30%
Spoken with all people affected by decision	50%
Completed PoV / Pilot / PoC	70%
Contract sent to purchasing	90%
Closed Won	Won (100%)
Closed Lost	Lost (0%)

Stage	What it means	Exit criteria to advance
1. SQL	At least one two-way conversation has happened.	Discovery call completed. Initial pain identified. Next step confirmed in writing.
2. 2nd Discovery or demo	Real pain, real budget path, real authority, real timeline.	Deliver the demo here first, if possible. Decision process mapped. Pain quantified — MRR opportunity or insurance / differentiation pain. Proposal requested.
3. In contact with buying committee	Multi-thread completed.	Owner / CEO identified by name. All people affected by the decision, including the Champion, have been contacted. Demo delivered to Owner and Tech Lead. Written POV success criteria signed by Owner. Mutual Action Plan shared.
4. POV / POC / Pilot	Prospect has used software in their environment.	A clear definition of success has been created and agreed to, along with any payment for the POV.
5. Contract sent to purchasing	Terms final. Legal engaged.	Partner program terms delivered. Pricing for partner + customer resale model agreed. No open objections.
6. Closed Won / Lost	Signed agreement or dead deal.	Counter-signed partner agreement (Won). Documented loss reason (Lost).

4.2 Pipeline Hygiene

- Every deal has a next step with a date. No exceptions.
- No deal sits in any stage longer than the defined maximum time without escalation. (See section 4.3.)
- If a contact goes dark for 14 days, move the deal back one stage or close lost.
- Close Lost is not a failure. A bloated pipeline is. Closing a bad deal early frees you to find a good one.

4.3 Maximum Time In Stage

Customize these times to your business. When a deal exceeds the maximum, it gets escalated for review. The goal is not punishment. The goal is to stop deals from rotting quietly in the pipeline.

- Engaged: 14 days
- Qualified: 30 days
- Evaluating: 45 days

- Proposal: 21 days
- Negotiation: 30 days

5. Qualification Framework
Every active opportunity gets scored against eight elements. This is not optional. Every deal review starts with the scorecard.

5.1 The Eight Elements

Element	The question it answers
Metrics	What measurable outcome does the customer want, and by when? (Dollar, percent, hours, risk reduction.)
Economic Buyer	Who has the authority to approve this purchase? Named, confirmed, ideally met.
Decision Criteria	What must our solution do to be chosen? (Technical, business, relational.)
Decision Process	What steps must happen inside their company for a yes? (Demos, reviews, approvals, legal.)
Paper Process	What must happen on the legal and procurement side once a yes is given?
Identify Pain	What is the problem costing them today, quantified? What is the cost of doing nothing?
Champion	Who inside the account benefits personally from this purchase succeeding, and will fight for it?
Competition	Who else is being evaluated? Including the status quo (doing nothing).

5.2 The Deal Scorecard

For each active opportunity, score each element 0–2:

- 0 = unknown or not yet confirmed
- 1 = identified but not confirmed in writing or by behavior
- 2 = confirmed, documented in CRM, current within last 14 days

Total possible: 16. Required thresholds:

- Stage 3 (Qualified): minimum score of 8, with non-zero on Economic Buyer, Identify Pain, and Champion.
- Stage 5 (Proposal): minimum score of 12.
- Stage 6 (Negotiation): minimum score of 14.

Why the scorecard matters
40–60% of B2B deals end in 'no decision.' The status quo is the number-one competitor. If you cannot score the deal, you cannot defeat the status quo, because you do not know why they would change.

6. Prospecting

Prospecting is the oxygen of the sales team. Everything else in this playbook is useless without it. Every Account Executive prospects every day, unless the CEO has personally taken them off outbound for a defined period.

6.1 The Daily Prospecting Standard

- [X] new decision-maker contacts added to sequence per day
- [X] personalized outbound touches per day (calls, emails, LinkedIn)
- [X] voicemails per day
- [X] follow-ups on existing sequences

Customize to your business. The key is the number is specific and tracked.

6.2 Research Before Outreach

Every outbound touch references something specific to the prospect. Not a template with a name swapped in. Specific. That is the difference between a Professional Salesperson and a spammer.

Before any first touch, know:

- Their current role and how long they have been in it
- A recent signal (hire, funding round, press release, LinkedIn post, earnings commentary, regulatory filing)
- Who their competitors are and which ones are customers of ours
- What tools and systems they already use (from job posts, stack intelligence, public references)

6.3 Cold Call Script — Live Pickup

This is a template. Customize the specifics to your product and the prospect.

> **Opening line**
> Hi [Name], this is [Your Name] from [Company]. I know you were not expecting my call. May I tell you why I am calling **YOU?** (Emphasize YOU)

Pause briefly. Most people say yes out of curiosity. Continue:

> **Reason for the call**
> I was looking at [specific signal — the hire they just posted, the funding round, the regulatory change affecting their industry]. We have been helping [similar type of company] [specific outcome — the measurable result]. Would you be open to a short call to see if any of that applies to you?

If they say yes, schedule immediately. If they say no, deliver a professional goodbye and log the attempt.

6.4 Cold Call Script — Voicemail

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Keep it under 22 seconds. Do not leave your name at the start — if they do not recognize the name, the message is deleted.

Voicemail template
Hi [Name] — I called because I noticed [specific, single signal from their LinkedIn or company news]. If you would like to hear how we helped [similar company] achieve [specific, measurable outcome], please call me back at [phone]. This is [your name] from [company]. Thank you.

6.5 Email Templates

First touch email

Subject: A thought for [Company]
Hi [First Name] — congratulations on [specific signal]. As you [scale, grow, navigate X], a lot of [role] in similar companies hit [specific, named problem]. We built a way to solve that, and we have documented results at [two customer names] showing [specific outcome]. Worth a 20-minute call to see if any of this applies to you? [Your name] [Title, Company, phone]

Follow-up email (after no response)

Subject: Still a priority?
Hi [First Name] — I have not heard back, so I am guessing this is either not a priority right now, or it is one of fifty things on your plate. Either is fine. If I should circle back in a quarter, just reply with "later" and I will. If it is worth a conversation sooner, here is my calendar: [link]. [Your name]

6.6 LinkedIn Outreach

LinkedIn connection requests are not sales pitches. A connection request with a pitch gets ignored and often reported.

- Connection request message (optional): one sentence referencing why, no pitch.
- After the connection is accepted, engage with their content for at least two weeks before any direct outreach.
- First direct message: curiosity, not pitch. 'Saw your post on X — are you seeing that play out at [Company]?'
- Escalate to a call only after value has been delivered on LinkedIn first.

6.7 Multi-Threading

Do not work a single contact in any account over $25K ACV. Identify three to five roles and outreach all of them with messaging tailored to each role's priorities. If one leaves the company, the deal survives.

7. Discovery

Discovery is not a sales pitch with questions. It is a diagnostic conversation where the customer does most of the talking. If you are talking more than the customer on a discovery call, you are pitching, not discovering.

7.1 The Discovery Framework

Use this order. Every discovery call follows the same four-box structure.

Box	What you are learning	Sample questions
Situation	Current state. What do they have, what do they do, how does it work today?	What are you doing now for [X]? How is it set up? Who is involved?
Problem	What is broken, slow, expensive, or risky about the current state?	What is the biggest issue with how it works today? What has derailed similar projects in the past? When was the last time this problem caused a real business issue?
Impact	What does the problem cost? Quantify in dollars, time, risk, or customer impact.	How much time does this cost your team weekly? If this is not fixed, what happens in six months? How does this affect other departments?
Payoff	What does solving it look like? This is how the customer sells it internally.	If this were solved, what does your day look like? What would that save you annually? What is the business goal driving this?

7.2 Power Questions

Separate yourself from the average salesperson by asking questions that:

- Access emotion, not just analytics. 'What are you most excited about in your business right now?' beats 'What are your top three priorities?'
- Engage the customer in the solution. 'What options are you considering?'
- Focus the conversation on the right issue. 'What is the most valuable use of our thirty minutes today?'
- Uncover the highest-level goal. 'What is the business goal driving this initiative?'
- Challenge gracefully. 'Is 10% enough? We have other customers who hit X%.'
- Establish you as a Trusted Advisor. 'Many of my clients are grappling with [specific issue] right now — what has been your experience?'

7.3 The How and What Rule

Use open-ended questions that start with How or What. They produce longer, richer answers than questions that start with Why or Do. 'Why' puts the prospect on the defensive. 'How' invites explanation.

7.4 After the Discovery Call

Every discovery call ends with three things:

1. A confirmed summary of what they told you, sent in writing within 24 hours.
2. A clear next step with a date on the calendar.
3. An updated deal scorecard in the CRM before the end of the same day.

8. Demos, POCs, and Evaluations

8.1 The Demo

A demo is not a feature tour. It is a targeted answer to the specific business problems the customer told you about in discovery. If you find yourself demoing something they did not ask about, stop.

Before the demo

- Have the names and roles of every attendee
- Confirm the specific questions or use cases each attendee needs to see answered
- Open all supporting documents (pricing, MSA, case studies) in background tabs
- Clean your screen. Close Slack, email, and anything personal
- Test screen share on a second device to see what they see
- Record the demo (with permission) so you and the customer can revisit it

During the demo

4. Introduce the agenda in one minute.
5. Ask each attendee: 'Given our time today, what is the single most important thing I could cover for you?' Write it down.
6. Demo to the highest-level person's priority first.
7. Pause every 5–7 minutes to ask: 'Is this what you were hoping to see?'
8. Sprinkle in business questions: 'How is this budgeted?', 'Who else would be involved?', 'What is your timeline?'

After the demo

9. Ask: 'Did I cover what each of you wanted to see?'
10. Ask the most senior attendee: 'What is the next step?' Then: 'Then what happens?'
11. Send a written summary within 24 hours.

8.2 POC and POV — Where Deals Go To Die

The majority of enterprise deals that die, dies in the proof-of-concept phase. Usually because the POC was started with no written success criteria, no timeline, and no defined exit path.

The POC Entry Gate
Before any POC begins, the following must be in writing and signed by the Economic Buyer: 1. The business problem the POC is testing. 2. The measurable success criteria (specific numbers, not 'we like it'). 3. The duration (14, 21, or 30 days — not open-ended). 4. The decision that follows a successful POC (signed contract on [date]). 5. The named attendees for the closing review.

POC stages

12. Kickoff: All named stakeholders attend. Success criteria restated.

13. Mid-POC check-in: Assess progress, surface blockers.
14. Final review: Measure against written success criteria. If met, move to contract.

If a POC is requested and the customer will not sign the entry gate, the deal is not qualified. Either the Economic Buyer does not actually care, or they are using you for free consulting. Both are reasons to disqualify.

9. The Mutual Action Plan

A Mutual Action Plan (MAP) is a shared document between seller and buyer that lists every step, owner, and date between today and a signed contract. It is the single most effective tool for beating 'no decision,' which is the outcome in roughly half of B2B deals.

9.1 When to Use

- Every deal above [$X] ACV
- Every deal with more than three people on the buying committee
- Every deal where the expected cycle is longer than 60 days

9.2 What It Contains

Step	Owner	Target date
Discovery call completed	[Rep] + [Buyer]	[Date]
Demo delivered to full buying committee	[Rep]	[Date]
Success criteria signed for POC	[Buyer]	[Date]
POC kickoff	[Rep] + [Buyer]	[Date]
Mid-POC review	[Rep] + [Buyer]	[Date]
Final POC review with Economic Buyer	[Rep] + [EB]	[Date]
Pricing proposal delivered	[Rep]	[Date]
Legal redlines exchanged	[Legal] + [Rep]	[Date]
Procurement approval	[Buyer procurement]	[Date]
Counter-signed contract	[Rep] + [EB]	[Date]
Kickoff and onboarding	[CS] + [Buyer]	[Date]

The MAP is shared with the Champion in the first Qualified-stage meeting. It is reviewed in every subsequent meeting. Dates slip — that is fine. What is not fine is a deal where the MAP is forgotten, because that deal is drifting toward 'no decision.'

10. Objections

An objection is not a rejection. It is a request for more information. Professional Salespeople expect objections, prepare for them, and use them to advance the conversation.

10.1 Why People Object

- They want more information
- They want a better price or better terms
- They want clarification on a specific point
- They are stalling because they have not decided internally
- They are negotiating
- They are doing due diligence — in which case you should be glad

10.2 The Objection Response Pattern

15. Acknowledge. 'That is a fair concern.'
16. Clarify. 'Can I ask what is driving that specifically?'
17. Isolate. 'If we could address that, would there be anything else holding this up?'
18. Respond. Address the real concern with the specific proof or adjustment.
19. Confirm. 'Does that resolve it?'

10.3 Common Objections and Responses

[Customize this section per product. The goal is a one-page response crib sheet.]

Objection	Response approach
We already have a solution.	Ask what is working and what is not. Most solutions are 'good enough' until a specific problem is surfaced.
It is too expensive.	Price only matters if value is unclear. Return to the quantified pain from discovery. What is the cost of doing nothing?
We do not have budget this year.	Fiscal year budget is a real constraint, not a rejection. Ask about next fiscal cycle timing and how decisions get made then.
Send me information.	Information without context does not close. Ask: 'What specifically would be most useful? I will prepare that and we can review it together on a short call.'
We need to think about it.	'Fair. What specifically do you need to think through? If there is a concern I have not addressed, I would rather know now than in three weeks.'
I need to check with my boss.	'Of course. What do you think their reaction will be? What concerns might they raise?' Arm your Champion.

11. The Competition

Assume the competition is strategizing how to beat you. Know them. Do not build your business model around them, but do know them.

A rule that cannot be broken
Never bad-mouth a competitor. If asked, say: 'I can't say anything about them. However, I can explain why we are a much better choice.' Then do.

11.1 Battle Card Template

Build one of these for every competitor we face more than once a quarter.

Competitor	[Name]
Who they are	[One-sentence description]
When we win	[3 scenarios where we beat them consistently]
When we lose	[3 scenarios where they beat us — be honest]
Our 3 proof points	[Specific customer wins, specific outcomes, specific numbers]
Their weak spots	[What to ask the customer that surfaces where they fall short]
Landmines to plant	[Questions that make the customer question them, without bad-mouthing]
Pricing posture	[How they price, where we are higher/lower, why that is okay]

11.2 The Status Quo

The most common competitor in enterprise sales is doing nothing. 'No decision' beats the winning vendor in 40–60% of B2B deals. The way to defeat the status quo is quantified pain. If the customer cannot say specifically what it costs them to keep doing what they are doing, they will keep doing what they are doing.

12. Sales Rules and Account Ownership

When someone's income is at stake, rules matter. Written rules prevent disputes. These rules are the default — specific situations may adjust, but the default applies unless Sales Management says otherwise.

12.1 Prospect Ownership

- A contact is owned by the first rep to speak (not email) with that contact.
- Once contacted, a prospect is locked to that rep for 90 days, provided the rep speaks (not emails) with someone at the company at least once every 90 days.
- A voicemail or unanswered call buys 30 days, not 90.
- After 12 months with no closed business, the account can be reassigned.

12.2 Customer Ownership

- A rep should speak with every customer at least monthly. Set a recurring CRM task.
- If a rep does not speak with a customer for three months, the customer can be reassigned without notice.

12.3 Multiple Locations

- Customer with multiple locations: the rep owns all locations provided they have contacted each within 60 days of the first close.
- Prospect with multiple locations: another rep can work a second location. If they close it, the original rep defers to the ownership rule.

12.4 Inbound Leads

- Inbound lead received 8:30 AM – 4:30 PM local: respond within 15 minutes. Fast response is a conversion multiplier.
- Inbound received before 8:30 AM: respond by 10:00 AM.
- Inbound received after 4:30 PM: respond by 9:00 AM the next business day.
- If the assigned rep does not respond within 24 business hours, the lead is reassigned.

12.5 SDR Hand-Off

- When an SDR-qualified lead is handed to an AE, the AE has 24 hours to contact the prospect.
- Hand-off includes a written summary of what the SDR learned. Not a calendar invite.

13. Onboarding a New Sales Rep

Nothing is more demoralizing for a new hire than arriving on day one and being handed a laptop, a desk, and no plan. The first two weeks set the tone for the whole tenure.

13.1 Before Day One — Done By The Sales Manager

- Company email address provisioned
- CRM login with a starter dashboard assigned
- Phone, laptop, all tools issued
- Calendar pre-loaded with week 1 and week 2 meetings
- Welcome note from the CEO
- This Sales Playbook printed and on the desk

13.2 Week 1 — Fundamentals

Day 1: Company overview (CEO), product overview (VP Sales or Product lead), finance and comp walkthrough (CFO), welcome lunch, and reading assignment — sections 1–3 of this playbook.

Day 2: Product deep dive. Demo walkthrough. CRM training. Reading — sections 4–5 of this playbook.

Day 3: Cold call script practice. Role play with the Sales Manager. Listen to three recorded top-rep calls.

Day 4: Shadow a senior rep on live calls. Demo practice. Start reading the 'How to be a Professional Salesperson' training course.

Day 5: Pass the product knowledge assessment. Pass the cold call script role-play. First live outbound with manager listening.

13.3 Week 2 — Live Pipeline

- Take over starter accounts with Sales Manager shadowing
- Own two discovery calls by end of week
- Begin daily prospecting at 50% of full standard
- Complete reading the full playbook

13.4 30 / 60 / 90 Day Milestones

- Day 30: Full prospecting standard. Owns own pipeline. First qualified opportunities.
- Day 60: First close expected. Full demo ownership. Full POC ownership.
- Day 90: On-plan ramp quota. Independently running full pipeline.

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14. KPIs and Metrics

What gets measured gets managed. What does not get measured gets guessed at, which is how founders end up with a pipeline that evaporates when they step away.

14.1 Leading Indicators — By Rep, Tracked Weekly

- Dials per day
- Connects per day (real conversations, not voicemails)
- New meetings booked per week
- Discovery calls completed per week
- Demos delivered per week
- Proposals sent per week
- Active Mutual Action Plans

14.2 Lagging Indicators — By Rep, Tracked Monthly

- Win rate (closed-won / (closed-won + closed-lost))
- Average deal size (ACV)
- Average sales cycle in days
- Pipeline coverage ratio (open pipeline / remaining quarterly quota)
- Quota attainment

14.3 Pipeline Coverage Targets

As a general rule, a rep should carry pipeline equal to 3x to 5x remaining quarterly quota to have a realistic chance of hitting. Coverage below 3x means the rep needs to prospect heavier. Coverage above 7x usually means deals are being left in stages too long.

14.4 Forecast Definitions

Every forecast call uses these four categories. They mean specific things. They are not interchangeable.

Category	Definition
Commit	Rep will stake their career on this closing this quarter. If it does not close, there is a very specific, defensible reason why.
Best Case	Realistic upside. Deal could close this quarter if key risks resolve.
Pipeline	Active opportunity. Not forecast to close this quarter.
Omitted	Deal that should be closed out of the pipeline.

15. Meeting Follow-Up

Write a follow-up summary within 24 hours of every meeting. No exceptions. This is the single highest-leverage habit in professional selling.

Why it matters: people hear what they want to hear. A written summary corrects the record, holds both sides to what was agreed, and separates you from every other vendor they are evaluating. Most reps do not do this. Do it.

15.1 The Template

Meeting Follow-Up — [Date] — [Client Name]
Attendees: [List] What we discussed: • Item 1 • Item 2 • Item 3 Action items for [our company]: • Item (owner, date) Action items for [client]: • Item (owner, date) Agreed next step: [specific meeting, date, time] If anything here does not match your recollection, please reply and correct me.

16. Debriefing Every Deal

Win or lose, every deal teaches something. Holding a short debrief on every closed deal is one of the fastest ways to get a sales team collectively smarter.

16.1 Debrief Questions

20. What did we do right?
21. What did we do wrong?
22. What signals did we miss?
23. Did we identify the true Economic Buyer, and did they engage?
24. Did we have a real Champion, or a contact?
25. Was the Mutual Action Plan current?
26. Why did they buy (or not buy)?
27. If we lost, do we know exactly what the winning vendor did that we did not?
28. If we won, what is the chance of expansion?
29. What changes to this playbook does this deal suggest?

17. Testimonials and Social Proof

Self-praise is no recommendation. What your customer says about you is worth ten times what you say about yourself.

17.1 When to Ask

Immediately after the customer has solved the problem they hired you to solve and is visibly happy about it. That window closes faster than most reps realize. Ask while the win is fresh.

17.2 How to Ask

The ask
"[Name], are you happy enough with what we have done to provide a testimonial?" [If yes] "I know you are busy. I am very familiar with the account. Would it save you time if I wrote a draft for you to review and edit? You can obviously change anything."

Most customers say yes. Drafting it yourself removes the friction and produces a better testimonial because you know which specifics matter.

18. Tech Stack and CRM Standards

Tools do not close deals. Reps close deals. But tools used consistently multiply a rep's effective capacity, and tools used inconsistently create a pipeline nobody can trust.

18.1 Our Tools

- CRM: [name]
- Dialer: [name]
- Sales engagement / cadence: [name]
- Prospect data: [name — e.g., ZoomInfo, LinkedIn Sales Navigator]
- Video / recording: [name]
- Document signing: [name]

18.2 CRM Standards — Non-Negotiable

- Every activity logged the same business day
- Every deal has a next step with a date
- Every deal has the Economic Buyer named or flagged unknown
- Every deal has a scorecard updated within the last 14 days
- Every meeting has a follow-up logged within 24 hours

A deal not in the CRM does not exist. If it is not logged, it will not be credited, forecasted, or defended if ownership comes into question.

19. Compensation

The specific compensation plan lives outside this playbook and is reviewed annually. This section exists so every rep understands the principles behind how we pay.

19.1 Pay Principles

- Base salary at a level that lets a rep do the job without financial panic
- Variable tied to the outcomes that matter to the business — closed revenue, margin, retention
- Accelerators above quota to reward over-performance
- Clawbacks for customers who churn within a defined window
- Plans simple enough to explain on one page

If any rep cannot explain how they are paid, that is a management failure, not a rep failure.

Appendix A — The Professional Salesperson Self-Assessment

Print this. Rate yourself monthly on a 1–5 scale. Share with your manager. No score stays low for two months in a row.

- I know my product's features and benefits cold
- I talk to someone new every day
- I am proactive, not reactive
- I ask for the business
- I think like a business owner, not just a salesperson
- I paint a picture of success for my prospect
- I smile when I speak on the phone
- I out-listen and out-explain the competition
- I am genuinely passionate about my product
- I am prepared for any objection or stall
- I have done my homework on their company
- I have done my homework on the specific people
- I walk in with ideas and questions, not a pitch
- I ask more than I talk
- I do not interrupt
- I do not talk about what we do — I talk about how they win
- I confirm what they want to achieve before I propose anything
- I listen with intent to understand, not to respond
- I uncover their real motives for buying
- I answer with a question when appropriate
- I use humor (not jokes) when appropriate
- I take notes — it shows respect and preserves detail
- I customize every demo and presentation
- I discuss money openly
- I use testimonials to create a buying atmosphere
- I am patient, not anxious
- I ask for the sale when I hear a buying signal
- I never leave a meeting without the next step formalized
- I organize my day because time is money
- I know the steps in my process and take them at the right time
- I say 'I don't know — I'll find out' when I don't, then do
- I win alone but I never lose alone
- Every call has a purpose, first for them, then for me

Appendix B — Industry Terms

[Customize this to your industry. List only the terms a new rep actually needs. Jargon for the sake of jargon does not help. Do not pad this list — cut anything that does not appear in real customer conversations.]

- [Term] — [plain-language definition]
- [Term] — [plain-language definition]
- [Term] — [plain-language definition]

Appendix C — Reference Documents

This playbook does not replicate everything. The following documents live elsewhere and are referenced by this playbook.

- Compensation plan (current year)
- Master pricing sheet
- MSA and standard terms
- Customer case studies and reference list
- How to be a Professional Salesperson — full training course
- Recorded top-rep calls library
- Product training videos