

The *Sales Playbook* Template



A well-designed sales playbook is accessible to your sales team, easy to navigate, and clear in how it's meant to be applied. We recommend creating a digital version of your sales playbook that can be easily updated and shared with your sales team. Use this template as a starting point, expanding what we have here to include as many profiles, competitors, customer needs, etc. as makes sense for your organization and industry.

[Company Name] Sales Playbook

1. COMPANY OVERVIEW AND VALUE PROPOSITION

Mission & Vision Statement: _____

Market Context: _____

Value Proposition: _____

Target Market Overview: _____

2. IDEAL CUSTOMER PROFILES

Profile 1: _____

Profile 2: _____

Industry: _____

Industry: _____

Company Size: _____

Company Size: _____

Key Decision Makers: _____

Key Decision Makers: _____

Common Pain Points: _____

Common Pain Points: _____

3. COMPETITIVE INTELLIGENCE

Main Competitor 1: _____

Main Competitor 2: _____

Strengths: _____

Strengths: _____

Weaknesses: _____

Weaknesses: _____

Our Differentiation: _____

Our Differentiation: _____

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4. CUSTOMER NEEDS

Category 1: _____

Category 2: _____

Specific Need: _____

Specific Need: _____

How Our Solution Addresses It:

How Our Solution Addresses It:

Get a framework you can use to achieve the three outcomes you need to sell an idea. →

5. PRODUCT/SERVICE INFORMATION

Product/Service 1: _____

Product/Service 2: _____

Key Features: _____

Key Features: _____

Benefits: _____

Benefits: _____

Use Cases: _____

Use Cases: _____

Success Story: _____

Success Story: _____

6. SALES PROCESS AND STRATEGIES

Stage 1: _____

Stage 2: _____

Key Activities: _____

Key Activities: _____

Best Practices: _____

Best Practices: _____

Tools/Resources: _____

Tools/Resources: _____

Stage 3: _____

Stage 4: _____

Key Activities: _____

Key Activities: _____

Best Practices: _____

Best Practices: _____

Tools/Resources: _____

Tools/Resources: _____

Use these guidelines to refine your sales process stages and align to the buying process. →

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7. SALES TOOLS AND RESOURCES

Provide a link or location to related guides/templates for each item below.

CRM Usage Guidelines: _____

Proposal Template: _____

Contract Template: _____

Presentation Deck Template: _____

Email Templates: _____

Prospecting: _____

Follow-up: _____

Meeting Request: _____

Objection Handling Guide: *Don't have one? Access RAIN Group's objection handling guide [here](#).*

Prospecting Guide: *Don't have one? Access RAIN Group's prospecting toolkit [here](#).*

Needs Discovery Guide: *Don't have one? Access RAIN Group's needs discovery toolkit [here](#).*

Get email template ideas with the 13 golden rules of email prospecting. [➔](#)

8. TRAINING MODULES

Module 1: _____

Module 1: _____

Key Learning Objectives: _____

Key Learning Objectives: _____

Resources: _____

Resources: _____

Browse RAIN Group's 86 sales training modules, starting with consultative selling. [➔](#)

9. METRICS AND KPIS

Key Performance Indicator 1: _____

Definition: _____

Target: _____

Measurement Frequency: _____

Key Performance Indicator 2: _____

Definition: _____

Target: _____

Measurement Frequency: _____

Get ideas for which KPIs you can track with the [Essential List of Sales Metrics](#). 

10. CONTINUOUS IMPROVEMENT PROCESS

Feedback Collection Method: _____

Review Frequency: _____

Update Process: _____