

Sales Playbooks & Execution Management

Standardize sales execution with playbooks, workflows, and real-time visibility into deal progress.

Specification

SKU	BUS-REV-PLY
Solution area	Business Operations
Works with	Sales CRM, Revenue Operations & Forecasting, Customer Lifecycle & Success Management
Updated	Sep 26, 2026
Datasheet	v1.0

What it is

Sales Playbooks & Execution Management is the process of defining, standardizing, and guiding sales activities through structured workflows and best practices. It ensures that sales teams follow consistent processes and achieve better outcomes.

SmartSuite’s Sales Playbooks & Execution Management solution provides a structured, scalable system to guide sales teams through standardized processes, best practices, and workflows. It enables organizations to move from inconsistent selling approaches to a repeatable, data-driven sales execution system.

With a centralized playbook system, sales teams gain clarity on what actions to take at each stage of the sales cycle.

Core capabilities

Sales Playbook Creation & Management

Define and manage sales methodologies and processes.

Guided Selling Workflows

Provide step-by-step guidance for sales teams.

Deal Stage & Milestone Tracking

Track progress through sales stages.

Sales Process Standardization

Ensure consistency across all deals and teams.

Task & Activity Management

Assign and track sales activities.

Integration with CRM & Pipeline Data

Connect playbooks to real deal activity.

Performance Tracking & Insights

Measure adherence and effectiveness.

Workflow Automation & Alerts

Trigger actions based on deal progress.

Role-Based Access & Governance

Ensure structured and controlled execution.

The Sales Execution Lifecycle

Step 1 Define Playbooks & Processes Establish sales methodologies.	Step 2 Apply Playbooks to Deals Guide sales teams through workflows.	Step 3 Execute Activities & Track Progress Manage tasks and milestones.	Step 4 Monitor Performance & Adherence Track execution effectiveness.	Step 5 Optimize & Improve Continuously Refine playbooks based on results.
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Who it is for

Sales Leaders (CRO, VP Sales) Define and optimize sales processes.	Sales Teams (AEs, SDRs) Execute deals using structured playbooks.	Revenue Operations Teams Monitor and improve execution.
Customer Success Teams Align handoffs and post-sale processes.	Executive Leadership Monitor performance and outcomes.	

Works with

Sales CRM Tracks deals and pipeline activity.	Revenue Operations & Forecasting Measures performance and outcomes.
Customer Lifecycle & Success Management Supports post-sale handoff.	

Built differently. Sales Playbooks & Execution Management runs on the same relational platform as every other SmartSuite product, so its records link to the risks, controls, issues and evidence they affect, and every report reflects the current state rather than a copy.

See it working with your data

Ask your SmartSuite account team for a demo of Sales Playbooks & Execution Management configured for your organization, or read the full product entry at smartsuite.com/products/sales-playbooks-execution-management.

Schedule a demo