

Sales Playbook Checklist



Smart Strategy, Unstoppable Growth.



Why A Playbook Exists (And Why It Matters)

This isn't just documentation. This is your sales team's competitive weapon. It's built to align your team, sharpen your strategy, and accelerate your results. Know who you're selling to, how you're showing up, and why it's going to win. Use this checklist to build your path to unstoppable growth!

Ideal Customer Profile (ICP)

- ☐ Cut the noise. Get laser-focused on who actually buys. Define your sweet-spot customers by industry, size, pain points, triggers, and patterns. Sell smarter — not wider.

Buyer Personas

- ☐ Who calls the shots? Understand the decision-makers, influencers, and blockers in your deals. What do they care about? What keeps them up at night? Map their goals, fears, objections, and behavior so your message lands.

Value Proposition & Messaging That Converts

- ☐ No fluff. No jargon. Just high-impact messaging that speaks to your buyers' pain and positions you as the only answer. Includes your elevator pitch and persona-specific positioning.

Discovery That Digs Deeper

- ☐ Stop surface-level selling. These open-ended questions help you uncover real needs, hidden objections, and decision drivers. Discovery is your power play — use it wisely.

Objection Handling Like a Pro

- ☐ Every "no" is just a not yet — if you're prepared. This guide tackles the most common objections with bold, confident responses that build trust and move deals forward.



The Sales Process — Your Roadmap to Revenue

- ☐ Every rep should know what's next. Break down the full sales journey — Prospecting, Discovery, Demo, Proposal, Close — and define the actions, tools, and mindset that drive each stage.

Outreach That Opens Doors

- ☐ Don't wing it. Use proven email templates, call scripts, voicemails, and follow-up cadences that get responses.

Sales Metrics That Matter

- ☐ Track what moves the needle. From meetings booked to win rates and pipeline velocity. These are the KPIs that tell you if your strategy is actually working.

Tech Stack & CRM Best Practices

- ☐ Your CRM isn't a journal — it's your sales command center. This section outlines your tools, usage expectations, and how to log activity like a pro.

Coaching, Feedback & Iteration

- ☐ Great playbooks evolve. Set the tone for sales coaching, rep feedback loops, and continuous improvement. This is a living document, and you are part of writing the next chapter.

This checklist is just the beginning... Don't let this get buried in your to-do list. If you're ready to turn this checklist into custom playbook that drives real results, visit [KLoEdge.com](https://www.KLoEdge.com). We'll help you bring it to life, and set you on the path to un growth.

