

DPO100

FREE TEMPLATE

Sales Playbook Template

Ten sections with a fill-in prompt under each one, and a worked example so you can see what finished looks like. Made for a solo seller or a team under ten.

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What's inside

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BEFORE YOU START

Read this first

- Figure out how you sell first. Someone who builds trust before anything else runs a discovery call differently than someone who walks in confident. Section 5 depends on knowing which one you are.
- Write section 2 before section 4. You can't write value statements until you know what the buyer is afraid of.
- Write section 6 from real calls. Keep a note on your phone for a week and type in every objection you hear, in the words they used.
- The home inspection examples are there to show how specific to get. Replace every one of them with yours.
- Plan on 20 to 40 hours spread over a few weeks if you do it properly. The personas, the talk tracks and the objections take the longest.

Full guide: [What is a sales playbook](#) · **Find your selling style:** [the 60-second Sales Edge quiz](#)

Playbook details

Fill this in before section 1. The review cadence is the part people skip, and it's the part that keeps the playbook alive.

Company	Owner	Last revised	Review cadence
			Quarterly

SECTION 01

Company and product overview

What it's for: *the shortest answer you can give to "what do you sell and why does it exist."*
Nobody reads a long version before a call.

Fill in	Your answer
What we sell, in one sentence	
What it replaces, or what the buyer does today without it	
What it costs and how it's priced	
The one reason it exists, in the buyer's words	

Example

FILLED-IN EXAMPLE · Same-week home inspections, sold to real estate agents

We do same-week home inspections, and the report is written so the agent can forward it to the buyer without rewriting it. Right now agents wait five to ten days and then soften the findings themselves. \$450 flat. We exist because in a hot market a slow inspection is how a deal falls apart.

SECTION 02

Ideal customer profile and buyer personas

What it's for: *knowing who buys, who decides, who signs, and who can kill it without ever saying no.*

Fill in	Your answer
Who buys (company type, size, situation)	
Who makes the decision, who influences it, who can block it	
For each person: what they care about, what they're afraid of, what they've been burned by before	
Who is not a fit, and the one question that reveals it	

Example

FILLED-IN EXAMPLE · Same-week home inspections, sold to real estate agents

Buyer: residential agents closing 15 or more deals a year. Decider: the agent. Blocker: the brokerage's preferred-vendor list. Afraid of: an inspection that scares the buyer off. Burned by: an inspector who found "everything" and sank a sale. Not a fit: agents under five deals a year. You find that out by asking how many closings they had last quarter.

SECTION 03

Sales process stages

What it's for: *the steps from first contact to close, and what has to be true before you move to the next one.*

For each of the seven stages, write what has to be true before you move on, and the one question or move that gets you there.

Stage	What has to be true to move on (exit criteria)	The question or move that gets you there
1 Open		
2 Make them feel understood		
3 Surface what it's costing them		
4 Picture the after		
5 Proof		
6 The offer		
7 The next step		

Example (stage 3)

FILLED-IN EXAMPLE · Same-week home inspections, sold to real estate agents

What has to be true: the agent has told me about a specific deal that fell through or dragged out because of an inspection, in their own words.

The move: "Tell me about the last deal where the inspection held things up."

SECTION 04

Messaging and value propositions

What it's for: *the three to five things you say about the product, in order, tied to problems the buyer told you about, not to features.*

Value statement	The buyer problem it answers
1	
2	
3	
4 (optional)	
5 (optional)	

Fill in	Your answer
The one-line version you'd say if you only had one sentence	

Example

FILLED-IN EXAMPLE · Same-week home inspections, sold to real estate agents

Same-week scheduling, so the deal isn't sitting for two weeks. A report the buyer can actually read, so the agent isn't rewriting it at 10pm the night before. Findings written as fixable, because "the furnace is 18 years old" lands differently than "FURNACE: DEFICIENT."

One line: "We'll get your inspection done this week, and the report won't scare your buyer."

SECTION 05

Talk tracks

What it's for: *the actual words for the moments that repeat, written the way you'd say them out loud, with a note on how to deliver each one.*

Moment	What you say	Delivery note
The opener		
The first discovery question		
The price question, answered		
The recap before the ask		
The ask		

Example (the opener, inbound call)

FILLED-IN EXAMPLE · Same-week home inspections, sold to real estate agents

"Thanks for calling. Before I give you a price, what happened with your last inspector?"

Delivery: then stop talking. Let them tell the story. The price conversation goes better after you've heard it.

SECTION 06

Objection handling

What it's for: *the eight to ten objections you hear every week, each with a response, a question that moves things forward, and what you say if they push again.*

Finish this section first. It's the page you'll open during a call.

The objection, in the buyer's words	Your response	The forward question	If they push again
1			
2			
3			
4			
5			
6			
7			
8			

Example

FILLED-IN EXAMPLE · Same-week home inspections, sold to real estate agents

Objection: "I already have an inspector."

Response: "Good. If they're quick and your buyers aren't panicking over the reports, stick with them."

Forward question: "How long was it from booking to report on the last one?"

If they push: "Nine days? Then the only reason to talk to me is if nine days has ever cost you a deal."

SECTION 07

Competitive positioning

What it's for: *how you answer "why you" without running anyone down.*

Fill in	Your answer
Who else the buyer looks at	
What each of them does well (say it plainly)	
The one thing you do that they don't, in a sentence	
The question that turns the comparison back to what the buyer needs	

Example**FILLED-IN EXAMPLE · Same-week home inspections, sold to real estate agents**

They look at the big franchise inspectors and the cheapest guy on Google. The franchise is reliable and slow. The cheap guy is fast and sloppy. We're fast, and the report is one the buyer can read.

The question: "Are you comparing on price, or on how long your buyer has to wait?"

SECTION 08

Metrics

What it's for: *the four or five numbers that tell you whether the playbook is working.*

Metric	Current	Target	Where it lives, who checks it
Reply rate to first contact			
Discovery-to-proposal rate			
Close rate			
Average deal size			
Days from first contact to close			

Example

FILLED-IN EXAMPLE · Same-week home inspections, sold to real estate agents

Tracked in a shared sheet, reviewed Friday afternoons. Close rate right now is 22%. Target is 30% by the end of Q1.

SECTION 09

Tools and systems

What it's for: *where notes go, how follow-ups get scheduled, and what gets logged. Only as much as you'll keep up with.*

Fill in	Your answer
Where conversation notes are kept	
How follow-ups get scheduled, and by whom	
Follow-up cadence: how many touches, how far apart, when you stop	
What gets logged after every call (three fields max)	
What gets sent after every call	

Example**FILLED-IN EXAMPLE · Same-week home inspections, sold to real estate agents**

Notes go in the CRM the same day. Follow-ups get scheduled before the call ends. Four touches over three weeks: day 2, day 7, day 14, day 21. After that the agent goes on the quarterly list. Three things get logged: the buyer's exact words for their problem, the next step, and the date. A three-line recap email goes out within the hour.

SECTION 10

Onboarding and practice

What it's for: *how a new seller learns the playbook, and how the playbook itself gets better.*

New seller ramp	Focus
Week 1	
Week 2	
Week 3	
Week 4	

Fill in	Your answer
Who reviews their first ten calls	
The loss review: after every lost deal, which step failed and what the buyer said right before it	
How often each section gets revised	

Example

FILLED-IN EXAMPLE · Same-week home inspections, sold to real estate agents

Week 1: read sections 1 to 4, shadow three calls. Week 2: run discovery with someone listening. Week 3: full calls, recorded. Week 4: own a pipeline. Loss reviews go in the shared sheet. The objections section gets rewritten every quarter.

WHAT A TEMPLATE CAN'T DO

The headings are the easy part.

A template tells you what sections to write. It can't tell you what to say when a specific buyer pushes back on a specific thing, because it doesn't know your buyer or your product or how you talk. Done properly, filling this in takes 20 to 40 hours spread over a few weeks. The personas, the talk tracks and the objections take the longest, and they're the parts that matter.

Run it for thirty days, then go back through it. After every lost deal, write down which step failed and what the buyer said right before it. The step that keeps showing up is the one to rewrite.

DPO100

Rather have it filled in for you?

DPO100 builds a Conversation Compass from a 60-second quiz and four questions about what you sell. Same ten areas, written for your product, your buyer, and the situation you want to win more often. It takes a few minutes.

[Take the 60-second Sales Edge quiz →](#)

\$47, one time. No subscription. 30-day guarantee.

Read the full guide: [What is a sales playbook](#) · See four examples: [sales playbook examples](#)

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