

UNFYS · FREE TEMPLATE

Sales Playbook *Template*

Six sections, ready to fill in. From ICP definition to pipeline stage criteria — structured for founders who've never built a playbook before.

- 01 ICP DEFINITION
- 02 DISCOVERY FRAMEWORK
- 03 QUALIFICATION CRITERIA
- 04 OBJECTION HANDLING
- 05 PIPELINE STAGE DEFINITIONS
- 06 PROPOSAL & CLOSE PROCESS

6 SECTIONS FILL-IN FORMAT UNFYS.COM

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PLAYBOOK

How to Use This Template



This template gives you the structure. Your job is to fill in the specifics for your business — your ICP, your discovery questions, your pipeline stages. The prompts in each section tell you what information goes there.

A first version that covers 60% of scenarios and is actually used beats a comprehensive document that sits in a folder. Start with what you know, fill in gaps from calls, and update it every quarter.

Who should fill this in: The founder, ideally with input from anyone else involved in deals. Do not outsource this to a first AE hire — they'll write what they think you want to hear rather than what's true.

SECTION 01

Ideal Customer Profile (ICP)

Your ICP is the description of the companies and buyers who are most likely to buy, derive real value, stay, and expand. It is built from your best existing customers — not from who you'd like to sell to.

Before filling this in: pull your top 5–10 customers by ARR or NPS. What do they have in common? Those commonalities are your ICP, not your aspirations.

Company-Level Criteria

COMPANY FIRMOGRAPHICS — fill this in for your business

Industry / verticals

e.g. B2B SaaS, Professional Services...

Company size (headcount)

e.g. 20–200 employees

Revenue range

e.g. £1M–£20M ARR

Geography

e.g. UK, DACH, Nordics

Stage / funding

e.g. Seed–Series B

Tech stack signals

e.g. HubSpot users, Slack...

Disqualification criteria (hard nos)

e.g. Less than 5 employees, no dedicated sales team, consumer market...

Buyer Persona

PRIMARY BUYER — fill this in for your business

Title / function

e.g. Head of Sales, Founder/CEO...

Reports to

e.g. CEO, CRO

Primary pain / trigger event

e.g. Missed quarter, first AE hire...

What they're measured on

e.g. ARR, pipeline coverage

What they care about most (in their own words)

Use language from actual calls and emails — not polished marketing copy...

SECTION 02

Discovery Framework

Discovery is the most important part of your sales process. What questions does a rep need to answer before they can know whether this is a real opportunity?

MUST-ANSWER QUESTIONS IN DISCOVERY — fill this in for your business

Business situation questions (understand their world)

e.g. Tell me about your current sales process. How many reps do you have? What's your average deal cycle?

Problem questions (uncover pain)

e.g. Where do deals tend to stall? What does your pipeline look like right now? What happens if this problem isn't solved in 6 months?

Impact questions (quantify the problem)

e.g. What does a missed quarter cost you? How many hours a week are you personally spending on sales?

Decision questions (understand the buying process)

e.g. Who else will be involved in this decision? What does your evaluation process look like? What's your timeline?

SECTION 03

Qualification Criteria

A qualified opportunity is one where you have confirmed evidence — not assumptions — that each of these elements is in place. Unconfirmed = not qualified.

MEDDPIC QUALIFICATION FRAMEWORK — fill this in for your business

M — Metrics: What is the quantified business impact of solving this?

e.g. £X revenue at risk, X hours/week wasted...

E — Economic Buyer: Who has final sign-off on budget?

e.g. CEO / CFO — confirmed in meeting or by champion

D — Decision Criteria: What are they evaluating on?

e.g. speed to value, fit with existing stack, references...

D — Decision Process: What are the steps to contract?

e.g. procurement review, legal sign-off, board approval...

P — Paper Process: What does contracting look like?

e.g. standard MSA, their paper, legal review required...

I — Identify Pain: Is there a confirmed, documented pain?

e.g. confirmed in discovery call, pain letter sent and agreed...

C — Champion: Is there an internal advocate actively helping?

e.g. who is this, what have they done to progress the deal...

SECTION 04

Objection Handling Guide

List the 5–8 objections that come up most often in your deals. For each one, write your best response — the one that actually works, not the polished version.

OBJECTION	YOUR RESPONSE
It's too expensive	Your best response here...
We're not ready yet	Your best response here...
We're already working with [competitor]	Your best response here...
We'll do this internally	Your best response here...
Can you send me more information?	Your best response here...

Add your most common objection...

Your best response here...

SECTION 05

Pipeline Stage Definitions

Each stage should have a clear definition and clear exit criteria — the specific evidence that needs to exist before a deal moves forward. Probability percentages should reflect your actual close rates, not aspirations.

STAGE 1

Prospecting / Lead

DEFINITION

EXIT CRITERIA TO STAGE 2

PROBABILITY

STAGE 2

Qualified

DEFINITION

EXIT CRITERIA TO STAGE 3

PROBABILITY

STAGE 3

Discovery / Demo

DEFINITION

EXIT CRITERIA TO STAGE 4

PROBABILITY

STAGE 4

Proposal / Evaluation

DEFINITION

EXIT CRITERIA TO STAGE 5

PROBABILITY

STAGE 5

Negotiation / Legal

DEFINITION

EXIT CRITERIA TO CLOSE

PROBABILITY

SECTION 06

Proposal & Close Process

PROPOSAL PROCESS — fill this in for your business

What triggers a proposal? (minimum qualification required)

e.g. Economic buyer confirmed, pain agreed, timeline established...

What does our standard proposal include?

e.g. Problem summary, proposed solution, pricing, terms, next steps...

Turnaround time from request to send

e.g. 48 hours standard, 24 hours if champion requests urgency

CLOSE PROCESS — fill this in for your business

Steps from verbal agreement to signed contract

e.g. 1. Verbal — send summary email same day. 2. Contract issued within 24 hours. 3. Follow up at 48, 72, 96 hours if not signed...

Who handles legal / contract negotiation?

e.g. Rep handles standard terms, escalate to founder for redlines

What's our standard payment / invoicing process?

e.g. Monthly in advance, annual upfront at 10% discount...