

NEW BUSINESS DEVELOPMENT & SALES · TEMPLATE

Sales Playbook & Discovery Toolkit

A minimum viable sales process for technology founders and early teams running their own first sales conversations.

How to use this: Fill in the stage definitions and criteria once as a team decision, then reuse the discovery script and follow-up templates on every call going forward.

Pipeline Stage Definitions

Define what must be true for a deal to sit in each stage. Adjust stage names to fit your motion, but keep the discipline of a one-sentence entry test per stage.

Stage	Entry Criteria (must be true to enter)	Exit Criteria (must be true to advance)
1. Discovery Booked	A call is scheduled with someone who has a stated problem	Discovery call has happened and been logged
2. Qualified	Meets your qualification checklist below	Buyer agrees the problem is worth solving now
3. Solution Agreed	Buyer has seen the product and confirmed fit	Buyer confirms this is the direction they want
4. Commercials in Review	Pricing / proposal has been sent	Buyer confirms budget and approval path
5. Verbal Commit	Buyer has said yes verbally or in writing	Contract signed / payment received

Qualification Checklist

Apply this the same way to every prospect. If you cannot check most of these, the deal does not belong past Stage 2.

- ☐ The problem described matches what the product actually solves today
- ☐ There is a real cost to the problem (time, money, or risk) that the prospect can name
- ☐ The person on the call can approve spend, or has named who can
- ☐ There is a reason this needs solving now, not eventually
- ☐ The company is a size/shape the product currently serves well
- ☐ The prospect has agreed to a specific next step, not just 'stay in touch'

Discovery Call Script Outline

Use this order. Resist the urge to pitch before the problem, cost, and decision path are all clear.

Opening: one sentence on why you're both here + confirm time available

Problem: 'Walk me through what's happening today that made you take this call.'

Cost: 'What is that costing you right now (time, money, or risk)?'

Prior attempts: 'What have you already tried, and why didn't it stick?'

Stakeholders: 'Who else would be involved in deciding on something like this?'

Budget/process: 'If this were the right fit, how would a decision like this get made?'

Timeline: 'What's driving timing? Is there a date this needs to be solved by?'

Close: agree and state the specific next step, owner, and date out loud

Next-Step Rule

A next step is only valid if it has all three of the following. Do not log a call as complete until it does.

- ☐ A specific action (not 'follow up'; name the actual action)
- ☐ A specific date (not 'soon' or 'next week')
- ☐ A named owner on both sides (you and them)

Follow-Up Email Template: After Discovery

Send within a few hours of the call while the conversation is fresh.

Subject line used

One-line recap of the problem in their words

What you agreed the next step is, with date and owner

Anything you promised to send (and did you attach/link it)

Follow-Up Call Template: Stalled Deal

Use when a deal has gone quiet past its agreed next-step date.

Reference the specific next step that was missed

Ask directly whether priorities have changed, rather than re-pitching

Offer one clear path forward with a new date

Decide: reschedule, or disqualify and mark the reason
