Sales Toolkit Framework

The goal of the sales toolkit is to quickly enable new sales teams and channel teams to sell faster. This requires training, testing, and content to support the training of the team as well as content used during the sales process. A basic sales toolkit includes the following:

Piece	Audience	Stage in the sales cycle (Aware, Discovery, Interested, Proposal, Contract, Close)	Description	Goal/CTA	Content type
Persona Overview	Direct & Channel Sales teams	N/A	Teach the sales team about the prospect, their pains and who is a good target vs. bad target	Create a clear picture of the prospect and their pains so sales teams can move the right audience into the sales funnel vs wasting time on the "wrong fit"	Deck
Training Deck & Video	Direct and Channel sales teams	N/A	Build out the sales process, explain all of the tools used at different stages, stage gates and dealbreakers, sales methodology and pricing	Train sales teams so they can move prospects through the sales funnel faster	Deck & Video
Solution Brief & Overview video	Prospect	Aware	2-page high-level PDF with an overview of the solution/benefits, quotes from customers & light technical	Generate enough interest to move the prospect to the Discovery stage	2 page PDF & Overview video
Email Templates	Prospects	All stages	5 email templates of 3-5 sentences with CTA in each that engage the audience	for sales teams to use throughout the stages of the funnel to move prospects through faster	3-5 sentences

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Case Studies	Prospects	Discovery/Interested, Investors	2-3 Page PDF that illustrates a customer use case or success story	Validate that we work in the market, and that prospects can trust us enough to move to the next stage in the funnel	2-3 page PDF
Technical Brief	Prospect	Discovery/Interested	4-6 page PDF that details out the technical stack, requirements for the customer and benefits	Get through the IT gatekeeper	4-6 page PDF with diagram
Demo Script	Prospect	Discovery/Interested	15minute demo script +additional discovery questions	Move the prospect to Proposal	PDF
Proposal Template	Prospect	Proposal	Benefits of the solution, an Order form with discounts & T&C's	Move to Contract	PDF
Contract	Prospect	Contract	Proposal + Signature & terms	Move to Closed Won	PDF
Implementation Plan	Customer	Close	A project plan that outlines customer and company responsibilities to get the product live at all of their sites	Go Live	Spreadsheet