

SAMPLE DELIVERABLE — PREPARED BY TEYSHA

Nova Sales Playbook

Your ally in scalable sales success —

the complete, repeatable framework behind Nova's sales motion, built to run without the original rep in the room.

Nova is a fictional example company used to illustrate the structure and depth of a Teysha engagement deliverable. No client-confidential material appears in this document.

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FOUNDATIONS

How to use this playbook

This is a sample of the kind of playbook produced during the **Build** phase of a Teysha engagement. It's built around Nova, a fictional B2B SaaS company selling workflow automation software, to illustrate structure and depth without exposing any real client's proprietary process.

A real engagement playbook is calibrated to the client's actual buyers, product, deal history, and team size — this sample shows the shape and depth that document takes, not a fill-in-the-blank template.

Who this is for

Every AE on the team, from first day to tenured rep — this is the shared source of truth for how Nova sells, not tribal knowledge that lives in one person's head.

How it's organized

Seven sections, moving from who we sell to, through how a deal actually runs stage by stage, into the specific frameworks (discovery, objections, negotiation) used inside those stages, and finally the operating details — metrics, tools, and how a new rep gets ramped.

FOUNDATIONS

Nova at a glance

A one-page orientation for anyone new to the account — what Nova sells, who buys it, and why deals are won or lost.

The product

Nova is workflow automation software for mid-market operations teams — it replaces manual, spreadsheet-driven processes with automated routing, approvals, and reporting.

Why customers buy

Not for the software itself, but for what stops happening once it's in place: fewer dropped handoffs between departments, less time spent chasing approvals, and a clear audit trail when something goes wrong.

Why deals are lost

- Champion can't get budget approved because the cost-of-inaction case was never quantified
- Technical evaluator stalls the deal over integration questions that were never addressed early
- Deal drags past a champion's internal urgency window and goes cold

FOUNDATIONS

Ideal customer profile & segmentation

Not every company that could use Nova is a good fit for how Nova sells today. Segmentation keeps reps focused on the accounts most likely to close and expand.

Tier	Company Size	Signal	Motion
Tier 1 — Core ICP	150–1,500 employees	Ops team of 5+, currently using spreadsheets or a legacy tool	Full-cycle AE-led
Tier 2 — Expansion	1,500+ employees	Existing customer in another department or business unit	AE-led, CS-assisted
Tier 3 — Opportunistic	Under 150 employees	Inbound only; rapid growth signal (funding, hiring spike)	Lightweight, high-velocity

BUYER PERSONAS

Personas overview

Nova sells to mid-market operations teams. Most deals involve three roles, each with a different definition of a 'good' outcome. The next three pages go deep on each.

Persona	Role in the Deal	Primary Concern	What Wins Them Over
The Operator	Economic buyer / champion	Team is drowning in manual work; needs relief fast	A live demo using their own workflow, not a generic one
The Evaluator	Technical validator	Integration risk, data security, implementation lift	A clear technical walkthrough and a named implementation contact
The Approver	Budget holder	ROI clarity, risk of the status quo vs. risk of change	A simple, defensible cost-of-inaction case, not a feature list

BUYER PERSONAS

The Operator

Role: Economic buyer / champion | **Typical Titles:** Director or Manager of Operations

Runs the team that feels the pain of the current process every day. Usually the first call, and the one who has to sell the deal internally after we leave the room.

What they want

- Get their team out of manual, error-prone busywork
- Be able to report on process health without pulling numbers by hand
- Look good to their own boss by fixing something visibly broken

What they're afraid of

- Losing more budget on a tool that becomes shelfware like the last one
- Rolling this out and having their team resist adopting it
- Being blamed if implementation goes badly

What wins them over

- Speak in their day-to-day language, not feature names
- Show their actual workflow in the demo, not a canned one
- Give them something concrete they can forward to their boss unprompted

Common mistakes reps make with this persona

- Talking product roadmap before understanding their current process
- Assuming they have the authority to sign without an Approver

BUYER PERSONAS

The Evaluator

Role: Technical validator | **Typical Titles:** IT Manager, Systems Admin, or a senior Ops team member

Doesn't own the budget but can kill the deal. Brought in once the Operator is interested, to assess whether this is safe and feasible to implement.

What they want

- Confirm the tool won't break existing systems or create security exposure
- Understand real implementation effort, not a marketing estimate
- Avoid inheriting a support burden nobody accounted for

What they're afraid of

- Signing off on something that causes an incident down the line
- Discovering integration gaps after the contract is signed
- Being the one who has to explain a failed rollout

What wins them over

- Bring a real technical resource to the call, not just the AE
- Answer security and integration questions directly, without deflecting to 'we'll cover that later'
- Provide a named implementation contact, not a generic support email

Common mistakes reps make with this persona

- Letting this call slip to the very end of the cycle
- Treating their questions as a formality instead of genuine risk assessment

BUYER PERSONAS

The Approver

Role: Budget holder | **Typical Titles:** VP of Operations, COO, or Finance stakeholder

Rarely in the room until late. Cares about the business case, not the product. Needs a reason this is more urgent than the dozen other requests on their desk.

What they want

- Understand the cost of doing nothing, not just the cost of Nova
- See a credible number, not an inflated ROI claim
- Trust that the Operator has actually vetted this, not just liked a demo

What they're afraid of

- Approving spend that doesn't get used or adopted
- Being sold a story that doesn't hold up under their own scrutiny
- Setting a precedent for approving tools without rigor

What wins them over

- Lead with the cost-of-inaction case, built with the Operator ahead of time
- Keep the pitch short — they are evaluating judgment, not sitting through a demo
- Let the Operator present the case with us in support, not instead of them

Common mistakes reps make with this persona

- Presenting a generic ROI template that wasn't built with their actual numbers
- Skipping this persona and hoping the Operator carries it alone

Process overview

Six stages, each with a clear entry point and exit criteria. A deal doesn't advance on optimism — it advances when its exit criteria is actually met. The following pages go stage by stage.

Stage	Goal	Exit Criteria
1. Prospect	Self-source a qualified conversation	Confirmed meeting with a role matching a target persona
2. Discovery	Understand the real problem and its cost	Pain, impact, and buying process are all documented
3. Demo	Show the solution mapped to their discovery	Technical validator confirms fit; next steps scheduled
4. Business Case	Build the case the champion can defend internally	Champion has a document they can send without us in the room
5. Negotiation	Align terms with both sides' real constraints	Verbal agreement on price, term, and start date
6. Handoff	Transfer context so onboarding starts warm	CS has a written account summary before kickoff

Stage 1: Prospecting

Goal: Self-source a qualified conversation with a role matching a target persona.

Key activities

- Multi-channel outbound: LinkedIn, cold call, and personalized email, sequenced together rather than run in isolation
- Referrals from existing champions moving to new companies — tracked deliberately, not left to chance
- Inbound follow-up within one business hour, before the lead goes cold

What good looks like

- A cold call opener that names the specific problem tier this account likely has, not a generic pitch
- Email subject lines that reference something true about their business, never a generic template
- A maximum of 8 touches across 3 weeks before moving the account to nurture

Common mistake

Booking a meeting with a title that doesn't match any persona just to hit an activity number

Stage 2: Discovery

Goal: Document pain, impact, and buying process — not just 'had a good call.'

Key activities

- A 30-minute call structured around the four-layer discovery framework (see the Running the Deal section)
- Notes logged in the CRM the same day, in the buyer's own language, not paraphrased jargon
- A second discovery touch with a different stakeholder if only one persona has been reached so far

What good looks like

- Get a number attached to the pain before the call ends — hours, dollars, or missed revenue
- Ask who else needs to agree before this is a signed deal, and get names
- Never move to a demo until at least the Operator's pain and impact are documented

Common mistake

Running a demo before discovery because the prospect asked for one — a demo without discovery is a guess

Stage 3: Demo

Goal: Confirm technical fit and earn a scheduled next step.

Key activities

- Recap of discovery findings before any screen is shared
- A live walkthrough using the buyer's actual workflow, not a canned demo script
- The Evaluator present, or a technical follow-up scheduled before the call ends

What good looks like

- Never open with a feature tour — open with their own words played back to them
- Stop and ask directly: does this solve what you described?
- Leave with a named next step and a date, never 'I'll follow up'

Common mistake

Demoing every feature instead of only the ones tied to documented pain

Stage 4: Business Case

Goal: Give the champion something they can defend without us in the room.

Key activities

- A one-page cost-of-inaction summary, built together with the Operator, not handed to them finished
- Numbers the champion has personally validated, not our estimate alone
- Review the case live with the champion before it goes to the Approver

What good looks like

- Build it with the champion present — a case they didn't help build, they won't defend under pressure
- Keep it to one page; the Approver's attention window is short
- Anchor to a business goal the Approver already cares about, not a Nova feature

Common mistake

Sending a generic ROI template and hoping the numbers are close enough

Stage 5: Negotiation

Goal: Reach verbal agreement on price, term, and start date.

Key activities

- Confirm budget range earlier in the cycle so this stage isn't the first pricing conversation
- Use the guardrails in the Negotiation Guardrails section rather than improvising discount levels
- Document every agreed term in writing within 24 hours of the call

What good looks like

- Trade concessions for something, never give one for free
- If price is the objection, revisit the business case before touching the discount
- Get a specific start date agreed before drafting the contract

Common mistake

Offering a discount before understanding what's actually driving the pushback

Stage 6: Handoff

Goal: Transfer context so Customer Success starts the relationship warm, not cold.

Key activities

- A written handoff document (template in the Closing & Beyond section) completed before kickoff
- A joint call with the champion, the AE, and the CS owner — not an email introduction alone
- Open items and expectations set during the sales cycle carried forward explicitly

What good looks like

- Never let a customer's first CS interaction be them re-explaining their own problem from scratch
- Flag any promises made during the cycle so CS isn't caught off guard
- Confirm the champion knows who to contact starting day one

Common mistake

Treating handoff as an afterthought after the contract is signed

Account tiering & territory planning

Not all accounts in a territory deserve equal time. Reps tier their book quarterly so effort tracks to opportunity size, not just to whoever answers the phone first.

Tier	Criteria	Weekly Touch Cadence
A — Active Opportunity	Discovery completed or in progress	2–3 touches, high-touch
B — Qualified, Not Engaged	Fits ICP, no live conversation yet	1 touch, sequence-driven
C — Long-Term Nurture	Fits ICP but no urgency signal	Monthly, low-effort

Outbound cadence framework

A structured multi-touch sequence, run consistently rather than reinvented per account.

Day	Channel	Purpose
Day 1	Personalized email	Reference something specific and true about their business
Day 1	LinkedIn connection request	No pitch — just a note referencing shared context
Day 3	Cold call	Open with the problem tier, not a product pitch
Day 5	Email — proof point	Share a relevant outcome, not a generic case study blast
Day 8	LinkedIn message	Follow up on the connection with a specific, short question
Day 12	Cold call + voicemail	Reference all prior touches so it doesn't feel like touch one
Day 17	Breakup email	Direct, low-pressure close-out that often revives replies

Messaging pillars

Every outbound message ties back to one of three pillars — never a generic feature pitch.

Manual work is a hidden tax

Time spent on manual processes is time not spent on higher-value work — quantify it, don't just name it.

Errors compound downstream

A dropped handoff early in a process gets more expensive to fix the further downstream it's caught.

Visibility is the real gap

Most teams don't lack effort — they lack a reliable way to see where things stand without chasing people.

Discovery question bank

Four layers, worked through in every first call. A deal doesn't move to Demo until all four are documented.

Situation

- Walk me through how this process works today, step by step.
- Who touches this process, and how often?
- What tools or spreadsheets are involved right now?

Pain

- Where does this break down most often?
- What's the visible symptom your team complains about most?
- When was the last time this caused a real problem — what happened?

Impact

- How many hours a week would you estimate this costs your team?
- Has this ever caused a missed deadline, an error that reached a customer, or lost revenue?
- If nothing changes, what does this look like in six months?

Vision & Buying Process

- What would 'fixed' actually look like to you?
- Besides you, who else would need to agree this is worth doing?
- What's driven past decisions like this to stall out?

Qualification framework

A shared, written definition of a good deal — so pipeline reviews are about facts, not gut feel.

Signal	Strong	Weak
Champion	Has lost sleep over this problem; proactively sells internally	Polite, responsive, but never brings it up unprompted
Pain	Quantified in hours or dollars, tied to a business goal	Described in vague, general terms only
Process	Buying steps and approvers are named and confirmed	Champion is guessing at their own approval process
Timeline	Tied to an external deadline or event	'Sometime this year' with no forcing function
Competition	We know what else is being evaluated, if anything	Unknown — could be losing to 'do nothing'

Demo environment & flow

Before the call

- Load a demo environment configured to resemble their actual workflow, not the generic default
- Confirm who's attending and whether the Evaluator will be present
- Prepare one proof point relevant to their industry or company size

During the call

1. Recap: restate the pain and impact in their language, and confirm it's still accurate
2. Bridge: connect that specific pain to the part of the product that addresses it — skip everything else
3. Show: walk the workflow using their scenario, not a generic demo environment
4. Confirm: ask directly whether what they just saw solves what they described
5. Next step: leave with a specific, named next step and a date — never 'I'll follow up'

Competitive positioning

Nova is typically evaluated against two kinds of alternatives: legacy manual processes, and point-solution competitors. Positioning differs by which one we're up against.

Alternative	Their Pitch	Our Position
Status quo (spreadsheets)	"It's free, we already know it."	The real cost isn't the tool — it's the hours and errors the current process already causes
Point-Solution Competitor A	Cheaper, narrower feature set	We solve the adjacent problems that force them into a second tool later
Point-Solution Competitor B	Deeper feature set, longer implementation	Faster time to value — most teams are live within two weeks, not two quarters

Objection handling

Objections cluster into a handful of categories. Reps learn the category, not a script — so responses hold up even when the exact wording doesn't match a rehearsed line.

Category	What It Sounds Like	Response Pattern
Price	"This is more than we budgeted for."	Reconnect price to the cost of the problem staying unsolved, not to feature count
Timing	"Let's revisit this next quarter."	Ask what changes between now and then — often nothing does, and that's worth naming
Trust	"We tried something like this before and it didn't work."	Get specific about what failed last time before claiming this is different
Authority	"I need to check with my team."	Offer to join that conversation directly rather than waiting on a relay
Feature Gap	"You don't have [X] like Competitor A."	Confirm how often that feature is actually used before conceding the gap matters

Business case & ROI framework

Built with the champion, not for them — a case they didn't help build, they won't defend under pressure from their own Approver.

Input	Example (Illustrative Only)
Hours/week on manual process	12 hours across the team
Fully-loaded hourly cost	\$45/hour blended
Annual cost of current process	$12 \times 45 \times 50 \text{ weeks} = \$27,000$
Cost of Nova (annual)	\$18,000
Net first-year impact	\$9,000 saved, before error-reduction value

Note: these figures are illustrative placeholders for the sample only. A real business case uses numbers the champion has personally validated.

Negotiation guardrails

Discount authority is tiered so reps aren't improvising concessions deal by deal.

Discount Level	Approval Needed	When It's Appropriate
Up to 10%	AE discretion	Multi-year commitment or annual prepay
11–20%	Sales Lead approval	Competitive displacement with verified alternative pricing
21%+	Leadership approval	Strategic logo or expansion-potential account only

Guardrail: never lead with a discount before understanding what's actually driving the pushback — price objections are frequently a proxy for an unresolved business-case gap.

CLOSING & BEYOND

Mutual close plan template

Shared with the champion once a deal enters Negotiation — a joint checklist so both sides know exactly what's left before signature.

Milestone	Owner	Target Date
Final pricing confirmed	AE + Approver	[Date]
Legal/security review complete	Evaluator + Nova	[Date]
Contract redlines resolved	Both parties	[Date]
Signature	Approver	[Date]
Kickoff call scheduled	AE + CS	[Date]

Handoff document

Completed by the AE before kickoff — so the customer never has to re-explain their own problem from scratch to a new face.

Fields captured

- Champion, Evaluator, and Approver names, roles, and communication preferences
- The original pain and impact documented in discovery, in the customer's own words
- Any commitments or promises made during the sales cycle
- Known risks or open concerns raised during evaluation
- Success criteria the customer defined for themselves

Deal qualification scorecard

The same scorecard from the Qualification Framework section, used as a standing pipeline review tool — every open deal is scored against it weekly.

Signal	Strong	Weak
Champion	Actively sells internally without prompting	Responsive only when contacted
Pain	Quantified and tied to a business goal	Vague or unconfirmed
Process	Approvers named and buying steps confirmed	Unclear who else is involved
Timeline	Tied to an external deadline	No forcing function

KPIs & metrics

What Nova AEs are actually measured on, week to week and quarter to quarter.

Metric	Cadence	Why It Matters
Self-sourced pipeline generated	Weekly	The leading indicator — nothing downstream happens without this
Discovery-to-Demo conversion	Monthly	Flags whether discovery is being rushed or skipped
Average sales cycle length	Quarterly	Watches for deals stalling in Business Case or Negotiation
Win rate against qualified pipeline	Quarterly	The real scoreboard — everything else is a leading signal

Tech stack

The tools every Nova AE is expected to use daily, and what each one is actually for.

Tool	Purpose
CRM	System of record — every discovery note and stage change lives here, not in a personal notebook
Sequencing platform	Runs the outbound cadence consistently across the whole team
Call recording	Coaching and QA — not surveillance, used in weekly 1:1 reviews
Proposal / e-signature tool	Standardizes contract generation so terms match what was agreed verbally

RUNNING THE TEAM

New AE onboarding: 30/60/90

Window	Focus	Milestone
Days 1–30	Product, persona, and process fluency; shadow calls	Can run a discovery call solo by day 30
Days 31–60	Full-cycle ownership on smaller accounts, coached demos	First self-sourced opportunity in Demo stage
Days 61–90	Independent full-cycle execution	First closed-won deal, or a clear, coached path to one

APPENDIX

Quick reference card

A one-page cheat sheet — printed or pinned, not buried in a slide deck nobody reopens.

The four discovery layers

Situation → Pain → Impact → Vision & Buying Process

The three personas

The Operator (champion) · The Evaluator (technical) · The Approver (budget)

The six sales stages

Prospect → Discovery → Demo → Business Case → Negotiation → Handoff

Before every demo, ask yourself

Have I documented pain and impact? Is the Evaluator in the room? Do I know the next step I'm asking for before I open my mouth?

THIS IS A SAMPLE

Your playbook won't look like this.

It'll be built around your actual buyers, your actual deal history, and the gaps an audit of your current process actually finds — not a generic template.

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