

[Template]

Education Sales Playbook

SALES ENABLEMENT

K-12 & HIGHER ED

REPEATABLE MOTIONS

Play Overview

Every play begins with a clear identity. Before running any outreach, document the core details that define the play's purpose, scope, and urgency. This ensures reps and managers share a common understanding of what the play is designed to accomplish and why it matters right now.

Play Identity

- **Play name:** [Enter name]
- **Version / last updated:** [Date]
- **Owner:** [Name or team]

Strategic Context

- **Primary goal:** [Define the outcome]
- **Segment:** [K-12 / Higher Ed / Both]
- **Use case summary:** [Brief description]

Market Urgency

- **Why this play matters now:** [Describe the current market condition, funding cycle, or initiative driving urgency for this play]

- ① Keep each play focused on a single, repeatable scenario. Avoid combining multiple motions into one document—create separate plays for each distinct trigger or segment.

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Market Urgency

- **Why this play matters now:**

Account Triggers

Document the signals that determine when this play should be activated. Prioritize signals tied to funding, program alignment, timing, and buying readiness. Strong trigger identification is what separates a well-run play from random outreach—it ensures reps engage accounts at the right moment with the right message.

Institutional Profile

- **Institution type:** [District / University / Community College]
- **Geography / region:** [Target area]
- **Enrollment range:** [e.g., 5,000–20,000 students]
- **Existing customer status:** [New logo / Expansion / Renewal]

Activation Signals

- **Funding signals:** [e.g., ESSER, Title I, state grants]
- **Program or initiative signals:** [e.g., new STEM initiative, DEI program launch]
- **Leadership or staffing signals:** [e.g., new superintendent, CTO hire]
- **Timing signals:** [e.g., budget cycle, RFP window]
- **Other qualifiers:** [Any additional criteria]

Contact Targets

List the roles that should be included in outreach for this play, based on the likely buying committee and implementation team in the target segment. Education buying decisions are rarely made by a single person—multi-threading across the right roles is essential to moving opportunities forward and reducing single-point-of-failure risk.



Primary Buyer Roles

The individuals with budget authority and final decision-making power. Document specific titles relevant to your segment.



Influencer Roles

Stakeholders who shape the evaluation criteria and champion the solution internally without holding final approval.



Approver Roles

Legal, procurement, or board-level contacts who must sign off before a deal can close. Engage early to avoid late-stage delays.



Implementation Roles

IT directors, curriculum coordinators, or department heads who will own the rollout. Their buy-in reduces post-sale churn risk.

⚠ Roles to avoid or deprioritize: Document contacts who create noise without advancing the deal—e.g., roles without budget influence or those known to block vendor conversations.

Contact Targets



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Objectives & Success Metrics

Define the business outcome this play is intended to drive, along with the leading and lagging indicators used to evaluate performance. Clear metrics allow managers to coach reps effectively and enable the team to identify when a play needs to be revised or retired.

Primary Outcome

[Define the single most important result this play should produce—e.g., net new pipeline from Title I districts, expansion ARR from existing higher-ed accounts.]

Leading Metrics

- **Meetings booked:** [Target number per rep per period]
- **Multi-threaded contacts engaged:** [Minimum contacts per account]
- **Qualified opportunities created:** [Target volume]

Lagging Metrics

—%

Win Rate

Target win rate for this play

— days

Avg. Sales Cycle

Expected cycle length

\$—

Avg. Deal Size

Or expansion value target

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—%

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Or expansion value target

Stakeholder Map

Map each key role in the buying committee to their core concern, the message they need to hear, and the desired next step. A well-built stakeholder map helps reps personalize outreach, anticipate objections, and advance the right conversation with the right person at the right time.

Role / Title	Core Concern	What This Person Needs to Hear	Desired Next Step
[e.g., Superintendent]	[e.g., Budget accountability, board optics]	[e.g., ROI evidence, peer district outcomes]	[e.g., Executive briefing]
[e.g., CTO / IT Director]	[e.g., Integration, security, support]	[e.g., Technical specs, implementation timeline]	[e.g., Technical discovery call]
[e.g., Curriculum Director]	[e.g., Student outcomes, teacher adoption]	[e.g., Pedagogy alignment, ease of use]	[e.g., Demo with instructional team]
[e.g., Procurement / CFO]	[e.g., Contract terms, compliance]	[e.g., Pricing structure, legal standards]	[e.g., Proposal review meeting]

Stakeholder Map

Role / Title	Core Concern	What This Person Needs to Hear	Desired Next Step

Play Sequence

Document the recommended flow from first touch through opportunity progression. Keep the sequence practical and easy for reps to run consistently. Each step should have a clear owner, target role, channel, action, and exit criteria so reps know exactly when to advance to the next stage.

Step 1

- **Name:** [e.g., Trigger Identification]
- **Owner:** [Rep / SDR]
- **Target role(s):** [Primary buyer]
- **Channel(s):** [Email / LinkedIn]
- **Action:** [Describe outreach]

- **Exit criteria:** [e.g., Reply received]

Step 2

- **Name:** [e.g., Discovery Call]
- **Owner:** [AE]
- **Target role(s):** [Buyer + Influencer]
- **Channel(s):** [Phone / Video]
- **Action:** [Run discovery]

- **Exit criteria:** [e.g., Pain confirmed]

Step 3

- **Name:** [e.g., Demo / Proposal]
- **Owner:** [AE + SE]
- **Target role(s):** [Full committee]
- **Channel(s):** [Video / In-person]
- **Action:** [Deliver tailored demo]

- **Exit criteria:** [e.g., Proposal requested]

Step 4

- **Name:** [e.g., Close / Procurement]
- **Owner:** [AE]
- **Target role(s):** [Approver / Procurement]
- **Channel(s):** [Email / Call]
- **Action:** [Navigate contract process]

- **Exit criteria:** [e.g., PO received]

Play Sequence



Step 1

- **Name:**
- **Owner:**
- **Target role(s):**

- **Channel(s):**
- **Action:**

- **Exit criteria:**



Step 2

- **Name:**
- **Owner:**
- **Target role(s):**

- **Channel(s):**
- **Action:**

- **Exit criteria:**



Step 3

- **Name:**
- **Owner:**
- **Target role(s):**

- **Channel(s):**
- **Action:**

- **Exit criteria:**



Step 4

- **Name:**
- **Owner:**
- **Target role(s):**

- **Channel(s):**
- **Action:**

- **Exit criteria:**

Messaging Framework

Capture the core narrative, proof points, and discovery prompts that make this play repeatable across reps and territories. Consistent messaging ensures every rep tells the same compelling story regardless of region or experience level. Pair this with prepared objection responses to reduce deal stall and increase rep confidence.

Core Narrative

[Write the 2-3 sentence story that connects the institution's challenge to your solution and the outcome they can expect. This should be conversational and specific to the play's segment.]

Proof Points

[Case study or data reference]

[Supporting evidence or benchmark]

Top Value Points

[Value point 1]

Value point 2]

[Value point 3]

Discovery Questions

[Question 2—qualify funding/timing]

[Question 3—identify stakeholders]

Messaging Framework

Core Narrative

Proof Points

Top Value Points

Discovery Questions

Objection Handling

Objection	Likely Source	Recommended Response	Supporting Asset
[e.g., "We don't have budget."]	[Buyer / Procurement]	[e.g., Reference funding sources like ESSER or Title I that align to this use case]	[Funding guide]
[e.g., "We're happy with our current vendor."]	[IT / Curriculum]	[e.g., Acknowledge relationship, introduce differentiated value and migration support]	[Competitive one-pager]
[e.g., "This isn't a priority right now."]	[Superintendent]	[e.g., Tie to an active initiative or upcoming deadline to create urgency]	[ROI calculator]

Objection Handling

Objection	Likely Source	Recommended Response	Supporting Asset

Data, Assets & Qualification Rules

Specify which data fields, insight sources, and enablement assets should be pulled into this play—and document the rules that determine when to advance, pause, recycle, or stop. Qualification discipline keeps pipeline clean and ensures reps invest time in accounts most likely to close.

Data & Assets

- **Data fields:** [e.g., enrollment, funding type, tech stack]
- **Institution views:** [Recommended filters or segments]
- **Case studies:** [Relevant customer stories]
- **Decks / one-pagers:** [Link or title]
- **Blogs / guides / webinars:** [Supporting content]
- **Internal tools:** [e.g., ROI calculator, pricing tool]

Qualification Signs

- [e.g., Confirmed funding source identified]
- [e.g., Active initiative aligned to use case]
- [e.g., Decision-maker engaged and responsive]
- [e.g., Timeline within current or next fiscal year]

Exit/Disqualification

- **Red flags:** [e.g., No budget path, multi-year contract with competitor]
- **Recycle criteria:** [e.g., Re-engage at next budget cycle or leadership change]
- **Disqualification criteria:** [e.g., Enrollment below threshold, out-of-scope use case]

- ☑ Well-defined qualification rules protect rep time and improve forecast accuracy. When in doubt, recycle rather than disqualify—education buying cycles are long and conditions change.

Data, Assets & Qualification Rules

Data & Assets

- **Data fields:**
- **Institution views:**
- **Case studies:**
- **Decks / one-pagers:**
- **Blogs / guides / webinars:**
- **Internal tools:**

Qualification Signs

Exit/Disqualification

- **Red flags:**
- **Recycle criteria:**
- **Disqualification criteria:**

Field Notes, Review Cadence & Quick Reference

Use the field notes section to capture rep feedback, customer language, and patterns that should influence future updates to the playbook. The most valuable playbooks are living documents—updated regularly based on what's actually happening in the field, not just what was true at launch.

Notes from the Field

- **What worked:** [Rep observations]
- **What did not work:** [Gaps or friction points]
- **New objections heard:** [Emerging pushback]
- **New signals observed:** [Market or buyer shifts]
- **Recommendations for revision:** [Suggested changes]

Review Cadence

- **Review frequency:** [e.g., Quarterly]
- **Next review date:** [Date]
- **Review owners:** [Names / roles]
- **Metrics to review:** [Win rate, cycle length, deal size]
- **Changes made in this version:** [Summary of updates]

Quick-Reference Summary

Play name	[Enter]
Segment	[K-12 / Higher Ed]
Trigger	[Primary activation signal]
Primary buyer	[Role / title]
Core message	[One-sentence value statement]
Main CTA	[e.g., Book a discovery call]
Success metric	[Primary KPI]
Review date	[Next scheduled review]

Field Notes, Review Cadence & Quick Reference

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Turn data insights into repeatable motions your whole team can run.

Ready to turn education data into plays your reps can run every day? Connect with Agile for the market insights you need to build data-driven sales playbooks that reflect how K-12 and Higher-Ed institutions actually buy.

Connect with an Expert

