PipelineSync

FREE TEMPLATE · SALES ENABLEMENT

HubSpot Sales Playbook Template

Plan every playbook before you build it in HubSpot: when reps use it, the sections in order, each question and the property it writes, objection handling, meeting prep and whether the team actually uses it. Reference pages, a worked example and fillable worksheets.

Playbook builder | Questions | Objection handling | Adoption tracker

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Fillable PDF · pipelinesync.net/resources

START HERE

How to use this template

A playbook is useful when it follows the real conversation and asks only questions someone uses afterwards. This template makes you decide both before you build, and then checks whether reps actually open it.

1 Check your plan
Confirm playbooks and the answer types you need are in your subscription (pages 3 and 4).

2 List every playbook
One row per playbook in the inventory, before you write new ones (page 6).

3 Write the brief and sections
Purpose, moment, record type, logging and sections in order (pages 9 and 10).

4 Write the questions
Answer type and the property each one writes (page 11).

5 Prepare the conversation
Objection handling and a meeting prep sheet for each call (pages 12 and 13).

6 Roll out and review
Train, track adoption monthly and review content quarterly (pages 14 and 15).

What is inside

Page	Section	Use it to
03	**Reference: plans, seats and sharing**	Check who can create, use and share playbooks
04	**Reference: building and logging**	Answer types, settings, logging and usage reporting
05	**Standards: what makes a playbook work**	Agree naming, length and question rules
06	**Playbook inventory**	Record every playbook, its moment, owner and status
07–08	**Worked example: discovery call**	See a complete, made-up discovery call playbook
09	**Playbook brief**	Plan one playbook before you build it
10	**Sections and talking points**	Lay out the conversation in order, with timings
11	**Questions worksheet**	Write each question, its answer type and property
12	**Objection handling**	Prepare what to ask and say for each objection
13	**Meeting prep sheet**	Prepare for one sales meeting and log it after
14	**Rollout and adoption tracker**	Launch the playbook and track use by team
15	**Quarterly review and change log**	Keep content current and every change explained

Tip: Every worksheet is fillable in Acrobat Reader, Preview or your browser, or print it. Copy the brief, sections and questions pages for each playbook. A spreadsheet version is on the template page at pipelinesync.net.

REFERENCE · CHECKED OCTOBER 2026

Plans, seats and sharing

> Playbooks are guided content reps open on a record during a call or meeting. They need Sales Hub or Service Hub Professional or Enterprise, and an assigned Sales or Service seat to create, edit, view and delete them. HubSpot provides a Discovery Call and a Qualification playbook by default to start from.

Who can do what

Task	What HubSpot requires (October 2026)
Create, edit, view and delete	An assigned Sales or Service seat
Create playbooks	Playbooks permissions; the permissions guide lists View, Edit and Publish access
Use playbooks without playbook permissions	Users with Sales or Service seats can still view and use them in the tool and on records
Delete another user's playbook	Super Admins only
Super Admins viewing playbooks	Also need a paid Sales or Service Hub Professional or Enterprise seat
Number of playbooks	Depends on your subscription; HubSpot points to its Product & Services catalog and gives no number in the knowledge base

Sharing

01
Only me
Private draft

→

02
Specific users and teams
Super Admins or Sales / Service seats

→

03
Everyone
Whole account

Limiting access to playbooks, documents, sequences or templates needs Sales Hub or Service Hub Professional or Enterprise. Super Admins with Sales or Service seats can access all sales content.

Where reps open them

- The right panel of contact, company, deal, ticket and custom object records
- Lead records, in the sales workspace or leads summary
- A Playbooks tab in the Google Meet and Zoom integrations

Plan changes

- Downgrading from Sales Hub or Service Hub Enterprise: playbooks are no longer accessible from records; logged activities stay on the timeline
- Playbooks are fully supported when copying to a sandbox
- Sensitive Data is not supported in playbooks

REFERENCE · CHECKED OCTOBER 2026

Building, logging and reporting

You build a playbook in CRM > Playbooks from scratch or a template, adding text, links, snippets, videos and questions. When the rep logs it, HubSpot records the engagement, Call by default, and can write answers to properties. The Analyze tab shows how often each playbook is viewed and logged.

Question answer types

Answer type	What it does	Plan as HubSpot's page states it
Open text	Free-text answer the rep types	Every plan with playbooks
List of answer options	The rep picks from options you set	Sales Hub Enterprise only
Update a property	Writes the answer to a contact, company, deal or ticket property	The page says Enterprise in one place and Professional or Enterprise in another: check your account

Each question can be Required, restricted to a single answer, or hide the notes field. If several questions update the same empty property, only the last answer is saved. HubSpot doesn't document which property types questions support.

Content and settings

- Content: links, images, knowledge base articles, snippets, questions, personalization tokens, videos, embeds, and actions to schedule a meeting or create a record.
- Settings: Log playbook submissions; engagement type defaults to Call, with a default call or meeting type.
- Recommendations: rules on company, contact, deal or ticket properties; Super Admins can add a Recommended Enablement card.
- Version history, clone, unpublish, folders and Manage sharing.

Logging a playbook

- Everything entered is autosaved as a draft until the rep clicks Log.
- An outcome can only be chosen in call playbooks; meetings use the meeting type.
- You can attach an engagement logged within the last six hours.
- An optional follow-up task can be created.
- Up to 30 custom call outcomes can be used when logging.

Reporting and automation

Where	What you get
Analyze tab	Total playbook usage and team adoption: number of playbooks, total views, total active users; user data on views and logs; per-playbook usage and users
Playbook log workflow trigger	Enrolls a record when a playbook is logged on it, in all workflow types
Not documented	Export of playbook usage, custom report support and any AI features for playbooks

STANDARDS

What makes a playbook work

Reps use a playbook when it saves them effort in the moment and the answers go somewhere useful. The rules below are general good practice from building sales processes, not HubSpot requirements. Agree your own and apply them to every playbook.

Playbooks reps skip, and playbooks reps use

Usually skipped	Usually used
A long script to read word for word	Short prompts in the order of the conversation
Twenty questions for every call	Five to ten questions, each with a reason
Answers that stay in notes nobody reads	Key answers written to properties that reports use
One playbook for every situation	One playbook per moment: discovery, demo, renewal
Written once, never updated	Owned, reviewed every quarter, changes announced

RECOMMENDED NAME PATTERN

Team | Moment | Segment

Example: **Sales | Discovery call | New business** · **Sales | Demo | Mid-market** · **Service | Renewal call | All**

Your standards

Name pattern	
Most questions per playbook	
When a question writes a property	e.g. only if a report, workflow or handoff uses the answer
Who approves new playbooks	
Where content lives	e.g. snippets for repeated text, documents for files, one folder per team
Review cycle	e.g. every quarter, and after any change to the sales process
Agreed by / date	

- [ ] Every playbook has one owner
  Who keeps the content current
- [ ] Every playbook ends with a next step
  Booked before the call ends
- [ ] One question per property
  Only the last answer is saved otherwise
- [ ] Changes go in the change log
  Page 15

WORKSHEET

Playbook inventory

One row per playbook, including HubSpot's default Discovery Call and Qualification playbooks if you use them. Fill this in before writing new playbooks and update it at every quarterly review.

ID	Playbook name	Purpose	Use it when	Record	Logged as	Writes props	Owner	Shared with	Status	Reviewed
PB-01	*Sales | Discovery call | New business*	*Run every first call the same way*	*First call with a new prospect*	*Deal*	*Call*	*Yes*	*Sales manager*	*Sales team*	*Live*	*2026-10*

Record: Contact, Company, Deal, Ticket, Custom object. Logged as: Call, Meeting, Not logged. Shared with: Only me, Everyone, Specific users and teams. Status: Planned, Drafting, Live, Unpublished, Retire.

WORKED EXAMPLE · ILLUSTRATIVE · 1 OF 2

Sales | Discovery call | New business

A made-up discovery call playbook for a team selling to new customers. Your sections and questions will differ; the point is how much is decided before anyone builds it.

Purpose	Run every first call the same way and leave with a booked next step and the qualification recorded on the deal.
Use it when	The first call with a new prospect, after a meeting is booked
Do not use it when	Renewals or expansions (separate playbook), or partner referrals with a call already held
Record type and logging	Opened on the deal; logged as a Call with the call type Discovery
Recommended when	Deal stage is Discovery booked
Properties written	Team size and Primary pain (example custom deal properties)
Owner and sharing	Sales manager · Specific users and teams: Sales team
Success measure	Qualified deals with both properties filled, and a next meeting booked from most discovery calls

Sections, in order

3 min
Open and agenda
Agree the outcome

→

8 min
Current situation
How they work today

→

10 min
Problem and impact
What it costs them

→

6 min
Decision process
Who, how, when

→

3 min
Next step
Book it live

Section	Goal	Talking points
Open and agenda	Agree time and outcome	Thank them, confirm the time, state the agenda, ask what they want to leave with
Current situation	Understand how they work today	Process, tools, team size; listen for workarounds
Problem and impact	Find a problem worth solving	What breaks, how often, what it costs; get their words, not yours
Decision process	Know who decides and how	People, steps such as security or legal review, the date they need it by
Next step	Leave with a booked meeting	Summarize in two sentences, propose the next meeting with the people named, book it

All content on this page is made up for illustration.

WORKED EXAMPLE · ILLUSTRATIVE · 2 OF 2

Discovery call: questions and logging

Q	Section	Question	Answer type	Property	Listen for
1	Open	What would make this call a good use of your time?	Open text		Their goal, in their words
2	Situation	How does your team handle this today?	Open text		Tools, steps, workarounds
3	Situation	How many people are involved in the process?	Update a property	Team size	A number or range
4	Problem	What is the main problem you want to solve?	Update a property	Primary pain	One clear problem
5	Problem	What happens if nothing changes this year?	Open text		Cost, risk or a missed goal
6	Decision	Who else will be involved in the decision?	Open text		Names, roles, final approver
7	Decision	How have you bought something like this before?	Open text		Security, legal, procurement steps
8	Decision	When do you need this in place?	List of answer options		A date tied to an event
9	Next step	Shall we book the next meeting with the people you named?	Open text		A meeting booked before the call ends

Q8 options: This quarter; Next quarter; Later; Not sure. Q3 and Q4 use Update a property; check the plan your account needs for that (page 04). Each property is written by one question only.

After the call

- Log the playbook as a Call with the Discovery call type and an outcome
- Check Team size and Primary pain on the deal
- Move the deal to Qualified if the exit criteria are met
- Send the follow-up and confirm the booked meeting

First month of use

8 reps on the team, 6 logged the playbook: adoption 75%. 41 logs from 50 discovery calls: 82% of calls logged with the playbook. Change made: Q7 moved earlier because reps ran out of time before the decision section.

Automation idea: a workflow with the Playbook log trigger can create a follow-up task or notify the manager when this playbook is logged on a deal.

All values on this page are made up for illustration. Team size and Primary pain are example custom properties.

WORKSHEET · COPY FOR EACH PLAYBOOK

Playbook brief

Playbook name and ID	
Purpose (one sentence)	
Use it when	
Do not use it when	
Owner	
Record type	☐ Contact ☐ Company ☐ Deal ☐ Ticket ☐ Custom object
Start from	☐ Scratch ☐ Sales playbook template ☐ Default Discovery Call or Qualification playbook

What the rep should leave the conversation with

Log playbook submissions	☐ Yes, as ☐ Call ☐ Meeting type: _____ ☐ No
Properties written	
Recommended when (rules)	
Shared with	☐ Only me ☐ Everyone ☐ Specific users and teams: _____
Plan check (pages 03 and 04)	☐ Sales / Service Hub Pro or Ent ☐ Seats assigned ☐ Answer types available
Follow-up task on log	
Related sequence or template	
Success measure	
Approved by / date	

DONE FOR YOU

Rather hand your playbooks to a HubSpot Gold Partner?

We interview your best reps, write the playbooks, connect questions to the right properties, set up sharing and reporting, and fill in this template for you.

Book a free consultation

WORKSHEET · COPY FOR EACH PLAYBOOK

Sections and talking points

Playbook: _____ Planned length: _____ min

#	Section	Goal of the section	Talking points or content (links, snippets, videos)	Questions	Min
1	*Open and agenda*	*Agree time and outcome*	*Confirm time, agenda, what they want to leave with*	*Q1*	*3*
1					
2					
3					
4					
5					
6					
7					
8					
9					
Total					

Actions inside the playbook

- [ ] Schedule a meeting action added
  So the rep books the next step live
- [ ] Create a record action added
  If the call often creates a deal or ticket
- [ ] Snippets and links checked
  They work for every rep it is shared with
- [ ] Follow-up task decided
  Created when the playbook is logged

WORKSHEET · COPY FOR EACH PLAYBOOK

Questions worksheet

Playbook: _____ One row per question. If you can't say why you ask a question, or nobody uses the answer, remove it.

Give each property one question only.

Q#	Section	Question	Answer type	Options	Property it writes	Object	Req.	Single	Why we ask
Q8	*Decision process*	*When do you need this in place?*	*List of options*	*This quarter; Next quarter; Later*			*Yes*	*Yes*	*Sets urgency*

Answer type: Open text, List of answer options (Sales Hub Enterprise only per HubSpot's page), Update a property (check your plan, page 04). Object: Contact, Company, Deal, Ticket. Which property types questions support isn't documented: test each one.

WORKSHEET · WITH YOUR BEST REPS

Objection handling

List the objections your reps actually hear. Ask a question before answering, use proof you are allowed to share, and always end on a next step. Add the strongest ones to the matching playbook as a section or snippet.

Objection	What it often means	Ask first	Response points	Proof to share	Next step	Log it as
"We don't have budget this year."	*Not a priority yet, or the wrong person holds budget*	*If budget weren't an issue, is this worth solving now?*	*Tie the cost of the problem to their number; offer a smaller first phase*	*Approved example from a similar team*	*Revisit date with the budget holder*	*Primary objection: Budget*

Log it as: a custom property such as Primary objection, or a custom call outcome. The example row is made up; never name a client as proof without their approval.

WORKSHEET · COPY FOR EACH MEETING

Meeting prep sheet

Meeting, date and link	
Type	☐ Discovery ☐ Demo ☐ Proposal ☐ Negotiation ☐ Renewal
Company and what's new	
People attending and roles	
Deal: stage, amount, close date	

What we already know (pain, tools, timeline, last conversation)

Goal for this meeting	
Agenda sent	☐ Yes, on _____ ☐ Not yet
Questions to ask	
Likely objections (page 12)	
Playbook to open	
Next step to propose	

After the meeting

- ☐ Playbook logged
  Draft autosaves until you click Log
- ☐ Meeting outcome set
  Scheduled, Completed, Rescheduled, No show or Canceled
- ☐ Deal stage and close date updated
  Against the stage's exit criteria
- ☐ Follow-up email sent
  Summary, agreed next step, any materials
- ☐ Next meeting booked
  Or a task with a date
- ☐ New objections noted
  Add them to page 12

Notes during the meeting

The meeting outcomes above are HubSpot's defaults; Sales Hub and Service Hub Professional or Enterprise can add up to 30 custom meeting outcomes.

WORKSHEET

Rollout and adoption tracker

Playbook: _____ Launch date: _____

Rollout step	Owner	Due	Done
Draft reviewed with two reps			
Answer types and properties confirmed for your plan			
Published and shared with the right users or teams			
Recommendation rules or CRM card set up			
Team trained with a live role-play			
Managers use it on their own calls for two weeks			
Usage checked in the Analyze tab after 30 days			
Feedback collected and version 2 published			

Monthly adoption

Copy views and logs from the Analyze tab. Adoption rate = reps who logged it ÷ reps on the team. Logged share = playbook logs ÷ matching calls or meetings held.

Month	Team	Reps	Reps logged	Adoption	Views	Logs	Calls held	Logged share
2026-10	*New business*	*8*	*6*	*75%*	*64*	*41*	*50*	*82%*

What reps said (feedback to act on)

WORKSHEET · ONCE A QUARTER

Quarterly review and change log

Check	How	Done	Notes
Usage	Analyze tab: views, logs and active users; fix or retire unused playbooks		
Questions still useful	Remove questions whose answers nobody reads or reports on		
Properties written	Each still exists, has an owner and is used in a report		
Objections current	New objections from reps and managers added to page 12		
Content and links	Snippets, documents, videos and links still work		
Sharing and recommendations	New team members see what they need; rules match your stages		
Inventory	Page 06 lists every published playbook		

Change log

Date	Playbook	What changed	Why	By
2026-10-27	*Sales | Discovery call | New business*	*Moved Q7 before the problem section*	*Reps ran out of time*	*Sales mgr*

Reviewed by		Next review	

PipelineSync

HUBSPOT GOLD SOLUTIONS PARTNER

Want your sales playbooks written, built and adopted?

We interview your best reps, write the playbooks, connect questions to the right properties, set up sharing, recommendations and reporting, train the team and hand over this template filled in.

RevOps infrastructure, lead to close

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