

Sales readiness checklist

A sales readiness checklist is a list of gates a seller passes before facing buyers in a new situation: knowledge checked, skills practised and scored against a rubric, tools and content in place, early field evidence, and a manager's sign-off, with the evidence and the signer named on every line, for a new hire, a launch or a recertification.

Last updated 2026-10-26. Online version: <https://www.revsfire.io/resources/templates/sales-readiness-checklist>

How to use this template

1. **Pick the event before the lines:** Decide whether this is a new hire, a launch or a recertification, then use the variants block to set how deep each gate goes. A checklist that tests everything every time stops being used.
2. **Write the pass standards before anyone attempts them:** Agree the rubric bar, the quiz mark and the field targets with sales leadership in advance. A standard set after seeing the results tends to be set to whatever the results were.
3. **Name a signer for every line:** Enablement can sign knowledge and practice lines; product marketing can sign competitive lines; only the manager signs field evidence and the final decision. A line without a signer is a line nobody checks.
4. **Collect evidence, not attendance:** A recording, a score sheet, a CRM record or a timed content search. Course completion can sit alongside, but it never passes a line on its own.
5. **Allow ready with conditions:** Most sellers are ready for most of the work before they are ready for all of it. Writing down what they may not do yet, and when that is rechecked, gets them in front of buyers sooner without guessing.
6. **Roll the checklists up for the launch owner:** Before a launch, the owner needs a count of ready, conditional and not-yet sellers against the date, not a pile of individual sheets. Keep the roll-up to one page and send it weekly until launch day.

The template

Seven blocks: a header, the five gates in order, and a variants block that says how deep each gate goes for a new hire, a launch or a recertification. Every line names its evidence and its signer, so "done" means the same thing to everyone. The Excel version keeps the Done column for ticking.

Checklist header

Field	What to write	Your entry
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Seller	Name, role and segment. One checklist per seller per event.	
Readiness event	New-hire ramp, product launch, or quarterly or annual recertification.	
Gate date	The date the seller must be ready by: end of ramp, launch day or the recertification deadline.	
Pass standards version	Which rubric, quiz and field targets apply, agreed before anyone attempts them.	
Enablement owner	Who schedules the checks and keeps the evidence on file.	
Signing manager	The seller's manager, who makes the final decision.	

Gate 1: Knowledge

Check	Evidence	Pass standard	Signed off by	Done
Product and positioning	A recorded two-minute explanation of the problem the product solves, for the main persona	Accurate, in the buyer's language, not a feature list	Enablement	[]
Ideal customer profile and personas	A short quiz, plus three target accounts with a reason each one fits	Quiz passed; accounts match the written profile	Manager	[]
Competitors	Explains where the top two competitors win and lose, using the current battlecard	Matches the battlecard; no unsupported claims about rivals	Product marketing	[]
Pricing and packaging	Builds a quote for a sample deal and explains the discount approval path	Right package, right price, right approver	Manager or deal desk	[]
Sales process and qualification	Walks through stage exit criteria and the qualification framework on a sample opportunity	Can say what moves a deal from one stage to the next	Manager	[]

Gate 2: Skills practised and assessed

Check	Evidence	Pass standard	Signed off by	Done
Discovery	A role-play with the main persona and the completed rubric sheet	Meets the bar on every criterion marked essential	Enablement scores; manager reviews	[]
Demo or pitch	A recorded demo of the	Opens with the buyer's	Manager	[]

	standard storyline, tailored to a sample account	problem; stays within the time limit		
Objection handling	A role-play covering the five most common objections, including price and the main competitor	Acknowledges, asks a question, then answers with evidence, on at least four of the five	Enablement	[]
Scored role-play against a rubric	Score sheet from a full-call role-play, scored by someone other than the seller's buddy	At or above the pass mark set before the attempt; one retake allowed	Enablement	[]
Pricing conversation	A role-play of a discount request from a procurement persona	Holds the guardrails; trades rather than concedes	Manager or deal desk	[]

Gate 3: Tools and content

Check	Evidence	Pass standard	Signed off by	Done
CRM hygiene	Three opportunities created or updated with required fields, a next step and a close date	No missing required fields; every next step dated	Manager or RevOps	[]
Approved content found in the content hub	Finds the current deck, a relevant case study and the security answers for a sample deal, timed	Approved versions only, found without asking a colleague	Enablement	[]
Talk tracks	Delivers the opening and value talk track for the main persona	Uses the current track, not a remembered older version	Enablement	[]
Battlecards	Finds and uses the battlecard for the top competitor during a role-play	Asks a landmine question and gives the approved response	Product marketing	[]
Sharing and follow-up	Sends a follow-up with shared content to a test buyer and shows the engagement record	Content shared from the approved source and tracked	Enablement	[]

Gate 4: Pipeline and field evidence

Check	Evidence	Pass standard	Signed off by	Done
First meetings booked	Meetings in the CRM with contacts who fit the profile	[Number] by [date], set by the manager in advance	Manager	[]
Call scores on live calls	Two recorded live calls scored	At or above the bar, on the	Manager	[]

	on the call scorecard	same rubric used in practice		
Shadowed and co-led calls	Notes from calls shadowed, then calls co-led with the manager or a buddy	[Number] shadowed and [number] co-led, each with notes	Manager or buddy	[]
Opportunity progressed	One opportunity created and moved a stage with the exit criteria met	Stage evidence recorded in the CRM	Manager	[]

Gate 5: Manager sign-off

Field	What to write	Your entry
Evidence reviewed	The date the manager reviewed every line above, and any line accepted on other evidence, with the reason.	
Decision	Ready, ready with conditions, or not yet.	
Conditions	For ready with conditions: what the seller may not do yet, such as run pricing alone, and the date it is rechecked.	
Enablement countersign	The enablement owner confirms the evidence for each line is on file.	
Reported to	The sales leader or launch owner who receives the roll-up, and the date.	
Next check	When this seller is next rechecked: the next launch, quarter or year.	

Variants: new-hire ramp, product launch, recertification

Gate	New-hire ramp	Product launch	Quarterly or annual recertification
Who is in scope	One new seller or a hiring cohort	Every seller who will sell the change	Every quota-carrying seller
Knowledge	Every line	Only what the launch changes: positioning, pricing, affected competitors	Pricing, competitors and anything changed since the last check
Skills	Every line, scored	One launch role-play on the new pitch and its likely objections	The scenarios the team is losing, chosen from win-loss or call review
Tools and content	Every line	New assets found in the content hub; retired assets gone from desktops	Content search for current versions; a CRM hygiene spot-check
Field evidence	First meetings booked and live call scores	The first live calls on the new offer, scored	A sample of recent live calls, scored
Sign-off and deadline	Manager, at the end of ramp or before solo selling	Manager, before launch day; the launch owner sees the roll-up	Manager, early in the quarter or year

A worked example

Example: fictional company. Ferncastle Analytics sells revenue-forecasting software to mid-market sales teams. It is launching a scenario-planning add-on with new packaging on 1 March. Nadia Brennan, the enablement lead, ran the product launch variant for 14 account executives. All names and figures are invented for illustration.

Ferncastle Analytics: launch checklist extract, two weeks out

Seller	Knowledge	Launch role-play	Content hub check	First live calls	Manager decision
Theo Marsh	Passed	Passed on the first attempt	Passed	Not yet possible before launch	Ready with conditions: no add-on pricing alone until his first live call is scored
Imogen Shah	Passed	Below the bar on the price objection; retake booked	Passed	Not yet possible before launch	Not yet: recheck after the retake
Callum Reyes	Missed the bundle discount rule in the pricing quiz	Passed	Opened an old deck saved on his laptop	Not yet possible before launch	Not yet: pricing walkthrough and a repeat content check by Friday

The roll-up the launch owner read

Status	Sellers	What happens on launch day
Ready, or ready with conditions	9 of 14	Take add-on meetings from launch day; first live call scored within a week
Not yet, one gate left	4 of 14	Retake or check booked before launch; each manager owns the date
Not yet, several gates left	1 of 14	Add-on conversations routed to a cleared colleague until the checklist is complete

Example: fictional company. Ferncastle Analytics, Harborview Metrics, Marlow & Finch Logistics and every person named in this example are invented for illustration. Any resemblance to real companies or people is coincidental.

Common mistakes

- **Treating course completion as readiness:** Finishing a module shows exposure. Each line should ask for something the seller did: an explanation, a scored role-play, an asset found, a meeting booked.

- **One checklist for every event:** Running the full new-hire list for a pricing change wastes selling time; running the short launch list for a new hire misses most of what they need. Use the variants block.
- **Role-plays scored by a friend:** If the person scoring is the buddy who coached the seller, the bar drifts. Score against the written rubric, by someone else, or with a tool that applies the same rubric to everyone.
- **No field evidence gate:** Practice in a quiet room is not a live buyer. Without first meetings and live call scores, the checklist can clear a seller who freezes on the first real call.
- **Sign-off with no recheck date:** Readiness decays as products, pricing and competitors change. Every sign-off should say when the seller is next checked.
- **Hiding the not-yet list:** A report of who passed hides the decision that matters before a launch: who should not take the new conversations yet, and who covers for them.