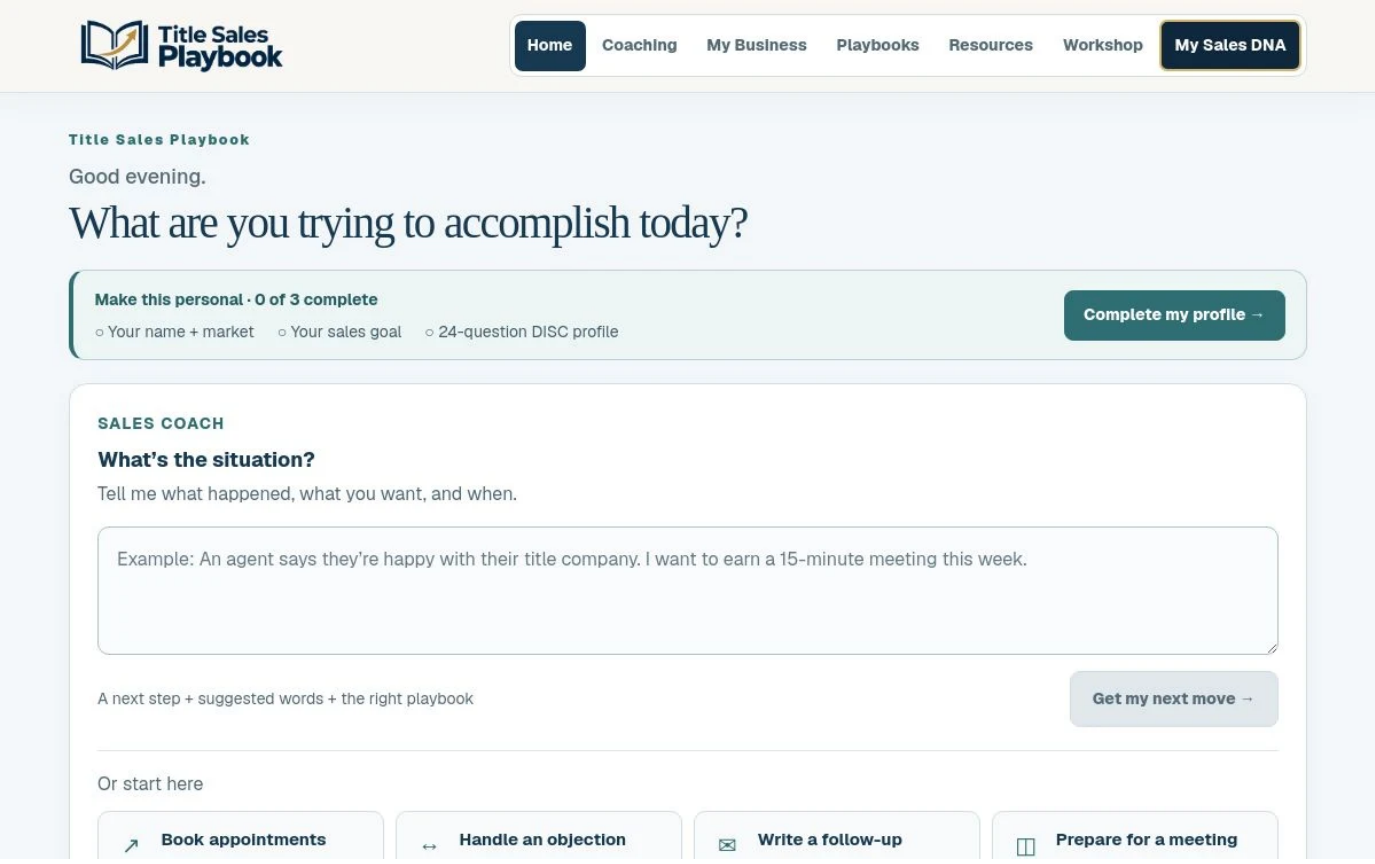
SELECTED WORK 05 / SALES ENABLEMENT

Title Sales Playbook

Put useful sales tools within reach.

Title Sales Playbook organizes sales knowledge around the work a salesperson is doing now. Playbooks, prompts, relationship records, meeting preparation, weekly reviews, and workshop materials sit within one workspace. It demonstrates how a specialized body of expertise can become a practical set of tools.

TITLESALESPLAYBOOK.COM



THE BUSINESS NEED

Your team has scripts and training, but finding the right help for a real conversation takes too long.

What MEFH built

Help a user find relevant guidance, prepare for a conversation, and carry the resulting commitment into follow-up.

01 Playbooks & prompt library

The playbook and prompt library provides searchable scripts, saved favorites, and copy-ready guidance. Organizing the material around a situation makes it easier to apply than a folder of unrelated documents. The user still adapts the language to the person and context of the conversation.

02 Meeting prep & practice

Meeting-preparation and practice tools connect planning, role-play, coaching workflows, and post-meeting notes. They support a sequence of preparation, rehearsal, and reflection. Hosted AI assistance requires separate configuration; the presence of a coaching interface does not itself prove a live provider connection.

03 Relationship tracker

The relationship tracker stores prospects, clients, commitments, follow-up dates, and contact history inside the product. It gives subsequent preparation useful context. These built-in records should not be described as automatic synchronization with an outside CRM or calendar unless that connection has been configured and verified.

04 Goals & weekly reviews

Goals and weekly reviews provide daily priorities, personal scorecards, and planning tools. They help the user compare intention with recorded activity and decide what deserves attention next. The records support reflection; they do not independently establish business production, attribution, or revenue.

05 Sales DNA profiles

Sales DNA profiles provide communication-style assessments and self-reflection briefs. Their role is to help the user think about communication and preparation. The results can serve as prompts for discussing strengths, habits, and different approaches to a conversation within the wider coaching experience.

06 Workshop workbook

The workshop workbook connects agendas, participant notes, 30-day plans, and print or export controls. This bridges a live learning experience and later application. Participants can leave with their own commitments and working notes rather than relying only on a presentation they may never reopen.

Prepare, practice, record, follow through

Illustrative use of the delivered features; this is not a record of an individual customer transaction.

01

Choose the real situation

The user begins with a conversation or task that needs preparation. This narrows the search for a playbook, prompt, or tool and keeps the experience connected to an immediate purpose.

02

Bring in relationship context

The user reviews the person, prior notes, and existing commitments. A relevant preparation process starts with what is known about the relationship, not a generic script used for every meeting.

03

Prepare and rehearse

Meeting tools and practice workflows help organize the intended conversation. Where hosted AI is available, its output remains material for human review and adaptation rather than automatic outreach.

04

Record what actually happened

Post-meeting notes capture the outcome and agreed next step. A meaningful recap distinguishes an idea discussed from a commitment made, then gives follow-up a concrete purpose.

05

Return to the commitment

Follow-up dates, relationship history, and weekly reviews bring the next action back into view. The user decides what to do and records the result in the appropriate workflow.

THE TRANSFERABLE IDEA

Expertise is easier to use when guidance, context, and the next commitment are connected in the same working experience.

The work behind the experience

A situation leads to relevant guidance and meeting preparation. Relationship context and post-meeting notes support follow-up. Personal goals and workshop plans provide a separate review rhythm.

Knowledge maintenance

Assign ownership for playbooks, prompts, and resource links. Review guidance when business practices change and retire material that no longer matches the team's approved methods. Useful organization cannot compensate for outdated content.

Relationship hygiene

Keep names, commitments, and follow-up dates current. For an adaptation, decide whether the built-in tracker is the working record or whether a separate CRM remains authoritative, then define the handoff clearly.

Training follow-through

Use workshop notes and 30-day plans as a basis for later check-ins. Review what participants actually tried and revise the guidance around practical questions. Treat assessments as reflection tools within that learning process.

SUGGESTED OWNERSHIP

Sales professional

Preparation, notes, and commitments

Training owner

Playbook accuracy and workshop content

System owner

Record policy and connection configuration

WHY THE DESIGN WORKS THIS WAY

Organize by the job to be done

Situation-based navigation helps a user find support in the moment they need it.

Carry context forward

Preparation and follow-up become more useful when they reference the same relationship and commitments.

Keep the professional in control

Prompts and coaching support judgment; they do not replace a person's responsibility for the conversation.

What to measure

Suggested measures, not reported results. Establish a baseline, verify the available data, and agree on targets before evaluating performance.

MEASURE	DEFINITION	EVIDENCE NEEDED	WHY IT MATTERS
Resource findability	Users who locate an appropriate playbook for a scenario	Observed task checks and feedback	Improve navigation and naming before adding more content.
Preparation adoption	Meetings with a saved preparation record	Meeting or planning records	Evaluate whether tools fit the user's preparation routine.
Commitment follow-through	Dated commitments with a recorded next action	Relationship and follow-up records	Identify gaps between a conversation and execution.
Workshop application	Participants revisiting or updating their 30-day plan	Plan records or an approved follow-up survey	Review whether learning carries into later work.
Content relevance	Resources users save, reuse, or flag for improvement	Saved items and structured feedback	Guide editorial priorities without assuming a revenue effect.

ACCEPTANCE CHECKS FOR A SIMILAR PROJECT

- ✓ Find a playbook using a realistic sales situation.
- ✓ Save a follow-up and verify it appears in the relevant view.
- ✓ Check the actual status of any hosted AI or external connection.
- ✓ Confirm the intended person carries into preparation and recap.
- ✓ Review print or export output for usable participant notes.

Could this work for your business?

WHERE IT FITS

The model fits an organization with a repeatable method, a defined audience, and several practical tools that belong together. It is especially useful when the problem is applying existing expertise, rather than merely producing more educational content.

A USEFUL FIRST SCOPE

Choose a small set of high-value situations, organize the relevant guidance, and connect one preparation-to-follow-up workflow. Decide how records will coexist with existing systems. Add assessments, workshops, and configured AI when they strengthen a validated daily use case.

QUESTIONS TO BRING TO A CONVERSATION

- Which recurring conversations need the most preparation?
- What approved knowledge should be easiest to find?
- Where should relationship records and commitments live?
- What should a participant be able to do after a workshop?

PROJECT SCOPE NOTES

- Relationship records are built into the product. External CRM, calendar connections, and hosted AI require separate configuration.
- Communication-style profiles are coaching and self-reflection tools. Their value is in the discussion and application that follows the assessment.
- Playbooks and workshop materials require ongoing editorial ownership so the guidance stays aligned with the intended audience and approved methods.

POSSIBLE ADAPTATIONS

Professional training

Situational guidance and participant workbooks

Sales team

Preparation, relationship context, follow-up

Expert-led product

Searchable methods and practical tools

Discuss something like this for your business

View the project **Read the case study online**

Project snapshot: November 3, 2026. Based on project-source review and the published MEFH case-study content. Workflows and evaluation plans are illustrative; no measured business results are asserted.