

■ FREE PLAYBOOK · 90-DAY REP ONBOARDING PLAN · 17 PAGES

The MSP Sales Playbook: From 2 Reps to 10

A 5-stage sales process and a 90-day onboarding plan, so new reps sell the way your best one does.

By Salesbuildr



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5

stages from discovery to close

90

day onboarding plan for new reps

2 → 10

reps: what breaks as you scale

■ A SALES-SYSTEM PLAYBOOK

What's inside

From why training alone fails to a sales system your whole team follows, plus the plans and scripts to run it.

01 Introduction

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The operating system for how you sell

09 Measure & scale

Metrics, pipeline and the path to 10 reps

10 Takeaways & next step

Seven principles, and how Salesbuildr helps

A1–A2 Toolkit: 90-day rep onboarding plan

Week by week, with a checkpoint at the end of each month

A3–A4 Toolkit: questions & objections

A discovery question bank and six objection scripts

■ INTRODUCTION

Training without a system fails

The top performers have a system. Everyone else has a collection of habits.

The fastest path to better sales performance is a system that makes the right way of selling the only way, then training your people to use it.

THE GAP

6%

Average EBITDA across MSPs.

THE TOP 20%

14–25%

EBITDA of the top 20%. The difference is a system.

WITHOUT A SYSTEM

- Templates scattered across someone's drive
- Pricing that depends on who quotes
- Pipeline trapped in an inbox
- Every rep running their own process

“Everyone talks about different theories in sales and marketing. But the crux of it is they do zero of it.”

DARREN STRONG

Written for MSP owners, sales managers and team leads. Built on interviews with 25+ MSP sales leaders on the Harvest MSP Sales Show, and on what we see across the hundreds of MSPs that use Salesbuildr.

■ CHAPTER 01

The MSP Sales Challenge

Why selling managed services is uniquely difficult, and why it gets harder as you grow.

Long sales cycles

Deals take 60–120 days. Every week without momentum lets inertia kill the deal.

Sell solutions

Sell outcomes: less downtime, predictable cost, stronger security, compliance readiness.

Two audiences

The IT manager talks uptime. The owner or CFO buys lower risk and predictable cost.

Trust comes first

Transparent pricing, proof points and fast follow-up say more than any slide.

Recurring revenue

One contract can carry tens or hundreds of thousands in lifetime value, so qualify hard.

The margin gap

Top-20% MSPs earn \$50 gross margin per \$100 of service revenue. The average earns \$38. — James Davis

“You become a business advisor and a thought leader as opposed to a technology person with a tool belt that installs blinky lights.”

TIM THOMPSON

■ CHAPTER 02

The Scaling Inflection Point

At 50+ employees and several reps, the same challenges compound in ways founder-led sales never faced.

01 Hero-rep dependency

When one person holds the relationships, the pipeline and the pricing authority, you have a single point of failure.

02 Buying committees

IT director, CFO, CEO and often compliance, each with different concerns. A single-threaded deal is the fastest way to lose one you thought was won.

03 Split selling from scoping

Hand off to sales engineering above an MRR threshold, for multi-site or compliance-driven scope, or beyond two hours of technical deep-dive.

04 Larger competitors

CDW, Insight, consolidators and PE-backed platforms chase the same midsize accounts. Agility only wins when a system makes it repeatable.

“Stop them being people driven and make them process driven.”

MIKE PARFITT

CHAPTER 03

The Five-Stage Sales Framework

A shared path from first call to signed agreement, embedded in the tools your team uses every day.

STAGE 1

Discovery

Environment, pains, triggers, goals, decision process and past MSP experience. Talk 20%, listen 80%.

STAGE 2

Qualification

Use BANTF (budget, authority, need, timeline and fit) to spend time on deals that can close.

STAGE 3

Needs & design

Technical assessment, gap analysis and solution mapping. Quantify the cost of inaction.

STAGE 4

Proposal

Customer first, pricing next, "about us" last. Send within 24–48 hours and present it. Never just email it.

STAGE 5

Negotiation & close

Keep it a conversation. Assumptive, cost-of-inaction or timeline close.

QUALIFY HARD

60%

of inbound leads disqualified by Ian Groves (Startech), while growing 24% a year. The deals got better.

BUILD IT INTO THE SYSTEM

Put the framework in your CRM, proposal tool, templates and daily workflow. With templates and CPQ, every proposal follows the same structure, pricing logic and value narrative, and building one drops from 30+ minutes to under 5.

"Your proposal is never about you. Talk about your customer first."

HANNEKE VOGELS

CHAPTER 04

Beyond the Funnel: The Bowtie

For recurring revenue the signature is the starting line. Two of three growth engines, retention and expansion, happen after it.

5–7×

cheaper to grow an existing customer than to win a new one.

40–60%

of potential revenue sits untapped in your existing base.

15–25%

annual growth target per account through data-driven expansion.

STAGE 6

Onboarding

A formal sales-to-delivery handoff: notes and solution design transferred, 30-60-90 day expectations set. Measure time to first value.

STAGE 7

Adoption & impact

QBRs as a structured demonstration of value. Watch adoption signals: a customer who stops engaging is at risk.

STAGE 8

Expansion

Whitespace: what does this customer not buy that your best customers already do? Your golden contract is the benchmark.

STAGE 9

Advocacy

Ask for referrals at month six, capture testimonials in QBRs, track NPS and act on detractors before they churn.

The Bowtie model, popularised by Winning by Design, extends your funnel. The funnel is only half the picture, and often the less profitable half.

CHAPTER 05

The Art of Value Communication

Turn features into business outcomes and defeat the status quo.

THE “SO WHAT?” TEST

- | | |
|----------------------------|---|
| “We monitor 24/7” | → You’ll never be surprised by a revenue-costing outage |
| “Enterprise-grade backup” | → Ransomware hits? You’re back online in hours |
| “Weekly endpoint patching” | → Your compliance audit passes without scrambling |

Start with their world

Show them you listened.

Problem-agitate-solve

Name it, amplify it, solve it.

Tell stories

Stories stick. Bullets don’t.

Make it visual

Comparisons, ROI, timelines.

ROI

The ROI conversation

Downtime costs SMBs \$10K–\$50K an hour. Add productivity, breach and compliance risk, and stalled projects. Most managed services are priced at 35–40% gross margin; best practice is 50–55% (James Davis).

PRICE

The price objection

Rarely about price, mostly about perceived value. Never apologise: restate outcomes and quantify the risk of the cheaper option. Five orders a month at 10% off is £30K a year (Graeme Stead).

■ CHAPTER 06

Training & Coaching Your Team

Training is an event. Coaching is a habit.

THE FIRST 90 DAYS: ALAN LLOYD'S FRAMEWORK

WEEKS 1-2	Immersion and values
WEEKS 3-4	Product and market training
WEEKS 5-8	Guided selling with real-time feedback
WEEKS 9-12	Supervised independence

Focus on pipeline

ROLE-PLAY

Awkward, and worth doing

Run “deal autopsies” and practise the sceptical IT manager, the price-focused CFO, the burned prospect, “we’re fine” and committee presentations. At least twice a month.

COACHING CADENCE

- Daily stand-ups for focus and blockers
- Weekly one-on-one pipeline reviews
- Bi-weekly call or proposal reviews
- Monthly performance deep dives
- Quarterly career conversations

■ CHAPTER 07

Build Your Sales Playbook

The operating system for how your team sells.

Ideal customer profile

Specific enough for a new rep to judge fit.

Buyer personas

Concerns and outcomes per buying role.

Discovery question bank

20–30 questions, organised by category.

Qualification criteria

BANTF with clear thresholds.

Objection handling

Frameworks for the top five objections.

Battle cards

One per competitor, incl. the status quo.

Proposal templates

Pre-built for your common scenarios.

Pricing guidelines

Discount authority and margin floors.

Case studies

Organised by industry, size and use case.

HOW TO MAINTAIN IT

The sales manager owns it; the team contributes; nobody ignores it.
Review quarterly with win/loss and competitive insight. Version it, make it searchable and keep it where reps work.

THE TEST

Can a new rep follow it and produce a competent proposal in their first week? If not, the playbook is not done.

CHAPTER 08

Measuring & Scaling Performance

KPIs, pipeline discipline and the path from 2 reps to 10.

LEADING INDICATORS

- Discovery calls booked
- Proposals sent
- Follow-up response time
- Outreach volume

LAGGING INDICATORS

- Win rate and average deal size
- Sales cycle length
- MRR added
- Customer acquisition cost

PIPELINE DISCIPLINE

- 3–5× coverage of target
- Weekly reviews on deal movement
- Ageing analysis for stuck deals
- Separate commit vs. upside

SCALING FROM 2 REPS TO 5 TO 10

- | | |
|--------------|--|
| 2 REPS | The founder coaches directly; informal process works, until it doesn't. |
| 5 REPS | A dedicated sales manager without a full quota. Formal weekly pipeline reviews. Standards become non-negotiable. |
| 10 REPS | Team leads or pods; hunters and farmers. One manager per 5–8 reps. Beyond 8, someone isn't coached. |
| WHEN TO HIRE | When reps are at capacity with qualified pipeline left. If non-selling work tops 40%, invest in systems first. |

James Davis's benchmark: 50%+ gross profit with operating expenses below 32% delivers best-practice 18–20% EBITDA.

■ KEY TAKEAWAYS

Seven principles to take away

Build the system first. Then train your people to use it.

01 Systems beat talent
Build the framework, then embed it in a system everyone follows.

02 Discovery is the foundation
Talk 20%, listen 80%. No fit with their top three priorities, no sale.

03 Sell outcomes
Decision-makers buy lower risk and predictable cost.

04 Coach continuously
First 90 days: pipeline first. Hire for coachability.

05 Measure what you can still change
Track leading indicators as well as win rate and revenue.

06 Systems create speed
Templates and CPQ take proposals from 30+ minutes to under 5.

07 Grow the base you have
Track what each client doesn't buy. Whitespace turns account management into growth.

"Stop talking about which method to choose and just do something."

DARREN STRONG

Turn your sales playbook into daily practice

One system for CPQ, portfolio management, PSA integration and whitespace discovery.

WHAT SALESBUILDR OPERATIONALIZES

Smart revenue discovery

Whitespace in your existing base

CPQ & templates

On-brand proposals in minutes

Native PSA integrations

Autotask, ConnectWise or HaloPSA

50+ distributor feeds

Real-time, accurate costing

Template system

Your playbook as governed building blocks

30-day guarantee

Zero risk to get started

THE PEOPLE BEHIND SALESBUILDR

Meet the team behind the platform and this framework.



Victor Raessen
Founder



Micha Bos
Sales Director Europe

Ready to scale your MSP sales operation?

Book a demo. Used by hundreds of MSPs, integrated with Autotask, ConnectWise or HaloPSA from day one.

[Book a demo](#)

A 90-day plan to get new reps quoting and closing on their own

Bridge Group's 2026 study of 158 B2B tech companies puts the average ramp for a new account executive at 6.2 months. This plan aims to cut that by giving each week one job and one test.

WEEK	WHAT THE REP DOES	DONE WHEN
1	Values, ICP, how we deliver. Sit with the service desk for two days.	Explain who we sell to and why in 2 minutes
2	Shadow 5 discovery calls and 2 proposal meetings. Read the playbook.	Write up one shadowed call in the discovery template
3	Product training: core offers, bundles, what is and isn't included	Quote three standard deals from templates without help
4	Market: competitors, the status quo, top five objections. Role-play twice.	Day 30 check: pass a mock discovery call with the manager
5	Run discovery calls with the manager on the line; debrief after each	Discovery notes complete for every call
6	Build proposals from your own calls; manager reviews before sending	Proposal out within 48 hours of each call

A 90-day plan to get new reps quoting and closing on their own

The manager steps back each month. By week 12 the rep runs discovery, quotes from templates and presents without the founder. The chapter 6 coaching cadence runs alongside.

WEEK	WHAT THE REP DOES	DONE WHEN
7	Present proposals live, manager attends. Practise the price objection.	Two proposals presented, not emailed
8	Own a small pipeline (5-8 deals); daily stand-up, weekly review	Day 60 check: pipeline in the CRM, every deal with a next step
9	Run deals alone; manager joins only for committee meetings	Follow-up within 24 hours on every open proposal
10	Prospect your own leads; ask existing clients for introductions	Meetings booked from your own activity
11	Handoff to delivery: run one kickoff with the project team	A clean handoff with notes and scope agreed
12	Review the quarter: wins, losses, what to change	Day 90 check: agree targets for next quarter

21 discovery questions, by category

Ask three or four from each row, then stop talking. Write their answers in their words; you will reuse them in the proposal.

CATEGORY	QUESTIONS
Environment	How many users, sites and devices? Which tools and licences do you run today? What's coming up in the next 12 months (moves, hires, projects)?
Pain	What went wrong in the last three months? How much time does your team lose when systems are down? Who in the business ends up being the IT help desk?
Triggers	Why are we talking now and not six months ago? Is an insurer, auditor or client asking for anything? When does your current contract end?
Goals	What should be different in a year? How will you judge whether a new provider is working? What would make you renew?
Decision process	Who else needs to agree, and what does each of them care about? Who signs, and what does finance need to see? What happened last time you changed provider?
Budget & commercials	What do you spend on IT today, including surprise invoices? Do you prefer a fixed monthly fee or pay as you go? Is there a budget cycle we need to hit?
Past MSP experience	What did your last provider do well? What made you start looking? What would you never accept again?

Six objections and what to say

Acknowledge it, ask a question, answer with their own facts, then agree a next step. Role-play each one twice a month.

THEY SAY	YOU ASK	THEN
"We're happy with our current provider."	Good. What would they need to change for you to be even happier? · When did you last compare?	Offer a no-cost review against what they have. Book it before you hang up.
"You're more expensive."	Compared with what, exactly? Which items does the other quote leave out?	Put both quotes side by side by scope. Restate the outcome and the cost of the outage they told you about.
"We need to think about it."	What part are you still unsure about? Who else will weigh in?	Agree a date to decide and offer a short call with the other decision-maker.
"Our IT person handles it."	What does that person spend most of their week on? What would they rather do?	Position co-managed support: you take the tickets, they keep the projects.
"Just send me a quote."	Happy to. So it's accurate, can I ask three questions first?	Run a 15-minute discovery, then book a slot to present the proposal live.
"Switching sounds risky."	What went wrong last time? What would a safe switch look like for you?	Walk through the transition plan: phases, dates, who does what, the 30/60/90-day checks.