Sales Collateral Checklist by Funnel Stage

Score each item: ✅ Have it (current) ⚠️ Have it (stale) ❌ Don't have it

contentcamel

Every piece of sales collateral answers one question: "What does the prospect need to move to the next stage?" Use this checklist to audit what you have, find the gaps, and prioritize what to build next. Fix stale essentials first, then create missing essentials, then build nice-to-haves.

TOFU Awareness → Interest

Attract prospects who have a problem but haven't started evaluating solutions.

ESSENTIALS

- [ ] **Blog posts** (5-10): problem content, not product content. 1,500-3,000 words with mid-funnel CTAs.
- [ ] **Industry/trend reports:** original data or curated insights that earn links and authority.
- [ ] **How-to guides:** step-by-step problem solving that naturally positions your product.
- [ ] **Infographics:** one-image summaries. Shareable, scannable, reusable on social.

NICE TO HAVE

- [ ] **Podcast/video series:** builds familiarity with founder or expert perspective.
- [ ] **Email newsletter:** monthly/bi-weekly with real value, not product updates.
- [ ] **Social content:** repurposed blog insights, customer quotes, industry takes.

MOFU Consideration → Evaluation

Help prospects evaluate solutions and build internal consensus.

ESSENTIALS

- [ ] **Case studies** (3-5 min): situation → challenge → solution → results. One per major industry.
- [ ] **Product one-pagers:** single page a prospect can forward to their boss or procurement.
- [ ] **Comparison pages:** honest competitor comparisons. They're already comparing; give your perspective.
- [ ] **Product demo video** (2-5 min): top 3-4 workflows, not every feature.
- [ ] **ROI calculator:** quantify the value. Numbers beat adjectives.

NICE TO HAVE

- [ ] **Webinar recordings:** deep-dives featuring customers or experts, not just your team.
- [ ] **Buyer's guide:** "How to Choose a [Category] Tool." Shapes the evaluation criteria.
- [ ] **Solution briefs by use case:** same product, different framing for different buyers.

BOFU Decision → Purchase

Remove final objections and make the purchase feel safe.

ESSENTIALS

- [ ] **Pricing page/one-pager:** clear, transparent. If quote-based, explain what drives pricing.
- [ ] **Sales battlecards** (internal): one page per competitor. Scannable in 10 seconds on a live call.
- [ ] **Customer testimonials:** short, specific quotes with metrics, not generic praise.
- [ ] **Security/compliance docs:** SOC 2, GDPR, DPA. Often gates enterprise procurement.
- [ ] **Implementation guide:** show the first 30 days. Reduces perceived risk.

NICE TO HAVE

- [ ] **Proposal template:** customizable with exec summary, solution, pricing, timeline.
- [ ] **Technical docs:** API, SSO setup, integration architecture for technical buyers.
- [ ] **Contract summary:** plain-language terms. No lock-in, monthly billing, cancel anytime.

POST Onboarding → Expansion

Reduce time-to-value and drive account expansion.

ESSENTIALS

- [ ] **Quick-start guide:** get to the first "aha" moment fast. Not a 50-page manual.
- [ ] **Feature tutorial videos** (1-2 min each): focused on single features, not full walkthroughs.
- [ ] **Best practices guide:** show what success looks like so customers aspire to it.

NICE TO HAVE

- [ ] **Expansion use cases:** help your champion sell to other teams internally.
- [ ] **QBR template:** structured quarterly review with data, not just a check-in call.

Prioritize Your Gaps

1. Fix stale essentials first.
Outdated case studies or pricing docs are worse than having none. They erode trust.

2. Create missing essentials.
Start with case studies (mid-funnel) and a quick-start guide (post-sale). These have the highest impact per hour invested.

3. Build nice-to-haves last.
Prioritize by what your sales team requests most. If reps keep asking for battlecards, that's your next project.