Sales Team Internal Communication Guidelines

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1. Objective

To streamline communication between Sales, Solution Engineering (SE), and Product teams, ensuring rapid access to technical expertise and minimizing internal friction.

2. Communication Channels and Purpose

Channel	Purpose	Response SLA (Sales Director)
CRM Notes	**Official Record.** All client interactions, pain points, and decisions.	N/A (Mandatory logging before end of day).
Slack Channel: #sales-help-desk	Quick, low-priority product or pricing questions. Non-urgent SE support.	2 hours during business hours.
Slack Channel: #win-reports	Celebrating closed deals and team morale. (Closed Won only).	N/A
Email	Formal communication for Legal/HR, Deal Review Form submission, or high-level client correspondence.	4 hours.
Technical Sales Support Form	**Mandatory** for all client-facing SE/technical engagement requests.	24 hours for SE assignment.

3. Communication Protocol (SE Engagement)

- **Do Not:** Ping an SE directly on Slack for client-facing support without first submitting the **Technical Sales Support Form**.
- **Do:** Provide full context (CRM Link, Client Name, specific question) when asking for help on any channel.
- **Never:** Commit the SE team to a timeline or a custom solution with a client until the SE has formally reviewed and signed off on the **Technical Sales Support Form**.

4. Weekly Forecast Call Standards

- AEs must be prepared to discuss **all Stage 4+ (Negotiation)** deals.
- Discussion must focus on the **Next Step** and **Risk Factors**, not just the close date.
- All forecast updates must be logged in the CRM *before* the start of the call.