

Digital Sales Room Cheatsheet

Your blueprint for building an effective deal room

by  Flowla

What is a digital sales room (DSR)?

A [digital sales room](#) is a custom-branded virtual space designed to streamline the sales process and enhance buying experience. It acts as a centralized hub where sales teams and prospective clients can collaborate, negotiate, and finalize deals in a secure and efficient environment

By 2026, [30% of B2B sales cycles](#) will be managed through digital sales rooms.

Companies using digital sales rooms claim to close [34% more deals](#).

Who needs DSRs?

Answer the questions below to find out if your sales process could benefit from using a DSR.

Our typical sales cycle usually lasts more than a month.	YES	NO
Our typical sales cycle involves more than 1 stakeholder.	YES	NO
Our product or service is complex and needs to be explained in detail.	YES	NO
Our sales process is content-heavy.	YES	NO
Most of our interactions with the buyer happen over digital means.	YES	NO
We have a proper handoff and onboarding once the deal is closed.	YES	NO

If you agree with [2 or more of these statements](#), you have a lot to gain from using DSRs as part of your revenue stack.

What to include in a digital sales room?

Here are some of the frequently used materials to build an effective digital sales room:

Welcome notes:

- A personal intro (text, videos, or audio)
- About us + contact info
- Interactive demo
- Testimonials/ case studies
- FAQs
- Summary of the contents

Communication:

- Live chat
- Video embeds (for async communication)
- Forms/questionnaires
- Calendar (to book a call)
- Checklists
- Call logs (summaries/recordings)
- Follow-up materials

Mutual action plan:

- Next steps to build transparency & accountability
- Action items with assignees and estimated deadlines

Kickoffs:

- Handover notes
- Onboarding plan & goals
- Kickoff/workshop call (booking form, agenda, notes)

Commercials:

- Price proposal
- Commercial terms
- Order form
- Contract
- E-signature

Onboarding:

- Self-served resources
- Onboarding plan
- Next steps and timelines
- Additional resources

How to build a digital sales room?

Step-by-step checklist to create a DSR from scratch.

- 01 Gather your existing sales assets – slide decks, demo videos, case studies...
- 02 Auto-personalize the look and feel with your or your target company's branding.
- 03 Visualize your process, step by step, using your assets and your existing structure.
- 04 Personalize your intro with a welcome note and a short video for a tailored buyer experience.
- 05 Send the unique link to your champion, DSRs are very easy to distribute internally.
- 06 Track engagement analytics and identify all other stakeholders individually, as your champion circulates your link internally.

Digital sales room best practices

Things to keep in mind and pro tips to create an effective DSR.

- ★ Use scalable personalization methods (variables, automated video customization, etc.).
- ★ Build reusable templates for different audience groups (industry, company size, etc.).
- ★ Hide content that'll be useful in later stages (i.e. onboarding resources). Don't overwhelm prospects with too much info!
- ★ Always have clear next steps and specific action items with assignees and due dates.
- ★ Stay on brand with your assets and messaging.
- ★ Reach out to other stakeholders as you identify them. Multithreading opens doors.
- ★ Track intent signals to promptly follow up with the right info.
- ★ Include links to call recordings/transcripts (or AI summaries) for reference.
- ★ Turn your top-performing DSRs into templates to simplify the creation process in the future.



See Flowla in action

Streamline your sales process with digital sales rooms designed to move your deals forward.

