



# SALES PROCESS WORKSHEET

## STEP 01

### Evaluate Your Strategy of the Day: Outline the Process

Whether the results come today or tomorrow, you and your team are doing something to close deals today. What does that look like for you, and does the process differ across your team?

Start with a beginning and an end. What is the first thing your sales team does to get in touch with a potential buyer? What is the last thing they do to finish the sale?

#### Go through your recent leads and ask the team the following:

- How was the lead procured?
- How was the lead distributed or assigned?
- How did the sales rep first contact the lead (i.e., email, LinkedIn or phone)?
- How many attempts did the sales rep make to contact each lead before they got a response?
- Where did the prospect first respond to the sales rep?
- Did the rep's contact attempts follow a specific schedule or cadence?
- After contacting a lead, what questions did the sales rep or sales development rep (SDR) ask in the initial discussion?
- How were the answers to those questions recorded?
- How did the sales rep coordinate follow-up?
- Which files, documents, or other content were sent to the lead?
- Where in the pipeline were those resources delivered?
- How did the sales rep present your company's solution? (i.e., on-site visit, webinar, phone call, deck)
- How did the representative prepare for that presentation?
- How and when was your company's proposal delivered?
- What were the major sticking points during negotiations?
- If the lead was lost, why was it lost?
- If the lead was won and a sale was completed in the past, what did your first post-sale contact with the customer look like?

## STEP 02

### Choose the Right Stages and Tasks for Your Process

First and foremost, your process should be built to support how your customers want to buy. Sit down with the team and evaluate what buyer stages your customers typically go through. Often they will look a little something like this:

- 1. Unconcerned:** The buyer does not yet acknowledge there is a problem in their workflow.
- 2. Investigating:** Something happened and the customer knows there is a potential issue. They've started researching their options for solutions.
- 3. Defining:** The buyer knows something needs to happen. Action is required. They are defining the decision-making process and criteria. They may also be identifying who on their team needs to be in on the decision.
- 4. Selecting:** The decision-making team is evaluating their options and they are deciding between their short-list of solutions.
- 5. Negotiating:** The buyer is negotiating the best deal they can get with their preferred solution(s). Some buyers only negotiate with one option, but others may be keeping their options open and seeing who will give them the best deal.
- 6. Approving:** A formal or informal approval process in place the buyer needs to follow to acquire their chosen solution(s.)

Here are some examples of what those stages may be paired with on your end:

Prospecting: Unconcerned and Investigating	Qualifying, Discovery & Needs Analysis: Investigating and Defining	Planning, Presenting & Deming: Selecting and Negotiating	Closing, Conversion & Implementation: Negotiating and Approving
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Your process doesn't have to look like anyone else's but it should define what you are doing day-to-day in following up on leads. Each sales process stage should have clearly defined goals and objectives, including specific criteria required to move a lead from one stage to the next. They should also align with where the buyer sits in their "buyer journey." Remember, this is about how they want to buy, not how you want to be bought.

Define the stages that arise most often when you successfully close, and outline what happens in each stage.

STAGE	WHAT HAPPENS	WHO DOES IT
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## STEP 03

### Put it all together

