SALES PROCESS CHECKLIST

8 stages for creating sales success
and questions to ask along the way

SELLERANT

ACCELERATE GROWTH

THE VALUE OF A SALES PROCESS

A structured sales process is a buyer-centric framework that helps ensure both buyer and seller are getting the information they need to make a decision about moving the relationship forward. It also identifies and helps resolve any gaps or issues with key points such as solution fit, budget, and timing, to keep the evaluation and buying process on track. Use this structured sales process to measure progress through the buyer's journey, and enable consistency, scalability, and repeatability in your sales execution.

8 STEP SALES PROCESS

CONTACTS IN CRM

1 RESEARCH
2 INTRODUCE
3 QUALIFY
4 LEARN

LEAD QUAL

5 PRESENT
6 PROPOSE
7 RESOLVE
8 AGREE

DEAL PIPE LINE

DECISION OUTCOME

YES, NO or LATER

When contacts are found and entered into a CRM, the sales process begins. There are two primary phases of the sales process.

The first phase is **Lead Qualification**.
- Research
- Introduce
- Qualify
- Learn

The second phase is **Deal Pipeline**.
- Present
- Propose
- Resolve
- Agree

The Lead Qualification phase cycles until there is enough engagement and learning to move to the Deal Pipeline phase. The Deal Pipeline phase cycles until a qualified Yes, No or Later and why decision is reached. After a Yes decision is reached, the buyer journey continues with delivery, support, and service (on-boarding). This may not be a sales responsibility, but the handoff between sales and delivery is a critical step in the new customer acquisition process. Great service produces a great customer experience, better retention and new revenue opportunities.

Use this checklist as a guideline for a repeatable and scalable sales process that generates trust, offers value and creates a better customer experience.

LEAD QUALIFICATION PHASE

RESEARCH

Gather as much knowledge as you can in preparation for starting a conversation. Focus on answers from the macro-level to the micro-level, considering the industry, the market, the company and the individual.

Contacts become leads and continue to cycle through the steps of the lead qualification phase until enough interest and information is generated to advance those leads into the deal pipeline phase.

- ❑ **Know who are you talking to.**
- ❑ **What have you already learned about them?**
- ❑ **Why should they participate in conversation with you?**
- ❑ **What is the purpose of the conversation?**
- ❑ **What is the call to action we want for them?**

INTRODUCE

Be authentic and transparent to establish trust and credibility. Respect that you are interrupting someone, regardless of how much value you have to offer, and get right to the point. Make the conversation about them, and not about you.

- ❑ **Know why are you calling, supporting your "ask" from your research.**
- ❑ **Make the conversation about them, their role, their needs, goals and pain points.**
- ❑ **Ask how they are addressing their current situation, and if they are looking to improve or change.**
- ❑ **Get validation and confirmation based on their perspective, industry expertise and their specific understanding.**
- ❑ **Build interest for more conversation.**

LEARN

Learn about your contact, their organization and their operations. Ask open-ended questions to gain better insights.

- ❑ **Ask "Who, What, How and When" to uncover goals, issues, opportunities and risks.**
- ❑ **Ask "Why" to understand motivations and decision drivers.**
- ❑ **Create a "What If" scenario to uncover opportunities they may not readily see.**
- ❑ **Listen for verbal and tonal cues to determine how you are being received.**

QUALIFY

Gain alignment to validate solution fit. Confirm you are talking to the right person to gain consensus and make decisions.

- ❑ **Identify their role in the buying process:**
  Gatekeeper | Influencer | Decision Maker
  Blocker | Champion | Not part of buying process
- ❑ **Know how your solution aligns to their needs.**
- ❑ **Explain how your solution solves their issues.**
- ❑ **Guide them down the path to a 'Yes, No or Later' decision (and why)?**

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DEAL PIPELINE PHASE

PRESENT

Present to decision-makers and key stakeholders, showcasing your solution and how it solves their business issues. Connect with your customers as a partner for their business who understands their needs, challenges, and desired outcomes and has the ability to deliver unique value for their business.

❑   **Is your customer the hero of the story?**

❑   **Does your solution resolve their issues?**

❑   **What is the value they gain from your solution that others won't provide?**

❑   **Is your presentation easy to understand?**

❑   **Can your story be easily shared by others?**

PROPOSE

Deliver an offer that directly addresses their needs, motivations, and challenges. Lead the conversation toward a "Yes, No, Later and Why" resolution. The deal pipeline phase may continue to cycle through the steps with several key customer contacts until issues from the proposal are resolved and agreement is reached. The deal can then be closed as won or lost.

❑   **How does your solution create a path to help them reach their desired outcome?**

❑   **Can your solution be delivered on-time and on-budget?**

❑   **What are the features and benefits of your solution that they value the most?**

❑   **What is the value that you uniquely bring as a partner to their business?**

❑   **How do your contract and your terms and conditions align with their business operations requirements?**

AGREE

Agree to the next steps before finishing the conversation. If they are unwilling to agree, uncover concerns about continuing the relationship. Without agreement on moving forward, return to the resolve stage of the sales process.

❑   **When is your next meeting?**

❑   **What do you need to do before the next meeting?**

❑   **What do they need to do before the next meeting?**

❑   **Get a firm commitment to continue along the buyer's journey.**

RESOLVE

Be honest, authentic, and transparent. Listen to the concerns and motivations of your buyer. Find a fit that creates value from your solution.

❑   **What questions are there about your solution?**

❑   **What concerns are there about your solution?**

❑   **How can your solution solve their issues? (Provide validation, such as a case study.)**

❑   **What would a positive outcome look like?**