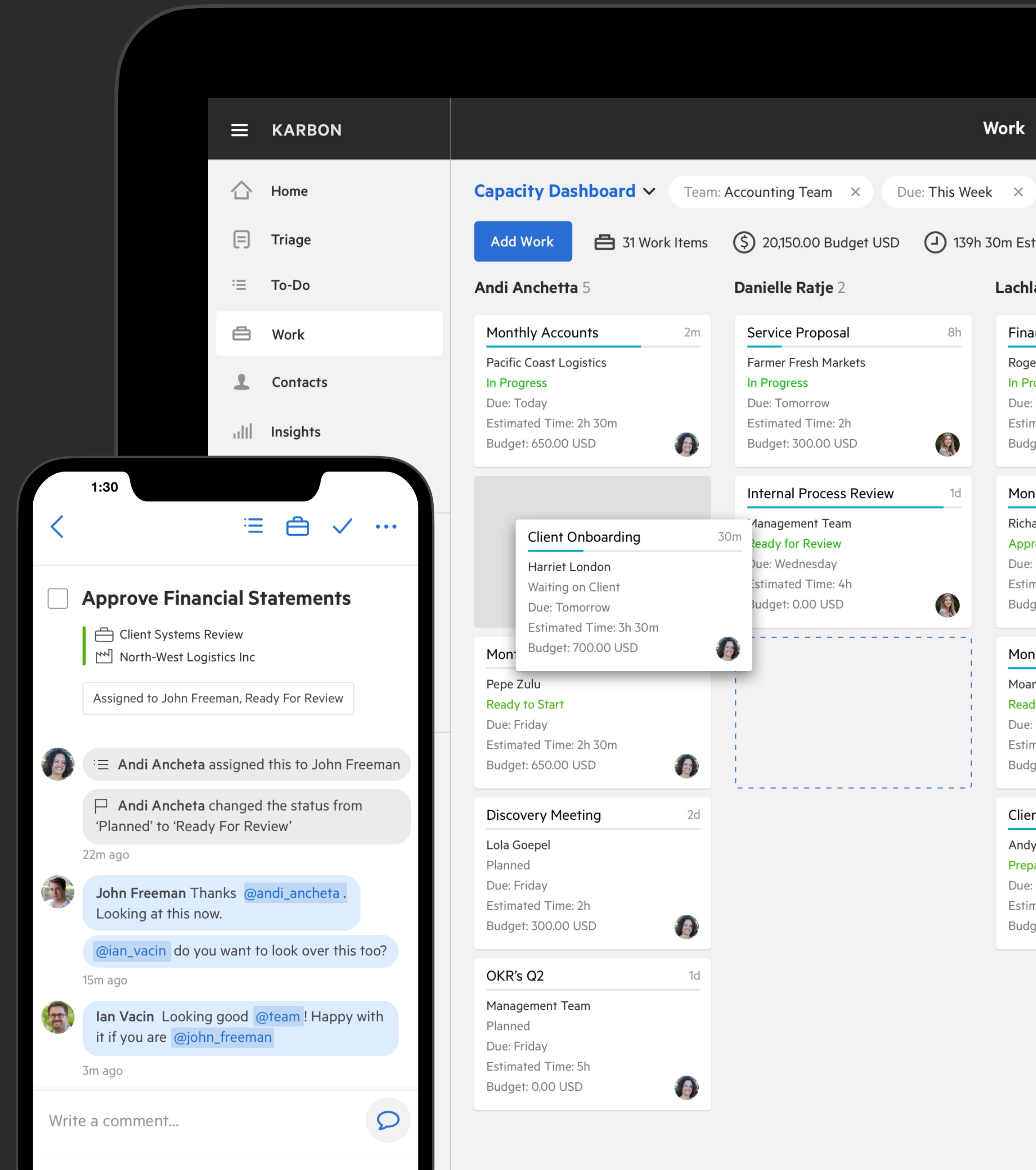




How to manage your sales process in Karbon

karbonhq.com



Meet your host



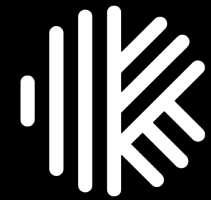
Jake Lyman

Karbon
Account Executive



- 1. Close any open apps**
- 2. Ask and we'll answer**

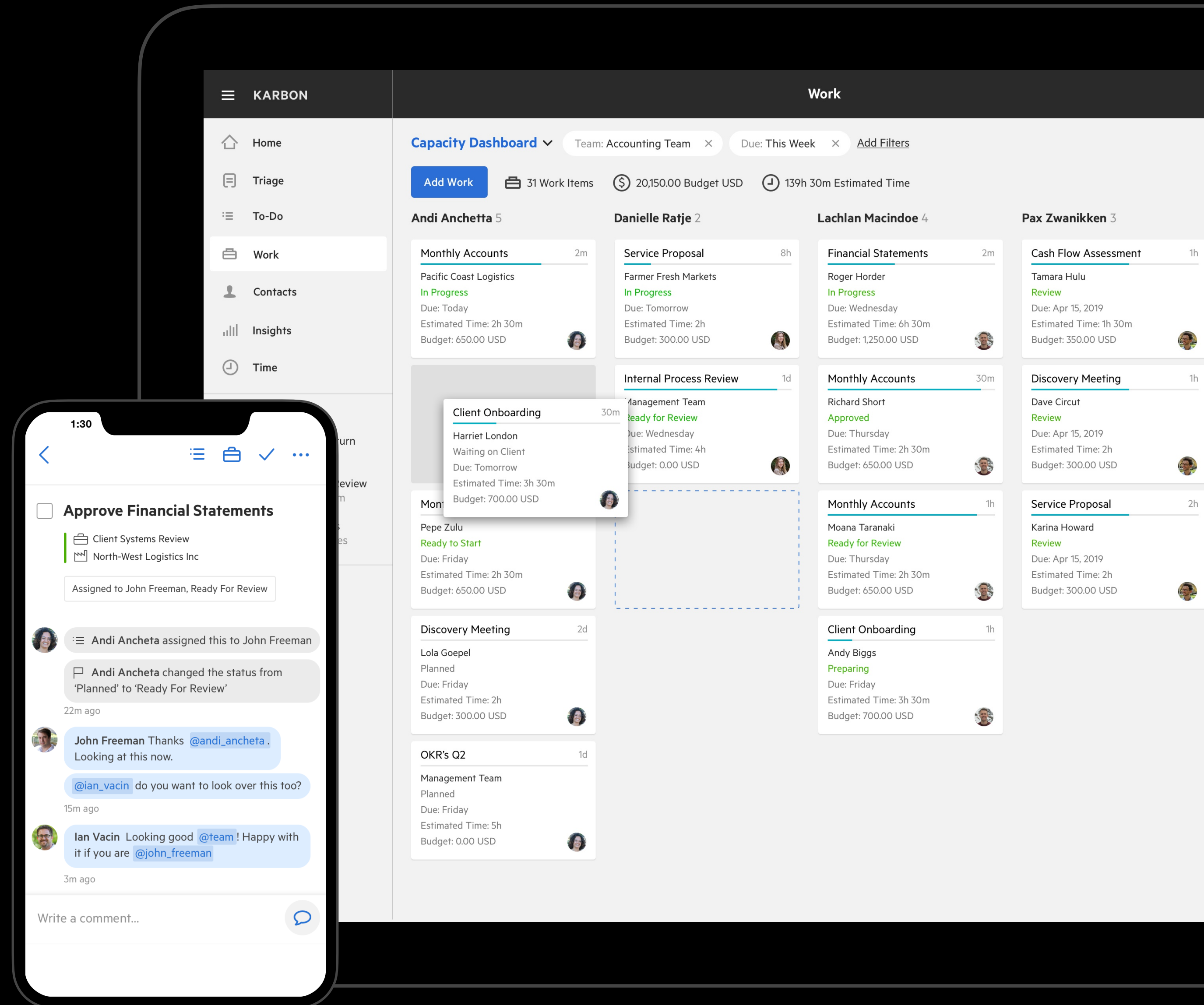




Work Management Software *for* Accounting Firms

karbonhq.com

GET STARTED



Today's agenda

1. Marketing best practices
2. The steps your sales process should include
3. Automating from start to finish
4. Managing your sales process in Karbon

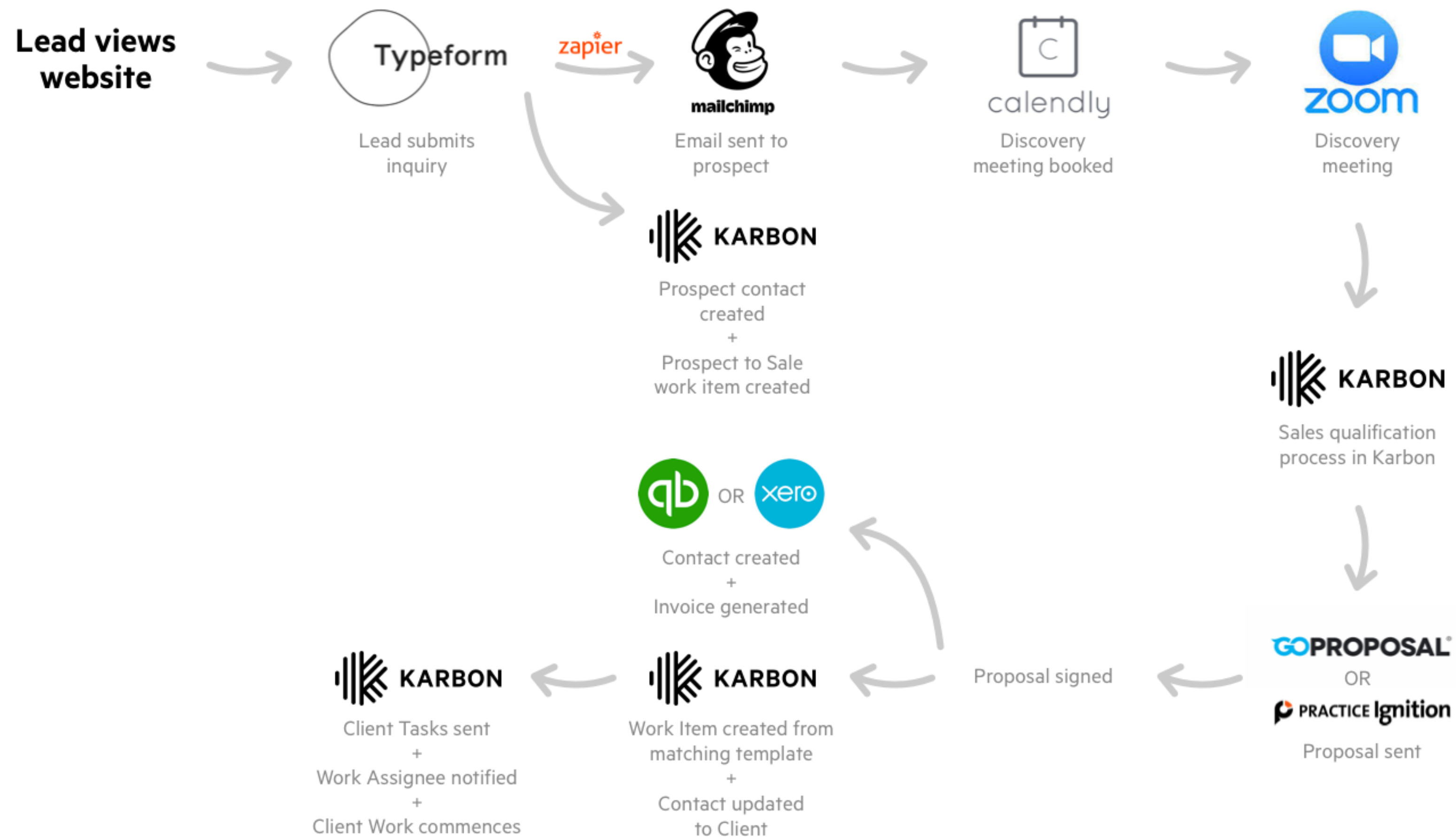


It begins with effective marketing.

- Communicate to your ideal client.
- Show them what they'll get.
- Know what information you need to qualify a prospect.
- Make the experience as easy as possible for them.



Automating your sales process



The steps to include in your sales process.

- Transition from Marketing to Sales
- Qualify prospect via discovery questions
- Move into Sales Process
- Closed Won/Loss
- Transition to service delivery



Managing your sales process in Karbon.



Questions



Thank you

Get started at karbonhq.com

Follow us on Twitter @karbonhq

jake@karbonhq.com

