

Sales process template

This template helps you to think about the process you use to sell your product/service to a potential customer and the activities you take at each step to make the sale.

A sales process is valuable for your sales team for several reasons: it can ensure a consistent experience for your customers, regardless of who in your team is managing the sale. It is helpful for you and your team to understand what works best for a sale to be successful. It can help to create clear revenue goals by understanding the timeline involved in getting a sale across the line. It'll also help you to track your team's progress.

There is no perfect sales process and some steps in this template may not be relevant to your business. Adapt this template to suit your business situation.

Note: the timeline of your sales will depend on your product/service; some are transactional sales, some involve a very long sales cycle. You need to understand how long it should take for your business to get a good sale so you can predict when to have stock in place in market.

You can use the completed example template as a guide. Some of the actions may line up with what your sales team would need to do.

Example: Sales Process Template

SELLING PROCESS	LEAD GENERATION <i>The potential customer is a stranger at this point</i>	CONTACT CUSTOMER <i>Stranger</i>	CONSULTATIVE MEETING <i>Visitor</i>	PRESENT SOLUTION/OFFER <i>Lead</i>	CLOSING <i>Customer</i>	ACCOUNT MANAGEMENT <i>Customer/influencer</i>
PROBABILITY <i>How likely are you to be able to close the sale at this step?</i>	10%	20%	50%	60%	100%	NIL
TIMELINE <i>How long will it take to move a customer from one step to the next?</i>	0 weeks	1 day	1 week	2 weeks	9 weeks	Ongoing
KPIS <i>What/how many activities do you need to do to achieve your total target sales?</i>	· 4 opportunities per week	· 2 appointments per week	· 2 discovery meetings per week	· 2 presentations per week	· 1 close per week	· NPS > 7 · 2 referrals from customer per quarter
OBJECTIVES <i>What are your objectives at each stage? What do you need to do to get a potential customer to the next step?</i>	· Qualify inbound leads & identify leads within your target market	· Contact decision maker(s) & make appointment · Qualify/disqualify	· Build trust/credibility · Scope/identify needs · Qualify/disqualify	· Organise & present solution to decision maker, addressing needs · Attempt to close sale	· Negotiate most profitable outcome · Close	· Ensure expectations are met · Get referrals · Retain/resign
STEPS/ACTIONS & SUPPORT MATERIAL <i>What actions will your sales team take at this step? And is there anything (collateral/sales material) you need to support these actions?</i>	· Obtain prospect list · Research · Qualify decision maker(s) & research on LinkedIn	· Make contact via phone (use a script) · Make appointment · Send meeting request	· Build rapport · Set agenda · Share value proposition · Identify pains/gains · Gauge motivation · Identify ROI · Verbalise solution · Determine buying process · Book next meeting	· Prepare proposal · Practise presenting · All decision makers present · Build rapport & re-engage · Present solution/offer · Situation analysis · Solutions · Recommendations · Cost/benefit analysis	· Understand & manage concerns · Re-qualify decision process · Understand timeframe · Get signed agreement	· Prepare account plan · Work to make sure their expectations are met · Organise quarterly review · Arrange meeting to discuss referrals · Retention strategies
QUALIFYING CHECKLIST <i>What questions do you need to answer and activities do you need to complete to move to the next step?</i>	· Do they fit our ideal target market?	· Contact details correct & research done · CRM & calendar appointment populated · Assigned to correct person	· What is their pain/gain? · Timeline · Book next meeting · Notes taken during the meeting transferred to CRM	· Decision maker present if possible · Present in person (if possible) · Handle questions & gather extra information · Any notes to the CRM	· Manage customer concerns · Is the agreement profitable for the business? · Agreement signed · Any notes to the CRM	· Referrals & testimonials obtained · Yearly re-signs · Call cycle established · Account plan prepared

Sales Process Template

SELLING PROCESS	LEAD GENERATION <i>The potential customer is a stranger at this point</i>	CONTACT CUSTOMER <i>Stranger</i>	CONSULTATIVE MEETING <i>Visitor</i>	PRESENT SOLUTION/OFFER <i>Lead</i>	CLOSING <i>Customer</i>	ACCOUNT MANAGEMENT <i>Customer/influencer</i>
PROBABILITY <i>How likely are you to be able to close the sale at this step?</i>						
TIMELINE <i>How long will it take to move a customer from one step to the next?</i>						
KPIS <i>What/how many activities do you need to do to achieve your total target sales?</i>						
OBJECTIVES <i>What are your objectives at each stage? What do you need to do to get a potential customer to the next step?</i>						
STEPS/ACTIONS & SUPPORT MATERIAL <i>What actions will your sales team take at this step? And is there anything (collateral/sales material) you need to support these actions?</i>						
QUALIFYING CHECKLIST <i>What questions do you need to answer and activities do you need to complete to move to the next step?</i>						