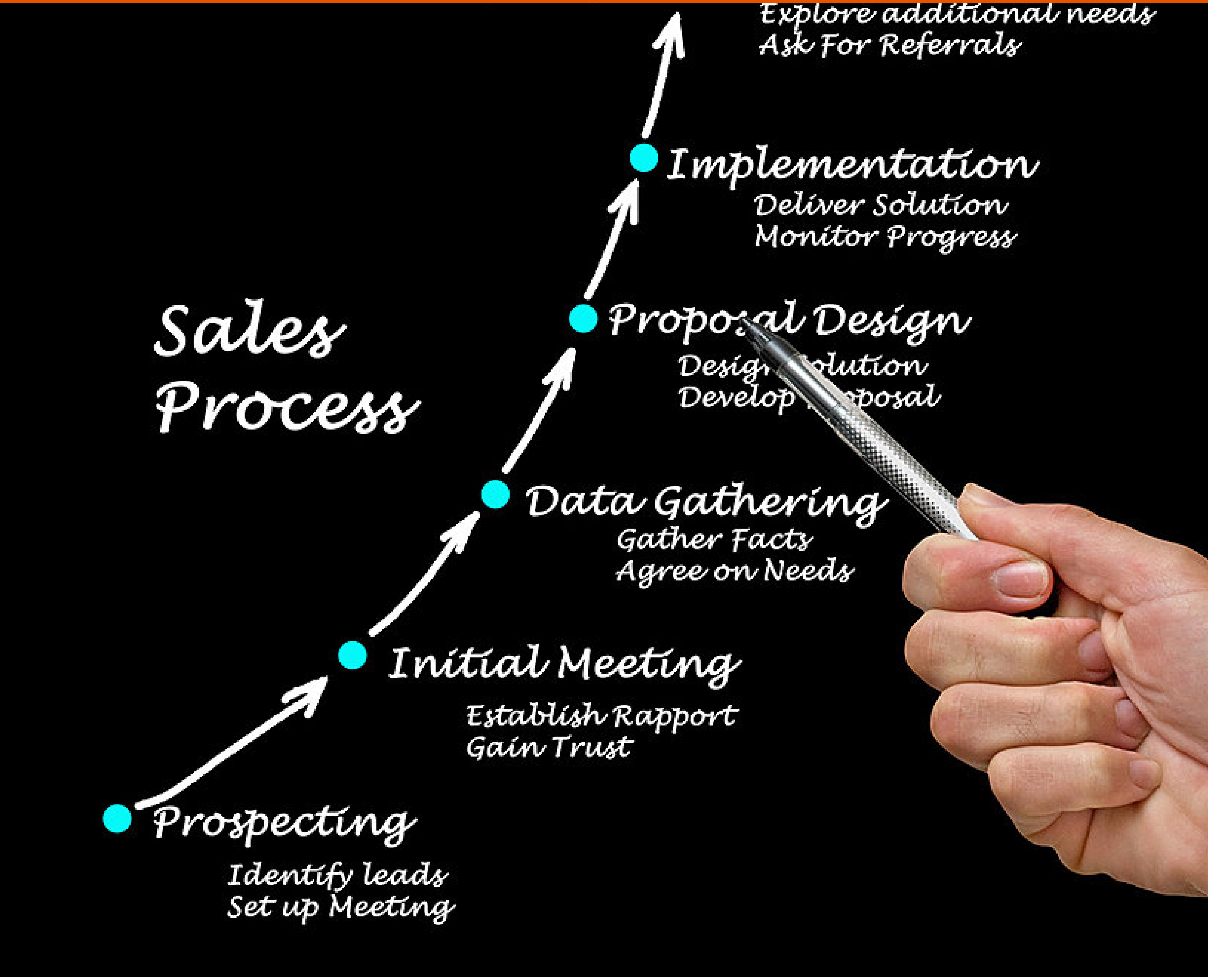
The Ultimated Guide to Building a Sales Process

Create a repeatable process for converting leads into customers



A Lean Sales and Marketing Resource from

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The Importance of a Repeatable Sales Process

A sales process refers to a series of repeatable steps a sales team takes to move a prospect from an early-stage lead to a closed customer. A strong sales process helps reps consistently close deals by giving them a framework to follow.

In this guide, you'll learn the steps of a successful sales process and how to build one for your sales team.

We hope you find this information helpful. If you have any questions, feel free to reach me at 800-834-4910 or at inbound281.com.

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The Ultimate Guide to Creating a Repeatable Sales Process

What is a sales process?

A sales process refers to a series of repeatable steps a sales team takes to move a prospect from an early-stage lead to a closed customer. A strong sales process helps reps consistently close deals by giving them a framework to follow.

Why build a sales process?

You can think of a sales process as a map that guides your sales team on their journey to turn potential leads into customers. Without the map, your marketing team's lead generation efforts would quickly go to waste.

Since most salespeople learn from their peers, having a standardized sales process would help less experienced reps quickly get up to speed with best practices and learn what to do at different sales stages.

You also make more money when you build a proper sales process. When you provide your sales team with a common framework, they have a more efficient roadmap to closing deals than without.

Now that you know what a sales process is and why you should create one, let's consider the stages or steps that a typical sales process follows.

7 Step Sales Process

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1. Prospect.

Prospecting is the process of sourcing new, early-stage leads to begin working through the sales process. It's a vital part of the sales process and part of most reps' daily or weekly workflow.

Prospecting might involve online research on sites like LinkedIn or Quora. It also might take place at conferences or industry events. Additionally, you can prospect by asking current clients or colleagues to refer individuals who might be interested in your product or service.

2. Connect and qualify leads.

The connect step of the sales process involves reps initiating contact with those early-stage leads to gather information. The second part of this step is qualifying new leads — deciding whether or not they're a good-fit lead for your business and whether or not they'll likely move forward in the buyer's journey.

A rep can typically identify qualified leads over a "connect" or "discovery" call (sometimes over email if not via phone) by asking qualifying questions like:

- "What is your role within your company?"
- "What do you do day-to-day?"
- "What problem are you trying to solve?"
- "Why is this a priority for your business?"
- "What other solutions are you evaluating?"

3. Research the company.

Next comes the research step, when reps learn more about each prospect and company.

Research helps your reps put themselves in the customer's shoes to offer a more tailored and personalized experience, thus improving the likelihood of closing a deal.

The crucial part of this stage is understanding each prospect's challenges and needs and establishing the solution your product or service can provide.

You might need your rep to speak with other people at the company in different departments to get a holistic view of the business and its objectives. A good salesperson is expected to understand the company better than the individual prospect who works there.

4. Give an effective pitch.

The presentation step is typically when your salesperson runs a formal product or service demonstration for your prospect.

This step is time-consuming, so it typically comes later in the sales process and is reserved for more qualified prospects — which is why the connecting and qualifying step is so critical. You don't want a sales rep wasting any of their valuable time if it's avoidable.

Tailor each presentation to meet the specific prospect's unique use case and pain points. Additionally, a rep might bring an engineer or executive to the meeting with them to demonstrate the level of service the customer will receive when doing business with your company. This also allows them to answer more technical questions the rep might not be best suited to answer.

5. Handle objections.

It's not uncommon for prospects to have objections to your salesperson's presentation and proposal. In fact, it's expected — which is why this is a specific step in the sales process. Your sales team should be prepared to handle any and all objections.

Listening to your prospect's objections and questions can help your reps better tailor your product to fit their needs. Through their research and presentation preparation, reps should identify and anticipate possible objections, whether about cost, onboarding, or other parts of the proposed contract.

6. Close the deal.

This step of the sales process refers to any late-stage activities that happen as a deal approaches closing. It varies widely from company to company and may include delivering a quote or proposal, negotiation, or achieving the buy-in of decision-makers.

Closing a sale what every salesperson wants to achieve. It should result in a mutually beneficial, contractual agreement between the prospect and the seller. Once a deal closes, the salesperson receives a commission on the price they negotiated with the customer, and the account usually passes to an account manager or customer success representative.

7. Nurture and continue to sell.

Although closing deals is the ultimate goal in sales, it's not where sales reps stop working with customers. Not only should reps oversee that customers receive what they've purchased, but they should also play a part in transitioning customers to whichever team is responsible for onboarding and customer success. The final step of the sales process also involves continuing to communicate and reinforce value to customers. This can provide opportunities to upsell and cross-sell as well as secure referrals from delighted customers.

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