



CLIENT EXAMPLE OF SALES PROCESS (FROM LEAD TO CLOSE)

Pilots, regardless of their experience level, complete a pre-flight checklist every time they get on a plane. The pre-flight checklist helps to ensure that no critical step is overlooked or forgotten even if the pilot is in a hurry or preoccupied with other issues. In the same way, a sales process checklist can help you to track each stage of the sales cycle and is the first step to creating a sales process plan.

The specific form of your sales process will vary depending on the nature of your products and the type of prospect you sell to. A salesperson selling expensive manufacturing equipment to large companies will have a much longer and more complicated process than a salesperson selling used books door-to-door to consumers. However, any salesperson, regardless of product type, can benefit from a checklist review. Here is an example of a simple sales process checklist that might suit your needs.

Basic Sales Process

Prospecting for Leads

- Lead list checked against database for duplicate
- Lead fits basic prospect requirements (e.g. income level, type of business, etc.)

Setting Appointment

- Initial contact made (phone call, email, in-person visit, etc.)
- Pre-qualification completed
- Appointment scheduled
- Researched prospect to determine needs

Presentation

- Final qualification completed - prospect is a true opportunity
- Prospect needs assessed
- Decision maker identified
- Purchasing process and requirements identified
- Next steps determined (scheduled a second meeting, collected RFP requirements, etc.)

Closing

- Prospect objections & questions addressed
- Appropriate product/service type selected and accepted
- Customer signed contract
- Asked customer for permission to use as a reference or testimonial
- Asked customer for referrals

Post-Closing

- Reported sale to sales manager
- Order processed and filled
- Sent thank-you note to customer
- Followed up to confirm customer satisfaction
- Resolved any questions or problems

Credit to Wendy Connick

