



Generic Sales Process Template

Filter and delegate lead

- ✓ Owner
- ✓ Action
- ✓ Objective
- ✓ Tools and resources

Contact lead

- ✓ Owner
- ✓ Action
- ✓ Objective
- ✓ Tools and resources

Needs Analysis

- ✓ Owner
- ✓ Action

- ✓ Objective

- ✓ Tools and resources

Presentation/Proposal

- ✓ Owner

- ✓ Action

- ✓ Objective

- ✓ Tools and resources

Follow up/through

- ✓ Owner

- ✓ Action

- ✓ Objective

- ✓ Tools and resources

***Considerations for initial filtering and consequent action**

- ❖ Values/culture fit
- ❖ Wheelhouse
- ❖ Payment terms
- ❖ Dollar amount/profit margin
- ❖ Sales cycle – cash turn around
- ❖ Long term and residual potential

***Considerations during sales process**

- ❖ Framing
- ❖ BAM – keeping control
- ❖ Referral strategy
- ❖ Testimonial timing
- ❖ WOW Factor
- ❖ CRM
- ❖ Systematic touch plan