SALES PROCESS

STEPS TO CLOSED WON

Having a documented sales process provides a common sales language for the organization, creates accountability, sets goals, and drives long-term sales success. Your organizations CRM should be customized to support your sales process methodology, providing the needed sales metrics to predict future revenue growth. This process is supported by company specific unique value proposition, sales training, and part of the overall sales enablement process. The goal is to ensure selling competency through each step.

STAGE	DESCRIPTION	STAGE GOAL	TOOLS REQUIRED
1) Lead	An unqualified potential opportunity. We are not sure if they are a valid target or not	Qualify the Lead to see if they are in fact a true Prospect	Target Client Profile
2) Prospect	A qualified lead who meets our target client profile and likely values the services we provide	Research as much information as possible about the Prospect, populate CRM	CRM
3) Introduction	The **initial** contact with the Prospect (in-person, phone, or email)	Provide a meaningful and differentiated first impression. Company and self **Close:** an initial 20-minute meeting with the Prospect to conduct Needs Analysis	Impactful and concise Elevator Speech (verbal, written, social)
4) Needs Analysis	Further qualify the Prospect, build relationship, and illustrate competency (personal and company). No overt selling or "puking" on the Prospect	Ask open-ended questions to understand client pain points **Close:** a 30-minute follow-up meeting to present potential solutions	Needs Analysis Question Guide
5) Present Solutions	Based on Needs Analysis findings, present targeted solutions to continue to build competency and intrigue	**Close** confirmation of inclusion on the upcoming bid list and **secure bid release date.**	Company Unique Value Proposition selling assets / library.
6) On Bid List	Cultivate the relationship to keep it warm leading up to bid release. Become a "resource" of important information for your prospect	Communicate meaningful company / industry information on a regular basis **Close:** Gain agreement to stay in contact with prospect (social, in-person, etc.)	Communication Strategy, library of available tools

7) RFP Received	Prospect has forwarded the bid documents. Read thoroughly Confirm bid walk or not	Quickly ask any clarifying questions to show interest, understanding, and desire to produce as complete and accurate bid as possible	Corporate RFP review process with key stakeholders
8) Proposal Submitted	A customized proposal is submitted clearly articulating company value and understanding of qualifications required • Would you hire you?	Show competency and uniqueness of offerings and messaging. Look and feel are important • What would the buyers boss think?	Fully Vetted Proposal not judged on the number of pages, but on impression and impact
9) Presentation	The focus of the presentation should be how and why you will produce the **best outcomes** for the client - against their stated needs	Be impactful, memorable, show understanding, and competency • Operations is the focus more than Sales	High quality presentation delivered comfortably in the time allotted and by competent sources
10) Closed Won/Lost	Celebrate the victories and learn from the losses. Whether winning or losing, it's critical to learn from both.	Seek to deeply understand the "why's" for continued improvement	De-brief Questionnaire to capture insight
11) Re-Bids/Repeat	Six months from the end of your existing contract date, treat your customer as a new prospect. Go back to Step 4 and through the entire process	Reinforce the organization focus on the importance of keeping existing clients **as critical** as acquiring new ones	Sales Process Guide