How to Map a Sales Process
THE IMPORTANCE OF DEFINING YOUR SALES PROCESS
The most important thing you can do is make sure your team is following an effective sales process.
SALES PROCESS

A set of clearly defined steps and methods of communication between a company and its prospects

SOURCE: THE SALES ENABLEMENT PLAYBOOK
Your sales process is the foundation of everything your team does.
THE SALES PROCESS PARADOX

Too much process kills sales teams, but sales teams die without process.

SOURCE: THE SALES ENABLEMENT PLAYBOOK
DEFINING YOUR SALES PROCESS WITH THE BUYER'S JOURNEY
BEFORE YOU CAN DEFINE YOUR SALES PROCESS, YOU HAVE TO UNDERSTAND WHO YOU’RE SELLING TO.
Once you know who you’re selling to, you need to understand the sales process from their perspective.
THE BUYER’S JOURNEY

The active research process someone goes through leading up to a purchase
IT REALLY COMES DOWN TO AN **ACUTE AWARENESS** OF THE BUYER.
The Buyer’s Journey

- Awareness Stage
- Consideration Stage
- Decision Stage
The Buyer’s Journey

Awareness Stage

Consideration Stage

Decision Stage
The Buyer’s Journey

Awareness Stage

Consideration Stage

Decision Stage

EMOJI ISLAND
The Buyer’s Journey

- **Awareness Stage**
- **Consideration Stage**
- **Decision Stage**
DEFINING THE STEPS OF YOUR SALES PROCESS
Define the steps your sales reps need to take to help good-fit prospects move forward in their journey.
Identifying Your Sales Process

1. Lay out the buyer’s journey for your target persona.
Identifying Your Sales Process

1. Lay out the buyer’s journey for your target persona.

2. Identify the places where they can’t move forward without help from a sales rep. These are the steps of your sales process.
Leave room for your reps to be themselves and to **adapt** to the needs of individual prospects.
Identifying Your Sales Process

1. Lay out the buyer’s journey for your target persona.
2. Identify the places where they can’t move forward without help from a sales rep. These are the steps of your sales process.
3. Define clear exit criteria for each step.
EXIT CRITERIA

The things that have to happen in order for a sale to move from one stage of your sales process to the next
For each step in your sales process, ask yourself…
For each step in your sales process, ask yourself...

- What does the rep need to do to help the prospect move forward?
For each step in your sales process, ask yourself…

- What does the rep need to do to help the prospect move forward?
- What indicates that the rep has completed their role in that phase of the buying process?
For each step in your sales process, ask yourself…

- What does the rep need to do to help the prospect move forward?
- What indicates that the rep has completed their role in that phase of the buying process?
- Is there certain information they need to collect from the prospect?
For each step in your sales process, ask yourself...

- What does the rep need to do to help the prospect move forward?
- What indicates that the rep has completed their role in that phase of the buying process?
- Is there certain information they need to collect from the prospect?
- Are there certain commitments they need to secure?
Your CRM should be your company’s **source of truth** for every sale’s status.
Sales Process Stage Standards

- Required
- Factual
- Inspectable
- Buyer-centric
Sales Process Stage Standards

- Required
- Factual
- Inspectable
- Buyer-centric
A required step is one that you want your reps to take in every sale, no matter what.
Take out anything that can reasonably be skipped without hurting the customer's long-term success and happiness.
YOU SHOULD ALSO BE ON THE LOOKOUT FOR REDUNDANCY IN YOUR SALES PROCESS.
Sales Process Stage Standards

- Required
- Factual
- Inspectable
- Buyer-centric
FACTUAL

A factual step is tied to a specific action rather than being based on a feeling.
When it comes to determining whether a step has been completed, you want a clear-cut yes or no.
Sales Process Stage Standards

- Required
- Factual
- Inspectable
- Buyer-centric
An inspectable step is one that can be verified by a record inside the CRM.
Your sales process needs to focus on the things that are in your team’s control.
Sales Process Stage Standards

- Required
- Factual
- Inspectable
- Buyer-centric
A buyer-centric step is one that’s represented from the buyer’s point of view.
You want each step to be a combination of a rep-focused action and a buyer-focused outcome.
Seller-centric

DEM

✓ I gave them a demo
I gave them a demo
Seller-centric

DEMO
✓ I gave them a demo

Buyer-centric

PRODUCT EVALUATED
<table>
<thead>
<tr>
<th>Seller-centric</th>
<th>Buyer-centric</th>
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<tbody>
<tr>
<td><strong>DEMO</strong></td>
<td><strong>PRODUCT EVALUATED</strong></td>
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<tr>
<td>✓ I gave them a demo</td>
<td>✓ Buyer showed up</td>
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**Seller-centric**

**DEMO**

✓ I gave them a demo

**Buyer-centric**

**PRODUCT EVALUATED**

✓ Buyer showed up

✓ Next meeting scheduled
Seller-centric

**DEMO**
✓ I gave them a demo

Buyer-centric

**PRODUCT EVALUATED**
✓ Buyer showed up
✓ Next meeting scheduled
✓ Responded to recap email
When the stages of your sales process are defined that rigorously, the forecasts you build on those stages will actually be accurate.
Sales Process Stage Standards

- Required
- Factual
- Inspectable
- Buyer-centric
Focus on creating a sales process that's strong enough to serve as the foundation for your sales organization.
YOUR RELATIONSHIP WITH THE CUSTOMER SHOULDN'T END WHEN THE SALE CLOSES.
It isn’t good enough anymore for salespeople to close sales without thinking about how satisfied the customer will be afterward.
Happy customers are much easier to sell to than total strangers are.

SOURCE: PIXABAY
Your customers’ word-of-mouth far outweighs your company’s marketing and sales efforts.

SOURCE: PEXELS
FOCUS ON THE ACTIONS THAT WILL MAKE YOUR CUSTOMERS STICK AROUND FOR THE LONG TERM.
CREATING YOUR SALES PLAYBOOK
Your job as a sales leader is to figure out which methodology is going to work best when it comes to executing your sales process with your target persona.
Do some research and figure out what your team needs in a methodology.
More important than the methodology you choose is the way you document it.
Four Areas a Playbook Should Cover

• What to know
Four Areas a Playbook Should Cover

• What to know
• What to do

SOURCE: THE SALES ENABLEMENT PLAYBOOK
Four Areas a Playbook Should Cover

• What to know
• What to do
• What to say

SOURCE: THE SALES ENABLEMENT PLAYBOOK
Four Areas a Playbook Should Cover

- What to know
- What to do
- What to say
- What to show

SOURCE: THE SALES ENABLEMENT PLAYBOOK
YOUR PLAYBOOK SHOULD INCLUDE THE **CONTENT** THAT YOU WANT YOUR REPS SHARING WITH PROSPECTS DURING THE SALES PROCESS.
## Persona/Pain/Feature/Content Matrix

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EVALUATING YOUR SALES PROCESS
You need to continually evaluate how well everything is working.
The 3 Stages of a Sales Process:

- Humming
- Experimenting
- Thrashing

SOURCE: THE SALES ENABLEMENT PLAYBOOK
More than 80% of reps are hitting quota consistently, new hires step in and ramp quickly to target performance, and no one is complaining about “process improvements.”

SOURCE: THE SALES ENABLEMENT PLAYBOOK
YOUR SALES PROCESS IS NEVER PERFECT.
EXPERIMENTING

If the process isn’t humming, the best way to get it there is to run rapid experiments and continuously improve.

SOURCE: THE SALES ENABLEMENT PLAYBOOK
THRASHING

Continuous improvement in a controlled environment is ideal and recommended, but thrashing from one “solution” to another is corrosive.

SOURCE: THE SALES ENABLEMENT PLAYBOOK
THANK YOU.