

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



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.

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.

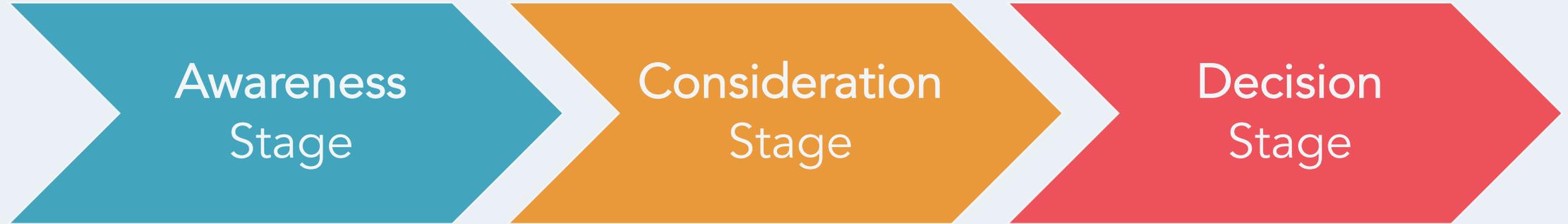


THE BUYER'S JOURNEY

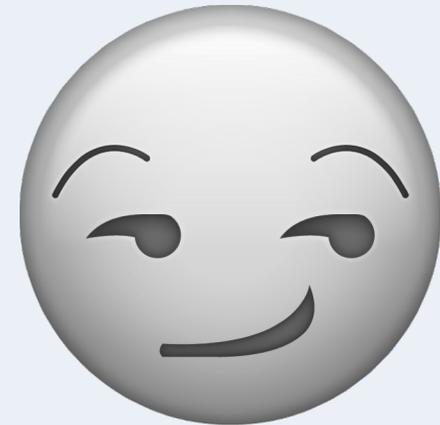
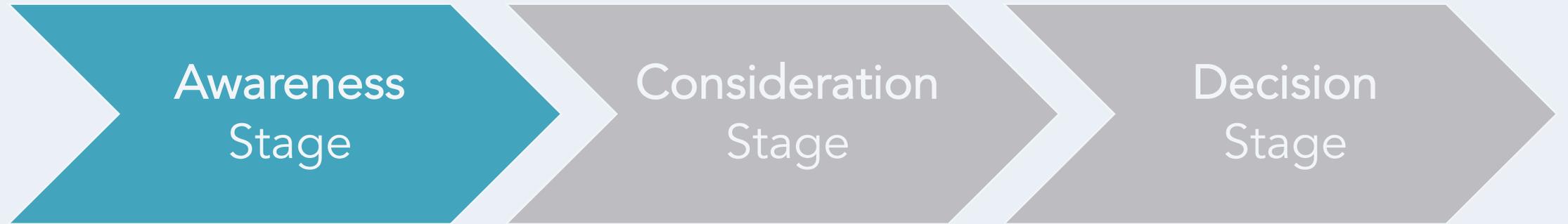
The active research process someone goes through leading up to a purchase

IT REALLY COMES DOWN TO
AN **ACUTE AWARENESS** OF
THE BUYER.

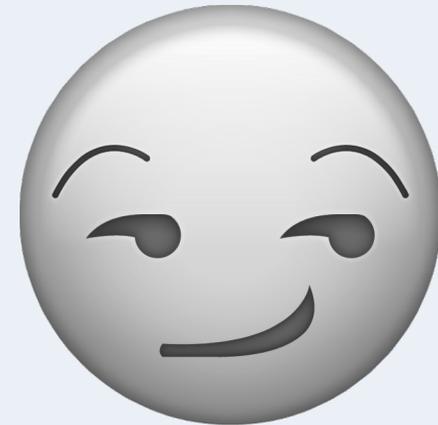
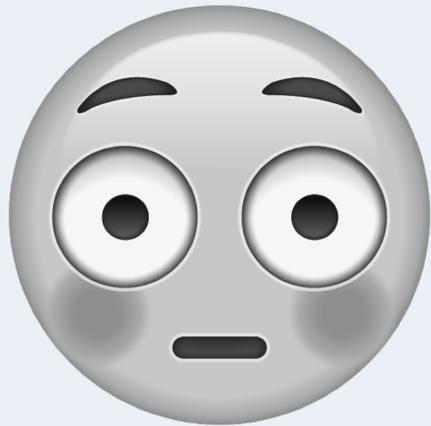
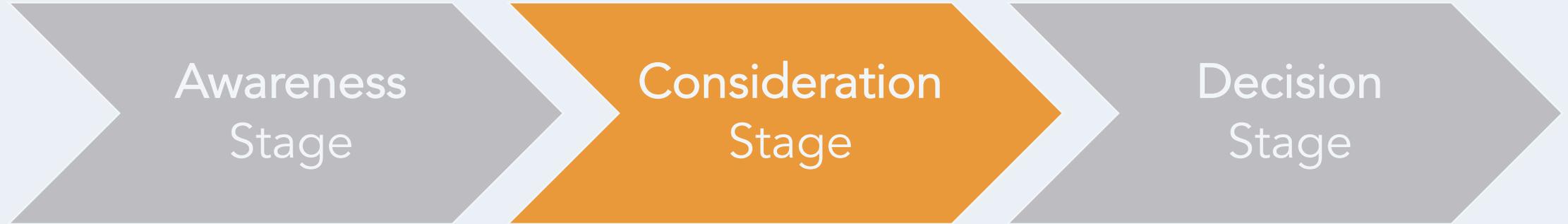
The Buyer's Journey



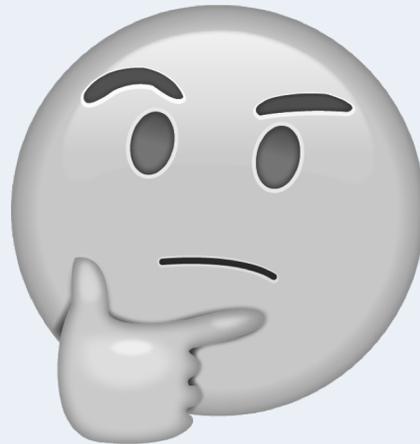
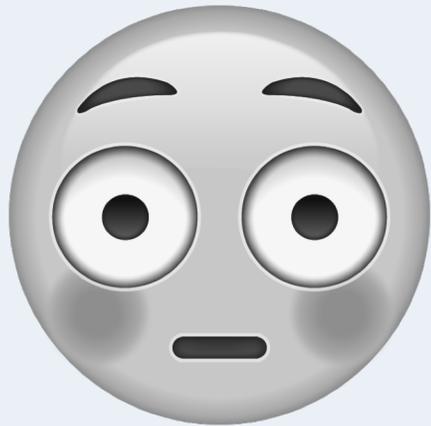
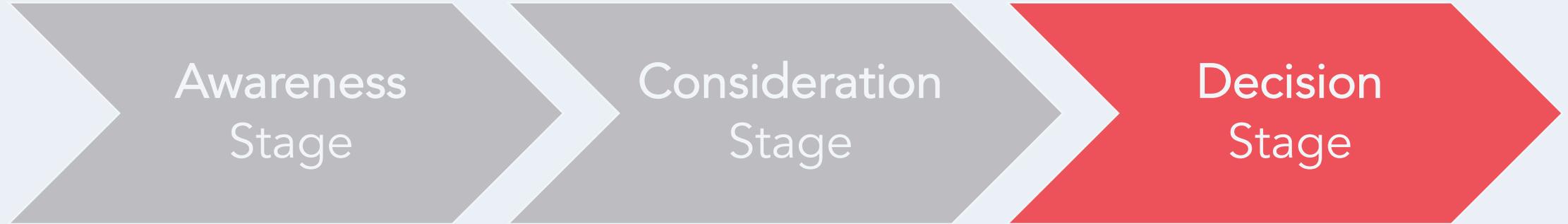
The Buyer's Journey



The Buyer's Journey



The Buyer's Journey



DEFINING THE STEPS OF YOUR SALES PROCESS

A blurred image of a winding road through a forest, suggesting speed and forward movement. The road is paved and has white and blue markings. The trees and foliage are heavily blurred, creating a sense of rapid motion. The sky is a clear, light blue.

Define the steps your
sales reps need to take
to help good-fit prospects
move forward in their journey.

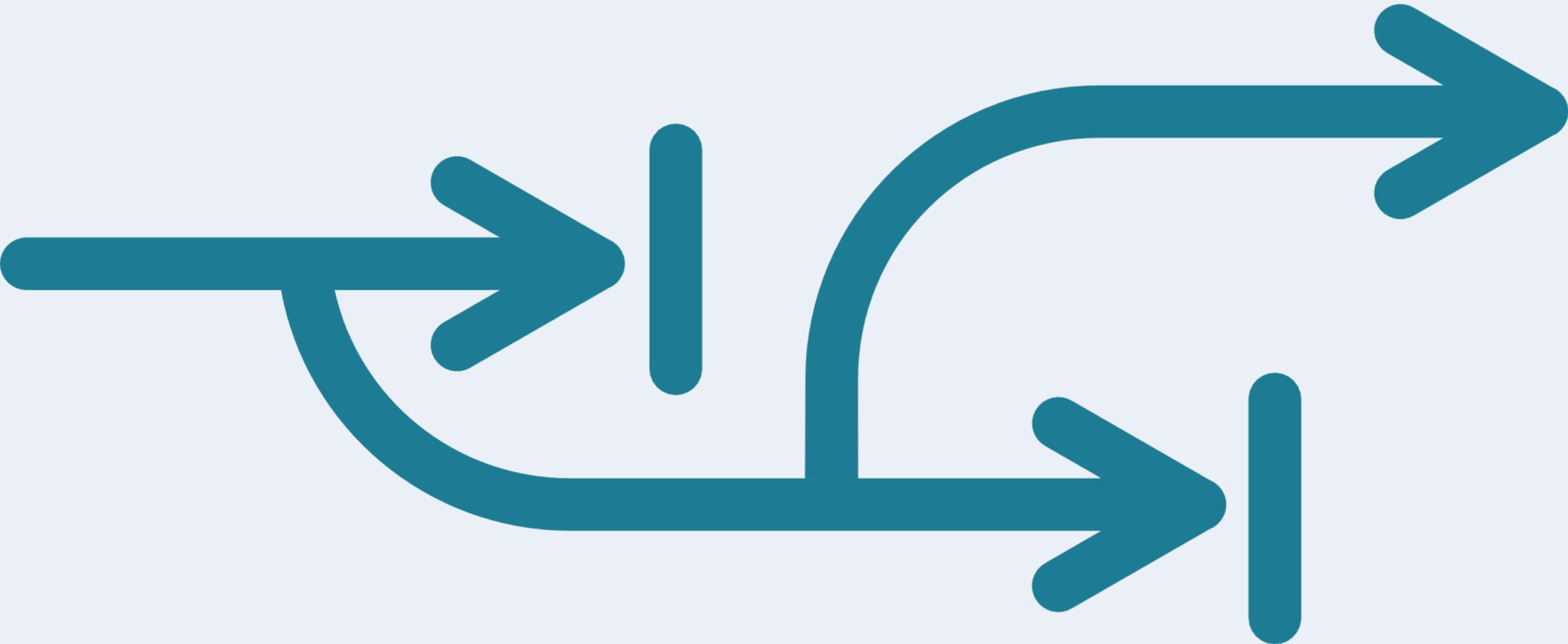
Identifying Your Sales Process

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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...

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- What does the rep need to do to help the prospect move forward?

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- 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?

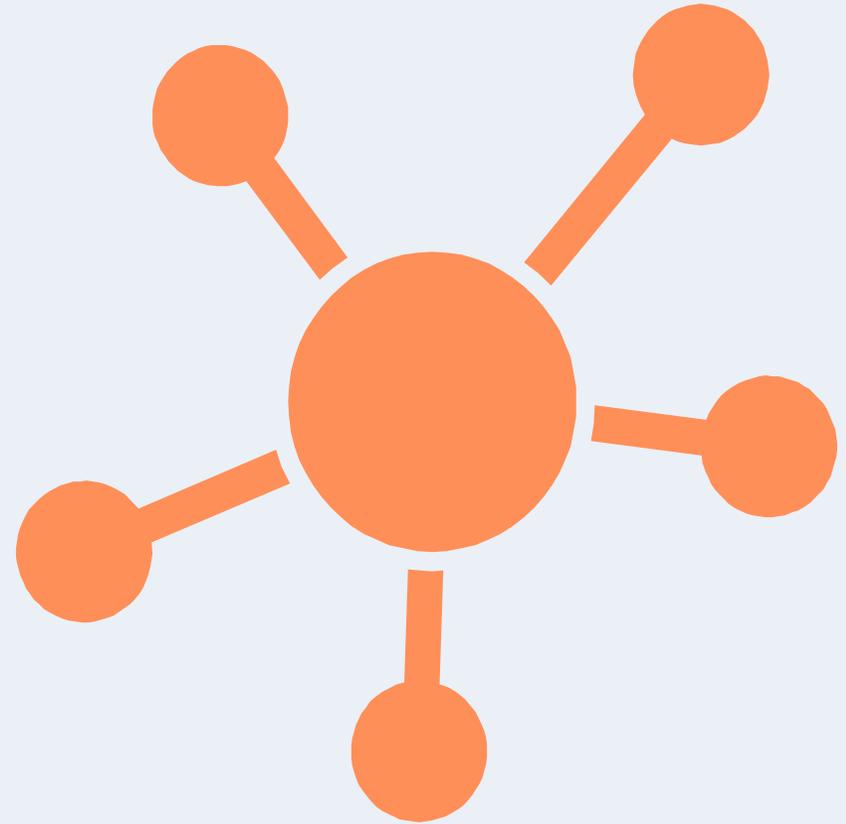
For each step in your sales process, ask yourself...

- 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

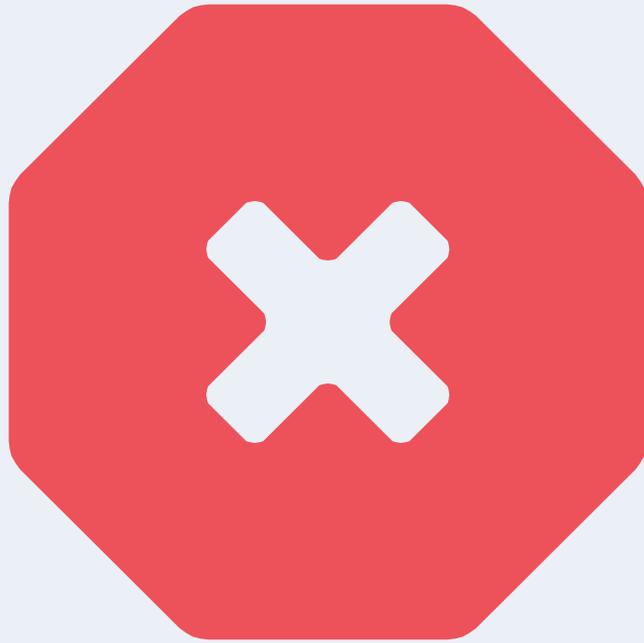
- Required
- Factual
- Inspectable
- Buyer-centric

Sales Process Stage Standards

- Required
- Factual
- Inspectable
- Buyer-centric

REQUIRED

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

INSPECTABLE

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.

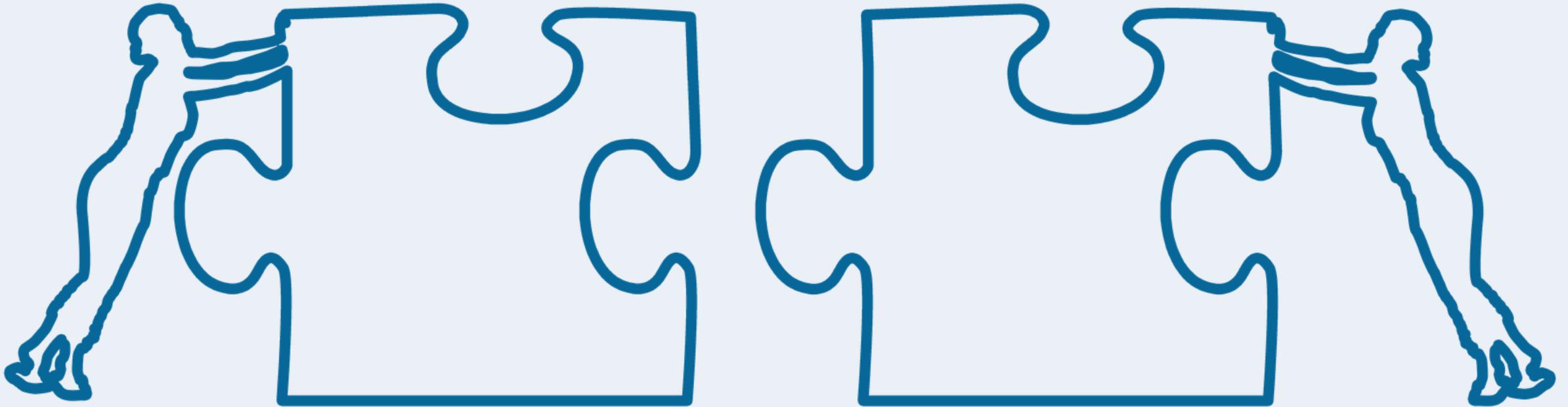
Sales Process Stage Standards

- Required
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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

DEMO

✓ I gave them a demo

Seller-centric

DEMO

✓ I gave them a demo

Buyer-centric

Seller-centric

DEMO

✓ I gave them a demo

Buyer-centric

PRODUCT EVALUATED

Seller-centric

DEMO

✓ I gave them a demo

Buyer-centric

PRODUCT EVALUATED

✓ Buyer showed up

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.

Your customers' word-of-mouth
far outweighs your company's
marketing and sales efforts.



FOCUS ON THE ACTIONS THAT
WILL MAKE YOUR CUSTOMERS
STICK AROUND FOR THE LONG
TERM.

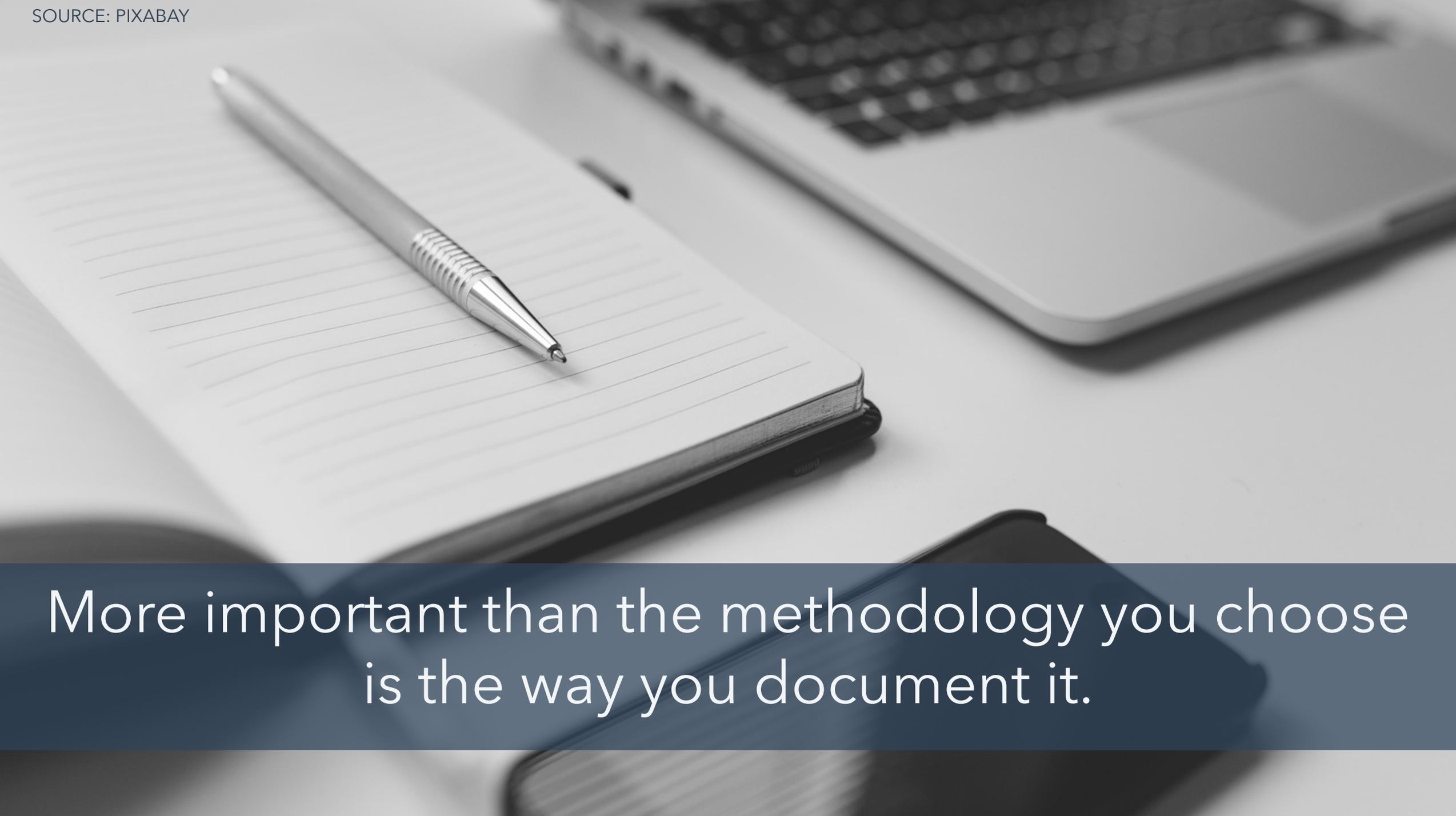
CREATING YOUR SALES PLAYBOOK

A hallway with seven doors set against a wall with a repeating floral pattern. The floor is made of dark wood planks. The central door is bright yellow, while the other six doors are white with black frames. The lighting is soft, creating a slight shadow on the floor in front of the yellow door.

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.

A photograph of a desk setup. In the foreground, a silver pen lies diagonally across an open, lined notebook. The notebook is open to a blank page. In the background, a silver laptop is partially visible, showing its keyboard and trackpad. The scene is lit with soft, natural light, creating a clean and professional atmosphere.

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**

Four Areas a Playbook Should Cover

- What to know
- What to do
- What to **say**

Four Areas a Playbook Should Cover

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

YOUR PLAYBOOK SHOULD
INCLUDE THE **CONTENT** THAT
YOU WANT YOUR REPS
SHARING WITH PROSPECTS
DURING THE SALES PROCESS.

Persona/Pain/Feature/Content Matrix

Persona	Pain	Feature	Content
Persona 1	Pain point 1	Feature 1	Content 1
			Content 2
		Feature 2	Content 3
			Content 4
	Pain point 2	Feature 3	Content 5
			Content 6
	Pain point 3	Feature 4	Content 7
Persona 2	Pain point 1	Feature 1	Content 1
		Feature 2	Content 2
			Content 3
	Pain point 2	Feature 3	Content 4
		Feature 4	Content 5
			Content 6

Persona/Pain/Feature/Content Matrix

Persona
Persona 1

Persona/Pain/Feature/Content Matrix

Persona	Pain
Persona 1	Pain point 1
	Pain point 2
	Pain point 3

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

HUMMING

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.”

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.

THRASHING

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

THANK YOU.

HubSpot Academy