

# Sales Process 101 & Then Some!

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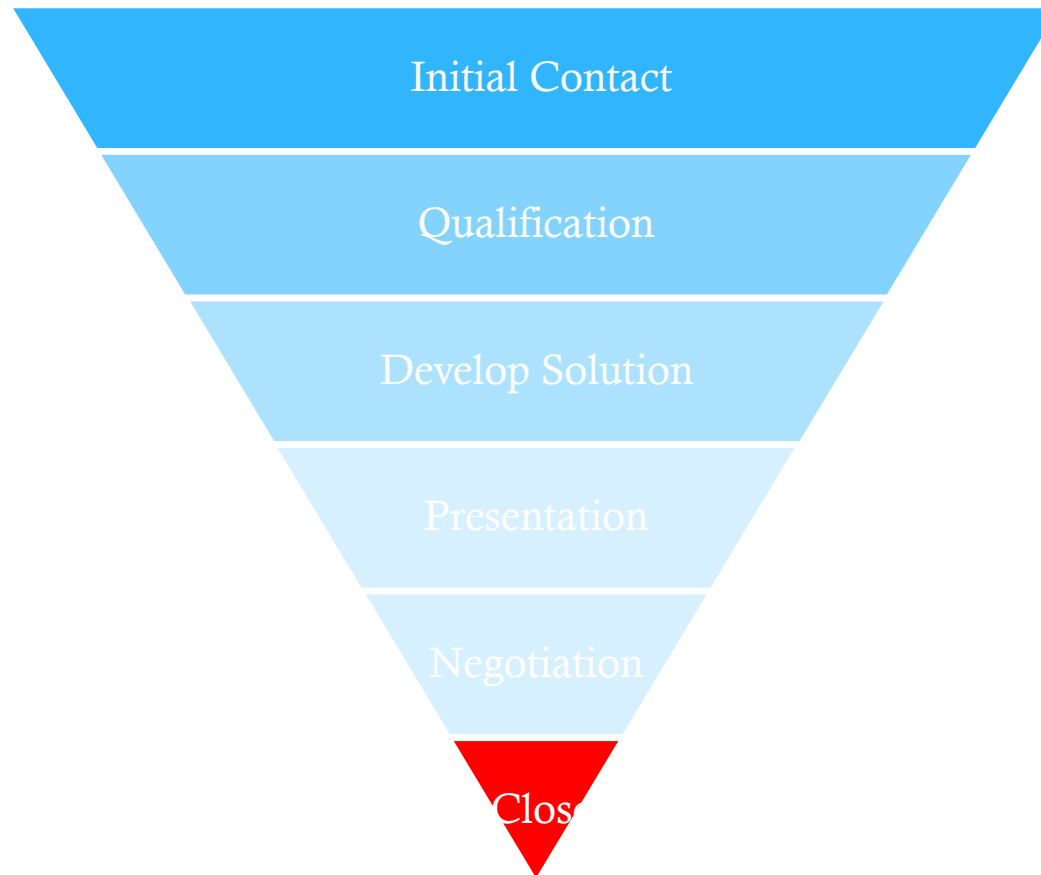
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**Tactical Skills  
for the Growing Business**

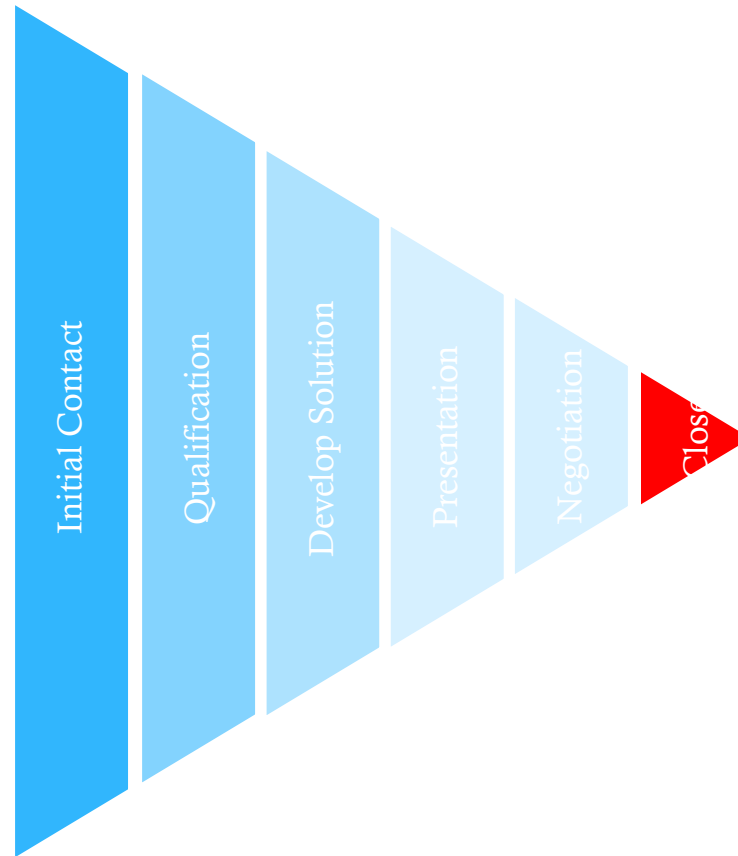


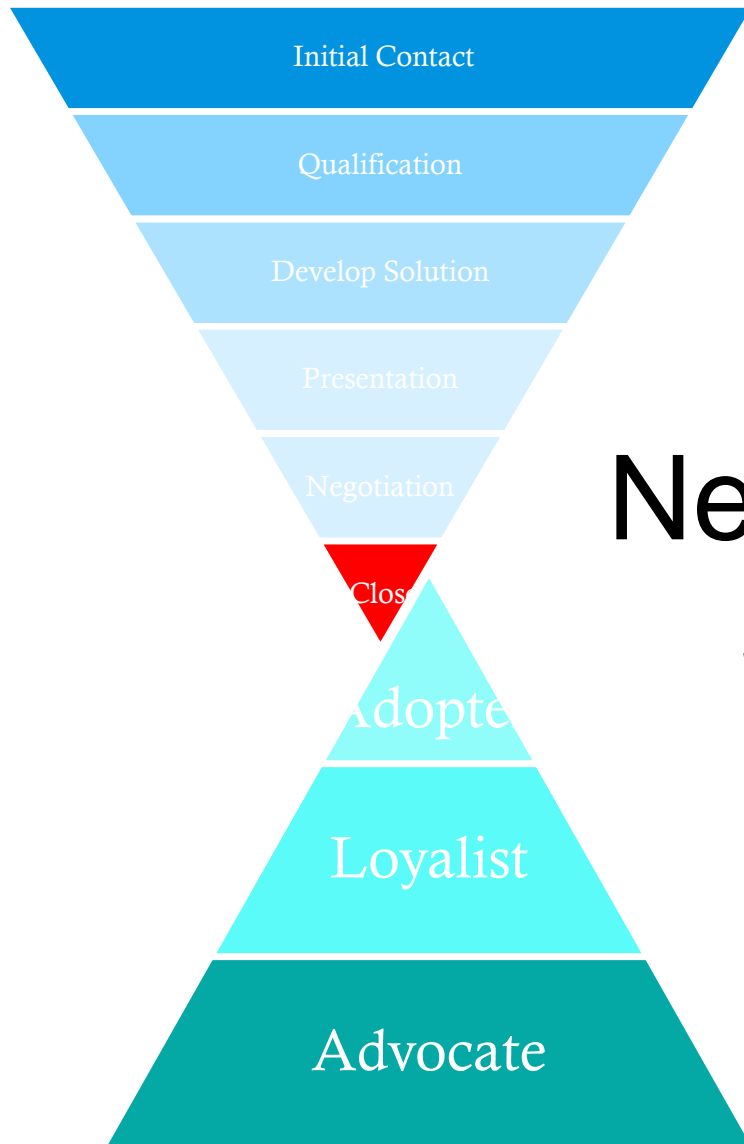
# Sales Funnel





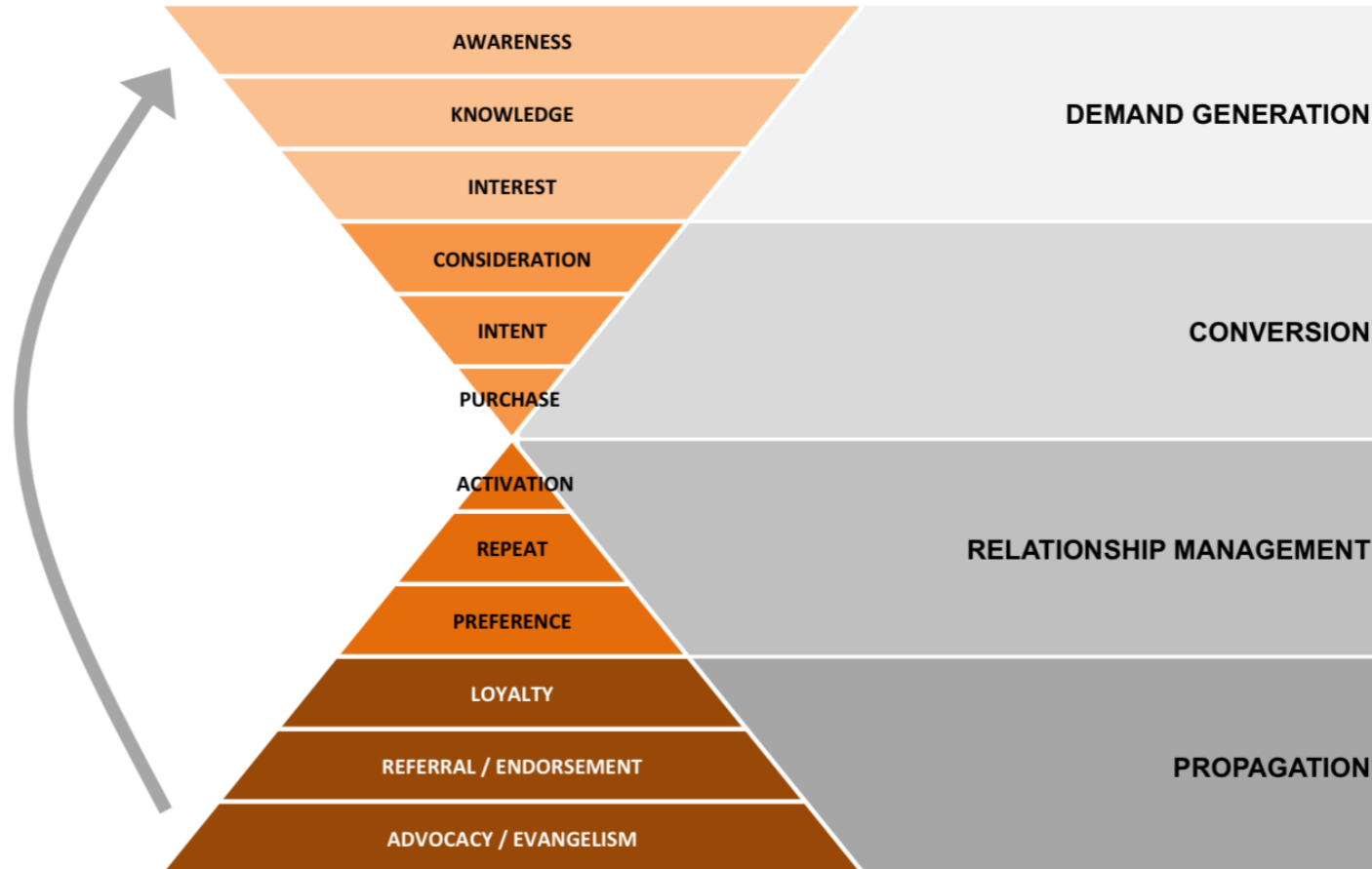
# Sales Funnel Flow





# Newest Version of Sales Funnel

# New Version Detailed



Tactical Skills  
for the Growing Business



# Customer's Buying Cycle





Really a  
Marketing  
Funnel

The  
Funnel  
Starts  
Here!!

Marketing

- Lead Generation
- Brand Awareness

Marketing

- Lead Nurturing
- Drip Campaigns
- Industry Knowledge

Sales

- Prospecting Process
- Qualifying or Disqualifying

Sales

- Close Deals
- Relationship Nurturing
- Retention Management

Define a  
Clear  
Handoff  
Rule!!

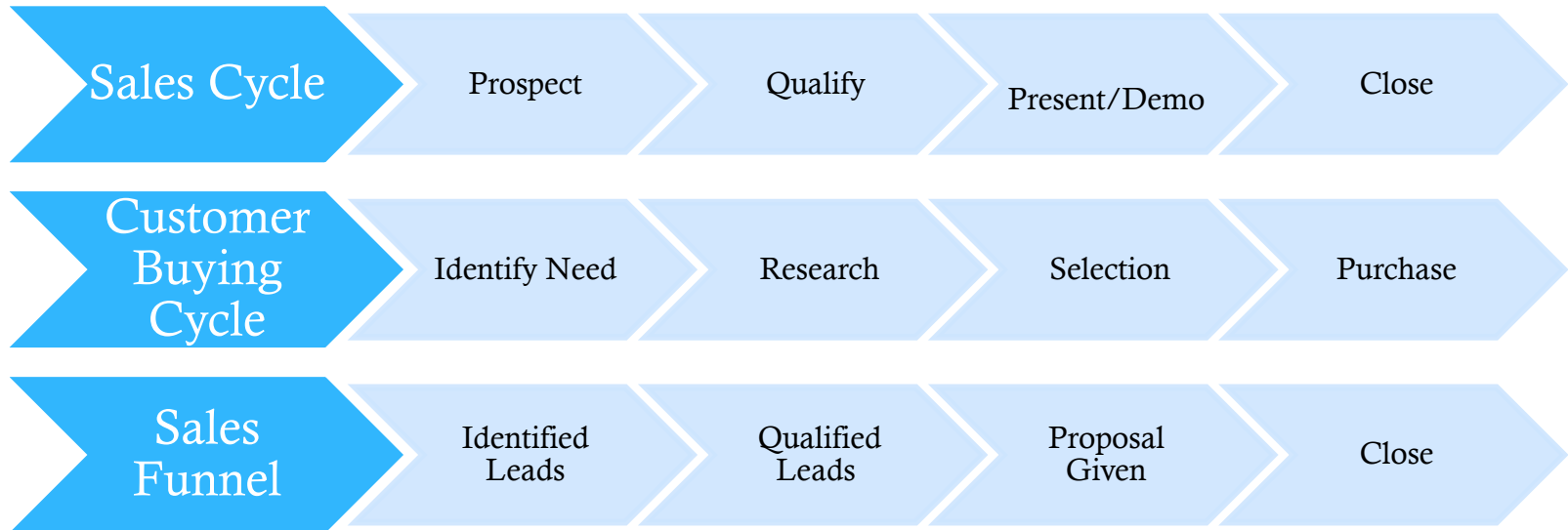
Clear Handoff  
back to  
Marketing!



Tactical Skills  
for the Growing Business



# -The Perfect World-







# 4 Processes:

## **Marketing Process**

(Brand awareness/Education of the market)

## **Lead Generation Process**

(Inbound Marketing/Generating Interest)

# **Prospecting Process**

(Qualifying/Appointment Setting)

# **&**

# **Sales Process**

(Closing Deals/Relationship Management)



**-The Overlap-**

Marketing



Marketing



Customer Buying Cycle



Sales Team





# Prospecting Process



## Example 1:

Combination of Emails and Calls:

*-Intended to schedule an appointment-*

Step 1: Phone Call – Leave an intro voice mail.

Step 2: Email – Send email mimicking the original voice mail.

Step 3: Follow Up Call – Leave a reason to return the call.

Step 4: Email – Send email mimicking 2<sup>nd</sup> call.

Step 5: Follow Up Call – Leave another reason to return call.

Step 6: Email – Send email mimicking 3<sup>rd</sup> call

Step 7: Last Call – Let the prospect know you won't call back.

Step 8: Last Email – Send email mimicking last voice mail left.



# Prospecting Process



## Example 2:

Combination of Emails, Calls, and In-person Visits:  
*-Intended to schedule an appointment-*

- Step 1: Visit the location w/business card only. (Cold Call)
- Step 2: Follow Up Call – Leave VM with reason to return call.
- Step 3: Email – Send email asking for appointment.
- Step 4: Revisit – Bring a flyer or other marketing material.
- Step 5: Follow Up Call – Leave a VM w/2<sup>nd</sup> reason to call back
- Step 6: Email – Send email mimicking 2nd reason to call back.
- Step 7: Revisit – Bring additional marketing material or gift
- Step 8: Follow Up Call – Ask one last time for an appointment



## **POINTS TO REMEMBER:**

1. Throughout this process the goal is to obtain an appointment with the prospect and this may be accomplished on any of the steps above.
2. After step 8 this process should be considered complete or able to be justified to be repeated (for example: if the account is on the top 10% target list, is identified as “ideal”, or has a high lead score...etc.)
3. All steps should be documented in CRM.
4. Once appointment is set the sales process takes over.



# Sales Process



## Example 1:

*-This process is for a lone sales rep-*

Step 1: Follow Prospecting Process

Step 2: Schedule an initial meeting – Qualify or Disqualify the prospect.

Step 3: Schedule a follow up meeting – This will allow you to present your solution.

Step 4: Close

Step 5: Follow up for relationship management purposes.

Step 6: Request Referrals



# Sales Process



## Example 2:

*-This process is for team selling w/a Sales Engineer or PM-*

Step 1: Follow Prospecting Process

Step 2: Schedule an initial meeting – Identify a real need.

Step 3: Schedule a tandem meeting – Bring SE or PM out

Step 4: Set Agenda for the meeting

Step 5: Attend First Meeting – Truly Qualify or Disqualify

Step 6: Schedule an Assessment – To provide details

Step 7: Attend a Proposal Meeting – Present Solution

Step 8: Sign Agreements – Close

Step 9: Delivery of Services – Managed by both Rep & SE/PM

Step 10: Follow Up – Relationship management

Step 11: Request Referrals



# Managing KPI'S & Coaching



Know what your tracking & why!

## **KPI's To Look For/Measure:**

Calls  
Emails  
LinkedIn Connections  
Social Media (tracked per outlet)  
In-Person Visits  
Appointments  
Proposals/Quotes  
Meetings  
Wins  
Losses  
Reasons for BOTH wins & losses





# Managing KPI'S & Coaching



Know what your tracking & why!

## **Coaching Opportunities:**

Look for-

Statistical anomalies

Ratios that are off the standard

Great results (to relay best practices to others)

Conversations on the phone to help improve conversions rates

Opportunities to join in on meetings to help improve closing ratios

Outgoing proposals/quotes to make sure they are to your standard

Small wins to encourage success

Minimize the loses to learning experiences

Useful data in the reasons you win & lose customers/clients

# ANY FINAL QUESTIONS?

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