

Instructions: Write the steps of your sales process below and add a brief description.

1. Prospect

Source leads to contact or gather leads from Marketing.

2. Qualify

Compare the lead to the ideal customer persona.

3. Connect

Call, email, or meet with the prospect.

4. Identify Problem, Pain Points and Needs

Ask the prospect questions to understand their issue. Be an active listener.

5. Present

Tell your story. Present or demo your product/service to stakeholders.

6. Handle Objections

Address any doubts the prospect might have. Provide more information.

7. Present Offer

Draw up a proposal and present to stakeholders.

8. Close

Ask for the order.

9. Deliver Product/Service

See your new customer through fulfillment.

10. Upsell/Cross-Sell/Referral

Follow up with your customer and expand their account over time.

11. Followup. Be able to address any cognitive dissonance.

Don't forget to say, Thank You.