

Do you have a process in place?

Leverage your company's marketing efforts to grow more business by establishing a lead qualification and sales process. You likely already have one, even if you haven't memorialized it in print. Writing it down may help save time. We know it's all about making connections and building relationships, not about getting caught up in data entry and recordkeeping. Outlining your process helps streamline your efforts for optimal effectiveness.

INSTRUCTIONS

- 1) What is the buying process like for your customers? Identify the key activities, milestones, and decision points.
- 2) What sales activity supports that buying process?
- 3) Itemize the steps, or key activities, your sales team must take in order to progress to the next stage in the sales process.

Your sales stages might include:

- Prospecting
- Qualifying
- Initial contact
- Presentation/Demo
- Scope review
- Proposal preparation
- Proposal delivery
- Negotiation
- Agreement/Close

Each sales stage has its own series of sales activities (or steps) to support it. Your sales activities might include:

- Ensuring prospect meets company criteria
- Creating a contact file in your CRM
- Sending introductory email
- Calling
- Sending intro package of marketing materials
- Sending sell sheets or product spec sheets
- Sending proposal
- Scheduling meeting

The buying process

WHO _____ _____ _____	WHO _____ _____ _____	WHO _____ _____ _____	WHO _____ _____ _____
WHAT _____ _____ _____	WHAT _____ _____ _____	WHAT _____ _____ _____	WHAT _____ _____ _____

Sales stages

_____	_____	_____	_____
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Sales steps

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

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