

TEMPLATE FOR CREATING A SALES PROCESS

Make a copy of this template and use it to create your organization's own sales process.

1. Sales Pipeline Template

There's typically nine stages of the sales pipeline, as outlined below. Take a look at your current business model, and identify which areas apply to your organization.



2. Pipeline Activities Template

Based on the stages of your organization's sales pipeline identified above, identify the activities you typically perform for each stage. Replace the italicized text below with your own entries.

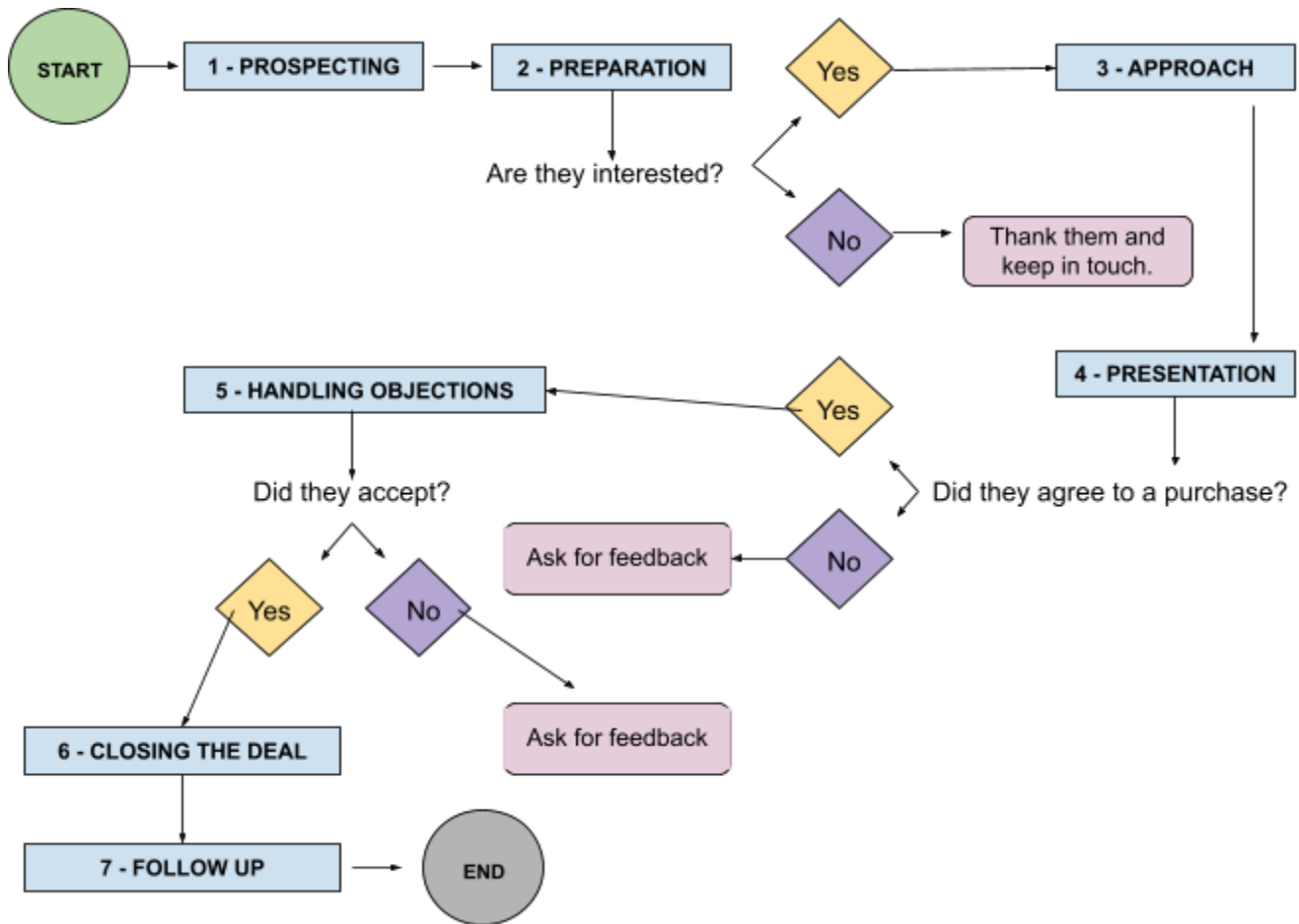
Example: When researching prospects, how do you plan to find potential customers (consumers or businesses, or both) that could benefit from your product or service?

Pipeline Stage	Activities
<i>Researching Prospects</i>	<i>Find and connect with potential decision-makers on LinkedIn</i>
<i>Generating Online Leads</i>	<i>Create an online ad with a web form for inbound lead submissions</i>
<i>Introducing Products or Services</i>	<i>Cold call introduction to leads to set up a demo or free trial</i>
<i>Lead Qualification</i>	<i>Call leads who submitted an online form to determine interest</i>
<i>Nurturing Leads</i>	<i>Deploy a drip email campaign to set up a sales presentation</i>
<i>Delivering Sales Presentations</i>	<i>Deliver a product sales presentation</i>
<i>Sending Proposals or Quotes</i>	<i>Acquire information needed to generate and send a personalized quote proposal</i>
<i>Negotiating Terms</i>	<i>You and your legal team review proposal change requests and send revision(s) to the prospect</i>
<i>Closing the Deal</i>	<i>Acquire signatures on the proposal and start client onboarding</i>

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3. Sales Process Flow Chart Template

Visualize your sales process by using flowcharts differentiated with shapes and colors that guide the viewer down the path from start to finish. The sales process needs to consider activities that can be completed right away, as well as those which are dependent on a prior task.



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4. Sales Pipeline Performance Metrics Template

After identifying all your pipeline stages and the activities that go with each, list down performance metrics to assess success rate of each stage. Replace the italicized text below with your own entries.

Sales Pipeline Stage	Sales Process Step/Activity	Performance Metric(s)
<i>Researching Prospects</i>	<i>Find and connect with potential decision-makers on LinkedIn</i>	<i>Total number of connections made</i>
<i>Generating Online Leads</i>	<i>Create an online ad with a web form for inbound lead submissions</i>	<ul style="list-style-type: none"> ● <i>Total number of leads generated</i> ● <i>Ad views to lead submission rates</i>
<i>Introducing Products or Services</i>	<i>Cold call introduction to leads to set up a demo or free trial</i>	<ul style="list-style-type: none"> ● <i>Total number of demos set up</i> ● <i>Call to demo conversion rate</i>
<i>Lead Qualification</i>	<i>Call leads who submitted an online form to determine interest</i>	<ul style="list-style-type: none"> ● <i>Total number of leads qualified</i> ● <i>Calls to qualified lead conversion rate</i> ● <i>Average number of calls needed to qualify a lead</i>
<i>Nurturing Leads</i>	<i>Deploy a drip email campaign to set up a sales presentation</i>	<ul style="list-style-type: none"> ● <i>Emails sent to open rates</i> ● <i>MQL to SQL conversion rates</i>
<i>Delivering Sales Presentations</i>	<i>Deliver a product sales presentation</i>	<ul style="list-style-type: none"> ● <i>Presentation to proposal conversion rate</i> ● <i>Average time spent on presentations</i>
<i>Sending Proposals or Quotes</i>	<i>Acquire information needed to generate and send a personalized quote proposal</i>	<i>Average number of proposals sent per month (or per week, quarter, and so forth)</i>
<i>Negotiating Terms</i>	<i>You and your legal team review proposal change requests and send revision(s) to the prospect</i>	<ul style="list-style-type: none"> ● <i>Average length of time spent in negotiations</i> ● <i>Average number of revisions</i>
<i>Closing the Deal</i>	<i>Acquire signatures on the proposal and start client onboarding</i>	<ul style="list-style-type: none"> ● <i>Proposal to closed deal conversion rates</i> ● <i>Average number of closed deals per month</i>