

Get Organized

SALES PROCESS WORKSHEET

A sales process is a set of repeatable steps that your sales team follows to convert prospects into customers. Use this worksheet to define your sales efforts and build a roadmap for your success.

INSTRUCTIONS

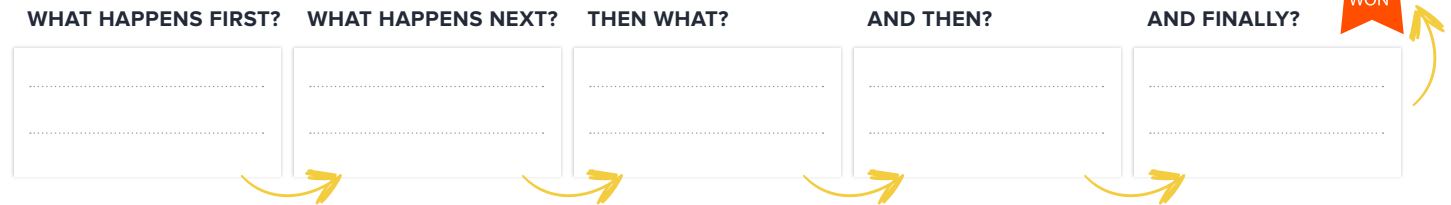
- Write down the key buyer activities, milestones, and decisions that **need to take place** through the course of every sale.
- Choose a series of **sales stages** to support that buying process—between 3–7, depending on the complexity of the sale. Typical stage names include:
 - Prospect
 - Make Contact
 - Qualify
 - Research
 - Pitch
 - Propose
 - Get Signature
 - Close
 - Check-In
 - Upsell

Note: Each stage should have a **goal** that reps must complete before the lead moves forward. What's the specific action or agreement that must be reached in each stage?

- For each stage, **list the tasks** that your sales team must complete to accomplish the stage goal. Some typical tasks include:
 - Call new lead
 - Prepare for meeting
 - Conduct web demo
 - Fill out proposal

Optional: Do you assign leads to your sales reps based on territory, product line, value, or other criteria? **Think about the rules** you currently use to distribute each new lead to the rep who's most likely to close it. (You can automate these rules in CRM.)

Your Customer's Buying Process



Your Sales Stages (aka Your Pipeline)

* To add pipeline stages, lead assignments, goals, and tasks in CRM, go to your [Sales Automation](#) page

WHO DOES THIS?	WHO DOES THIS?	WHO DOES THIS?	WHO DOES THIS?	WHO DOES THIS?
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
STAGE GOAL	STAGE GOAL	STAGE GOAL	STAGE GOAL	STAGE GOAL
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
TASKS	TASKS	TASKS	TASKS	TASKS
<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/> <input type="text"/>
<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/> <input type="text"/>
<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/> <input type="text"/>