



The Methodical Sales Process

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II. Sales SWOTs

Strengths

❖ ...

Weaknesses

❖ ...

Opportunities

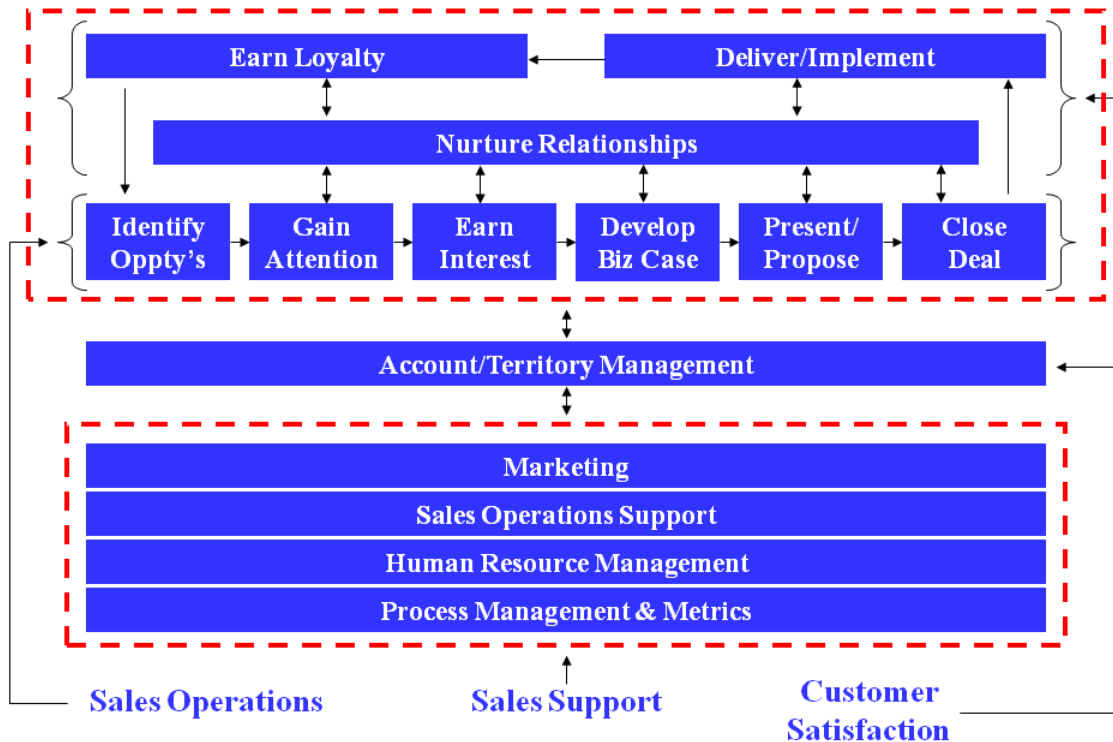
❖ ...

Threats

❖ ...

III. Methodical Sales Process

Methodical Sales Process





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IV. Methodical Sales Process - Sales Operations

Identify Opportunities

- ❖ Completion Criteria
 - ???Opportunity description & Decision maker contact information is documented???
 - ???
 - ???

- ❖ Metrics
 - ???
 - ???
 - ???

- ❖ Best Practices
 - ???
 - ???
 - ???

- ❖ Tools
 - ???
 - ???
 - ???

Segmentation Information

- ❖ Segment #1 - Ideal Customer Profile
 - Key Segment Characteristics That Are Favorable to us (i.e., What They Do) (This is the key field)
 - ???
 - Common Business Problems of This Segment That us Can Address
 - ???
 - Primary Applications/Products/Services to Sell
 - ???
 - Value we Can Deliver
 - ???
 - Primary Departments & Personnel to Call On
 - ???
 - Case Studies (i.e., specific, detailed examples)
 - ???
 - Other Info
 - Revenue
 - Number of Employees



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- Number of Locations
- ...

Competition

- ❖ Competitor #1
 - What They Sell
 - Their Key Segments
 - Strengths
 - Weaknesses

Gain Prospects' Attention

- ❖ Completion Criteria
 - ???First face-to-face call has been scheduled???
 - ???
 - ???
- ❖ Metrics
 - ???
 - ???
 - ???
- ❖ Best Practices
 - ???
 - ???
 - ???
- ❖ Tools
 - ???
 - ???
 - ???

Establish Prospect's Interest

- ❖ Completion Criteria
 - ???Decision maker is committed to DO something that will advance progress toward closing the sale???
 - ???
 - ???
- ❖ Metrics



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- ???
- ???
- ???

❖ Best Practices

- ???
- ???
- ???

❖ Tools

- ???
- ???
- ???

Develop Business Case

❖ Completion Criteria

- ???All information required to create a proposal has been gathered
- ???
- ???

❖ Metrics

- ???
- ???
- ???

❖ Best Practices

- ???
- ???
- ???

❖ Tools

- ???
- ???
- ???

Present/Propose

❖ Completion Criteria

- ???Proposal has been delivered to decision maker and influencers???
- ???Presentation of proposal has been scheduled???
- ???



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❖ Metrics

- ???
- ???
- ???

❖ Best Practices

- ???
- ???
- ???

❖ Tools

- ???
- ???
- ???

Close

❖ Completion Criteria

- ???The check cleared???
- ???
- ???

❖ Metrics

- ???
- ???
- ???

❖ Best Practices

- ???
- ???
- ???

❖ Tools

- ???
- ???
- ???



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V. Methodical Sales Process - Customer Satisfaction

Deliver/Implement

- ❖ Completion Criteria
 - ???Customer has formally signed off on the fact that expectations have been met???
 - ???
 - ???

- ❖ Metrics
 - ???
 - ???
 - ???

- ❖ Best Practices
 - ???
 - ???
 - ???

- ❖ Tools
 - ???
 - ???
 - ???

Build Loyalty

- ❖ Completion Criteria
 - ???Formal Customer Satisfaction rating is less than 6 months old???
 - ???
 - ???

- ❖ Metrics
 - ???
 - ???
 - ???

- ❖ Best Practices
 - ???
 - ???
 - ???

- ❖ Tools



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- ???
- ???
- ???

Develop Customer Relationships

❖ Completion Criteria

- ???Formal client relationship rating is less than 12 months old???
- ???
- ???

❖ Metrics

- ???
- ???
- ???

❖ Best Practices

- ???
- ???
- ???

❖ Tools

- ???
- ???
- ???

Account & Territory Management

❖ Completion Criteria

- ???Never???
- ???
- ???

❖ Metrics

- ???
- ???
- ???

❖ Best Practices

- ???
- ???
- ???



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- ❖ Tools
 - ???
 - ???
 - ???

VI. Methodical Sales Process - Sales Support

Marketing

- ❖ Completion Criteria
 - ???Never???
 - ???
 - ???

- ❖ Metrics
 - ???
 - ???
 - ???

- ❖ Best Practices
 - ???
 - ???
 - ???

- ❖ Tools
 - ???
 - ???
 - ???

Sales Operations Support

- ❖ Completion Criteria
 - ???Never???
 - ???
 - ???

- ❖ Metrics
 - ???
 - ???
 - ???



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❖ Best Practices

- ???
- ???
- ???

❖ Tools

- ???
- ???
- ???

Human Resources Management

❖ Completion Criteria

- ???Never???
- ???
- ???

❖ Metrics

- ???
- ???
- ???

❖ Best Practices

- ???
- ???
- ???

❖ Tools

- ???
- ???
- ???

Process Management & Metrics

❖ Completion Criteria

- ???Never???
- ???
- ???

❖ Metrics

- ???
- ???
- ???



As of January 12, 2012

❖ Best Practices

- ???
- ???
- ???

❖ Tools

- ???
- ???
- ???

VII. The Customer Decision Process

Develop Strategic Plan

Define and Execute Business Processes

Address Problems

Form Needs and Set Priorities

Identify Alternatives

Evaluate Alternatives

Make Decision

VIII. Sales Tools

Value Propositions & Differentiators

- ❖ ???

Case Studies & References

- ❖ ???

Marketing Materials

- ❖ ???



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Call Scripts

- ❖ ???

Common Customer Issues

- ❖ ???

Objections & Responses

- ❖ ???

Sample Proposals & Boilerplate

- ❖ ???

Presentations

- ❖ ???

Sample KAPS Reports

KAPS stands for Key Account Performance Summary. A KAPS Report is typically produced annually for each key account. It reminds a customer of past issues, explains what you have done, highlights the results you have produced and the value you have delivered and finally, lays out what you intend to do next. Here's an outline:

- ❖ Customer Issues & Objectives as of the last KAPS
- ❖ Customer Expectation as of the last KAPS
- ❖ Your Key Initiatives since the last KAPS
- ❖ Bios of all those involved in the above
- ❖ Other resources applied to this customer since the last KAPS
- ❖ Results & Value Delivered since the last KAPS
- ❖ Expectations Met & Missed since the last KAPS
- ❖ Your view of the Customer's Current Issues, Objectives & Expectations
- ❖ Your Action Plan for the coming year

Information Technology

- ❖ Laptop PC
- ❖ "CRM" System (Customer Relationship Management – sometimes also known as SFA or Sales Force Automation)
- ❖ PDA (Personal Digital Assistant)
- ❖ Cell phone
- ❖ GPS (Geographical Positioning Satellite) for mapping & driving directions

IX. Sales Education and Training

- ❖ ???