Area’s Of the Sales Process

**PLANNING AND STRATEGIZING ACTIVITIES**

* Maintaining Pipeline - updating and tracking opportunities
* Creating Timelines - creating milestones to pursue opportunities
* Estimating Forecast of Opportunities - calculating expected revenue against targets
* Reviewing Plans with Management - meeting with manager to review sales plan, milestones, and actions taken
* Business Review - analyzing engagement data and/or reports
* Data Cleaning and Upkeep - removing duplicate data and reconciling errors
* Internal Business Reviews - identifying at-risk accounts, assessing account performance, and reviewing with managers
* Prioritizing Account Engagement Efforts - getting buy-in from internal teams and identifying areas of intervention/course correction
* Delivering Customer Account Reviews - conducting account reviews with customer and aligning account priorities with customer stakeholders

**PROSPECTING ACTIVITIES**

* Cold Calling/Outreach - Calling via phone or social media for lead generation purposes
* (include prep time)
* Qualifying Leads - Conducting lead qualification for new or existing business
* (include pre- and post- conversation qualifying activities)
* Conducting Field Research and Gathering Buyer Intelligence - Scouting a customer site, researching customers, stakeholders, competitors, and marketing and industry news via databases and public information
* Attending Industry Events - Trade shows, meet & greets and networking events
* Reassessing Leads - Reassessing qualified leads
* Conducting Sales Engagement - Customizing and conducting digital customer outreach
* Driving Sales Campaigns and Strategic Initiatives - Working w/ marketing to align account-based marketing (ABM) efforts and events with commercial priorities
* Identifying and Expanding Account Opportunities - Advancing and managing expansion cross/upsell opportunities
* Expanding and Elevating Customer Relationships - Account targeting to increase client relationships via calls/emails and elevate C-suite relationships

**CUSTOMER MEETING PREPARATION ACTIVITIES**

* Researching Customer Meeting Participants - researching participants to strategize meeting and identifying influencers in customer buying group that can advance deals
* Obtaining Customer Collateral - acquiring pitch decks, commercial messaging, and sales collateral from your sales enablement team
* Tailoring Customer Collateral - customizing collateral to buying group's priorities, preparing FAQs and responses
* Aligning with Internal Stakeholders on Call Strategy - aligning with product teams, subject matter experts, and sales manager
* Handling Customer Meeting Logistics - confirming meetings, sharing agendas and relevant resources
* Presentation Prep and Delivery - rehearsing commercial messaging and identifying disconnects within buyer group
* Creating a Success Roadmap - drawing a roadmap for customer to drive solution adoption and utilization

**SALES CALL ACTIVITIES**

* Establishing Credibility - qualifying opportunities by understanding customer's goals, mission-critical priorities, key initiatives, and challenges
* Establishing a Need for Change - breaking down status quo, identifying unrecognized opportunities, and illustrating the problem(s) the organization faces
* Aiding Customer Decision-Making - reconciling solutions, resolving conflicting information, providing tools for customer to self-evaluate offerings and frame business case
* Helping Customer Build Stakeholder Consensus - helping customer align stakeholder priorities, and providing collateral to stakeholders for their internal presentations
* Sharing Call Summary - explaining next best actions, assigning next steps to customer stakeholders, and providing additional resources
* Following Up after Sales Call - revisiting next best actions to ensure deal progress

**PRICE NEGOTIATION & CONTRACT COMPLETION ACTIVITIES**

* Creating Quotes - generating quotes
* Setting Negotiation Milestones - tracking and locking-in progress
* Contract Generation - creating and modifying contracts and establishing timelines with internal stakeholders to draft/review
* Justifying Pricing - justifying pricing to client buying group
* Seeking Approvals - seeking internal approvals (from your financial and/or legal teams) or exceptions requested by customer
* Facilitating Client's Implementation Process - introducing implementation team, reviewing client's resources, and monitoring the process
* Following Up after Closing Opportunity - facilitating conversations with the client after closing opportunity
* Acquiring Testimonials - asking for customer testimonials

**NON-SELLING ACTIVITIES**

* Logging Opportunity Updates - updating CRM and ISR (if applicable)
* Creating Sales Reports - preparing sales reports for manager consumption and attending internal meetings
* Traveling - traveling to and from customers, booking travel and logging expenses
* Attending Meetings - attending internal meetings
* Coaching Sessions - completing coaching conversations with manager
* Attending Training - completing courses, certifications and training sessions (product, sales skills, processes, human resources)
* Mentoring other Sellers - sharing best practices and strategies with other Salespeople
* Monitoring Customer Account Health - tracking customer satisfaction metrics, account growth, account size, partnership tiers, and product adoption/utilization
* Delivering Routine Customer Support - educating client during life cycle and notifying clients of product changes (operational /business/management changes)
* Taking Escalation Calls - handling escalation calls for critical customer issues
* Providing Actionable Input to Internal Teams - sharing input and client feedback with marketing, customer success, and product management teams