

## Introduction: The Sales Development Methodology

This document constitutes the comprehensive knowledge base and official methodology for our sales development team. It is our "single source of truth" that standardizes our approach at every stage—from high-level strategy and concrete processes to individual sales skills.

The purpose of this document is to provide every team member with the clarity, consistency, and tools necessary to achieve mastery in their role.

### How to Use This Document

The document is divided into three main sections that answer the key questions: **WHY** (our philosophy and skills), **WHO & WHERE** (our market strategy), and **HOW** (our processes and tools).

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## Table of Contents & Section Guide

### Section 1: The Foundation – Philosophy & Core Sales Skills

This section focuses on the individual competencies that form the basis of our effectiveness. It answers the question: "What skills must I master to be a world-class salesperson?"

- **Material: "11 Years of Sales Knowledge In 25 Minutes"**
  - **Contents:** A collection of 13 key skills every salesperson must master. It covers topics such as building trust and authority, conducting effective discovery, proactively preventing objections, and perfectly structuring sales calls.

### Section 2: The Strategy – Defining Our Market & Customer

This section defines our go-to-market strategy. It answers the questions: "Who do we sell to?", "Where do we find them?", and "What language should we use to resonate with them?"

- **Material: "100% clarity on your target personas and target verticals"**
  - **Contents:** The detailed **"Market Mapping" framework**. This guide shows how to deeply analyze our target verticals and buyer personas. Applying this method allows us to "speak the customer's language," which is the key to building trust and effectively positioning our offer.

### Section 3: The Execution – Processes, Tools & Scaling

This section is our operational manual. It describes how we execute our strategy in practice, day by day. It answers the question: "What exactly does our sales engine look like and how does it work?"

- **Material: "Everything I know about designing a sales process" (Two Versions)**

- **Contents:** This is the architectural blueprint for our sales process. It presents the fundamental principles (Objective, Flexible, Measurable) and our official structure: **Deal Stages**, **Meetings within Stages**, and **Exit Criteria**. Mastering this material is crucial for ensuring data consistency and a predictable funnel. Both versions cover the same core framework but include different, valuable Q&A sessions.
- **Material: "Sales Playbook"**
  - **Contents:** This is our primary operational document that systematizes and consolidates all other elements. It describes how to build and maintain a complete Sales Playbook, which is essential for effectively onboarding new team members and scaling the entire operation.

## Material Breakdown: Designing a Sales Process

**Original Title:** "Everything I know about designing a sales process" **Core Premise:** Creating a repeatable, measurable, and objective sales process is crucial for scaling a sales team, ensuring consistent results, and making data-driven decisions. However, this process must be flexible enough to adapt to the customer's buying process.

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### Part 1: Problems Addressed by a Structured Sales Process

A well-designed sales process addresses three fundamental challenges within sales teams:

1. **Lack of Consistency Across Reps:**
  - Different reps intuitively use their own methods, leading to inconsistent results.
  - The absence of a unified standard makes it impossible to reliably assess performance and identify best practices.
  - This complicates the onboarding of new team members.
2. **Constantly Changing Processes:**
  - Especially for founders or the first salespeople, the process is often chaotic and based on "feel," which only works up to a certain point.
  - As the team grows, the lack of a defined framework leads to uncertainty and a lack of repeatability.
3. **Lack of Data for Optimization:**
  - Without defined stages and criteria, you cannot measure the conversion rates between them.
  - Decisions are based on anecdotes rather than hard data, making it impossible to identify the real bottlenecks in the process.

- **The ultimate goal:** To create a clear link between the **actions** reps take and the **outcomes** they achieve.
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## Part 2: The Three Core Principles of Sales Process Design

Every effective sales process must be built on three pillars:

### 1. **Objective:**

- The definitions for each stage must be crystal clear and leave no room for interpretation.
- **Example of a problem:** One rep moves a deal from "Discovery" to "Demo" when the demo is **completed**. Another moves it when the demo is **scheduled**. This generates completely different data and distorts the view of the funnel.
- **Solution:** There must be zero debate about whether a deal qualifies to move to the next stage.

### 2. **Flexible:**

- The sales process **cannot be forced** upon the customer. It must be adapted to their buying process.
- The salesperson should educate the customer and guide them through the steps but be prepared for modifications.
- The higher the contract value (ACV), the more complex the customer's buying process and the greater the need for flexibility.

### 3. **Measurable:**

- It is essential to precisely measure the conversion (drop-off) rate between each stage.
  - Measurability allows you to identify the exact point in the process where you are losing the most deals.
  - **Example:** If there's a large drop-off between Stage 1 and Stage 2, you know the problem lies within the activities of Stage 1 (e.g., the discovery call script), not at the end of the process.
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## Part 3: The "Sales Process Designer" Framework

This is a methodology that breaks down the sales process into three key components.

### Component 1: Deal Stages

- **Definition:** Labels in your CRM that represent key milestones in the customer's journey from first contact to close.
- **Purpose:** To identify bottlenecks by analyzing the conversion rates between stages.
- **Common Mistake:** Using overly generic or default CRM stages (e.g., "Qualification -> Demo -> Closed"). Such a breakdown doesn't provide useful information. If there are 3 different meetings between the demo and the close, you don't know which one is failing.

- **Best Practice:** Stage names should reflect the **actual** sales process in your company and be tailored to its complexity.

## Component 2: Meetings within Stages

- **Definition:** The specific interactions (calls, demos, workshops) that must take place to complete a given stage.
- **Purpose:** To map out all possible actions a salesperson needs to take. This allows you to build the process like "Lego blocks," adapting it to the customer's needs.
- **Practice:** For each Deal Stage, create a list of possible meetings, marking which are **mandatory** and which are **optional**.
- **Additional Benefit:** This helps in assessing rep capacity. A rep with 12 deals in a stage requiring 4 meetings has less bandwidth than a rep with 12 deals in a stage with just one meeting.

## Component 3: Exit Criteria

- **Definition: The most important element.** A set of objective conditions that **must** be met for a deal to be moved from one stage to the next.
- **Purpose:** To ensure 100% data consistency in the CRM and eliminate subjective judgments.
- **Rules for Good Exit Criteria:**
  - **They are Objective:** No room for "I feel like..." They are binary facts (yes/no).
  - **They are Required:** All items on the list must be completed (except those marked as optional).
  - **They are Followed: No stage skipping.** Every deal must follow the defined path.
- **Specific Example of Exit Criteria:**
  - **From Stage 1 (Discovery) to Stage 2 (Demonstration):**
    1. The Discovery Call has been **conducted**.
    2. The Demo meeting has been **SCHEDULED** on the calendar.  
(Keyword: scheduled, not just promised in an email).

## Part 4: Q&A Session - Key Takeaways

1. **How to implement coaching and training based on the process?**
  - Data from the process tells you where the problem is. If the conversion from "Discovery" to "Demo" is low, you should listen to discovery calls and conduct training based on what you hear.
  - Data allows you to pinpoint what to coach on, instead of guessing.
2. **What are the industry benchmarks for sales metrics?**
  - Benchmarks are often useless because every company defines its stages differently. It's more important to compare your results against your own past performance.
  - **General, example benchmarks:**
    - **Win Rate (SMB Software):** 30-40%
    - **Win Rate (Mid-Market):** approx. 25%

- **Win Rate (Enterprise):** approx. 15%
  - **Show-up Rate (meetings booked vs. attended):** 60-70% for SMB, 75-85% for Mid-Market/Enterprise.
- 3. **How to transition from a conversation to asking for a meeting on a cold call? (A very practical tip)**
  - **Step 1: Recap:** "Okay, so if I understood correctly, the problem is [problem X], and the ideal solution would be [solution Y]. Is that an accurate summary?" -> Wait for confirmation.
  - **Step 2: Value Proposition:** "That's exactly how we help companies like yours. We build processes that [deliver value Z]."
  - **Step 3: Direct Ask:** "I suggest we set aside [X minutes] so I can show you exactly how it works. How does tomorrow at 10 AM look for you?"
- 4. **What are 2-3 key metrics to track in a sales process (besides Win Rate)?**
  - **Conversion drop-off between Stage 1 and Stage 2:** The biggest lever for optimization, as it impacts the entire rest of the funnel.
  - **Distribution of Closed-Loss Reasons:** Analyzing why you **truly** lose deals (not just "lost to competitor," but *why*—price, features, etc.).
  - **Time in Stage:** Shows where deals get "stuck." Helps reps disqualify unpromising deals faster.

## Sales playbook

**Original Title:** "Sales Playbook" **Core Premise:** A Sales Playbook systematizes your sales process. Its purpose is to create a process so reliable and effective that you can hire average salespeople, have them execute it, and see them succeed. This allows you to ramp up reps faster, achieve more consistent performance, and effectively scale the sales organization.

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### Part 1: The Core Philosophy - Process Over People

1. **The "Hire and Hope" Fallacy:**
  - Most sales organizations make the mistake of hiring a salesperson and hoping that person will bring a magical process with them.
  - This often fails because the vast majority of sales organizations are not run well, and a rep's past experience may not be applicable or effective.
  - The goal is to move away from "hiring a closer" and instead build a system for the closer to execute.
2. **The Goal: A Process That Enables Success:**
  - A strong, documented process is the foundation. It should be so effective that even an average salesperson can follow it and hit their numbers.
  - You should still strive to hire the *best* talent, but the process ensures a high baseline of performance and reduces risk.
3. **The Playbook as a "Baseline" for Iteration:**

- A sales playbook is not a static document. It's a living baseline that documents your current best practices.
  - As the team learns, refines strategies, and improves, the playbook is updated. This creates a cycle of continuous improvement.
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## Part 2: The Anatomy of a Sales Playbook

The playbook is divided into two main sections: **I. Company Overview (Who We Are)** and **II. Roadmap to Success (How We Sell)**.

### Section I: Company Overview (Who We Are)

This section provides the foundational knowledge a rep needs to understand the business context.

- **About Us & Company Values:** The company's mission and core principles.
- **Organizational Chart:**
  - Critical for understanding who does what and who to leverage internally.
  - **Key Insight:** Top-performing reps are often masters at leveraging internal resources and relationships across different departments to close complex deals.
- **Products & Pricing:**
  - A clear breakdown of what you sell, including different tiers, components, and pricing models.
  - For complex enterprise sales, this might include calculators or guides for building proposals.
- **Target Audience (Who We Help):**
  - **Ideal Client Profile (ICP):** A clear definition of your best-fit customer.
  - **Market Mapping:** Understanding different verticals and their unique challenges.
  - **Buyer Personas:** Detailing the roles, responsibilities, and pain points of the people you sell to within those companies.
- **Case Studies & Testimonials:**
  - A repository of success stories, examples, and social proof.
  - This gives reps authority and helps them build trust by showing they've solved similar problems for other clients.
- **Value Proposition & Differentiators:**
  - A clear, concise explanation of the value you provide and what makes you different from competitors.
  - **Key Insight:** Most companies do not have this as well-defined as they believe.

### Section II: Roadmap to Success (How We Sell)

This section is the tactical guide to executing the sales process.

- **The Sales Process (Prospect Journey Mapping):**

- A step-by-step outline of the prospect's journey, from the first touchpoint to becoming a customer.
- This should be mapped out for different lead sources (e.g., **inbound** vs. **outbound**).
- **Lead Management:**
  - A flowchart explaining how leads are handled using **Lead Statuses** in the CRM.
  - **Recommended Statuses:** Open, Working, Connected, Disqualified, Bad Data, Nurture, Open Deal.
  - A disciplined approach to lead statuses is critical for preventing lead decay and maintaining data hygiene.
- **Key Sales Methodologies & Guides:**
  - **Qualification Methodology:** The framework used to qualify prospects (e.g., BANT, MEDDIC).
  - **Discovery Guide:** A set of questions and a structure for running effective discovery calls.
  - **CRM Setup Guide:** Instructions on how the CRM is organized and how it should be used.
- **Sales Messaging & Cadences:**
  - A central repository for all approved sales messaging. This can be a separate, frequently updated document (e.g., a spreadsheet) linked from the playbook.
  - **Includes:** Cold call scripts, cold email templates, follow-up sequences, messaging for events, reactivation campaigns for lost opportunities, etc.
- **"Buy Again" Strategy (Post-Sale & Expansion):**
  - Outlines the customer lifecycle after the initial sale.
  - **Includes:** Onboarding process, customer health checks, and the process for renewals and upsells.
  - **Key Insight:** Sales reps should understand this even if they aren't directly involved in renewals, as it gives them context for the entire customer relationship.
- **Tech Stack (Tools to Support You):**
  - A list of all tools used by the sales team.
  - **Author's Philosophy:** Keep the tech stack as lean as possible. Adding too many tools often slows down performance rather than improving it.
  - **Non-Negotiable "Must-Haves":**
    1. **CRM**
    2. **Data Provider** (e.g., ZoomInfo) - Invest in the highest quality data you can afford.
    3. **Call Recording Software** (e.g., Gong, Chorus) - This is essential for coaching and improvement.
  - **Controversial Opinion:** Automated, multi-channel sequencing tools for cold outreach are often a waste of time for SDRs. The focus should be on mastering one channel (like cold calling) before adding complexity.
- **Onboarding Guides & Checklists:**
  - 30-60-90 day plans and checklists for new hires.
- **Performance Culture:**

- **Key Performance Indicators (KPIs):** Defines the metrics reps are held accountable to (e.g., meetings booked, deals closed, calls made).
  - **Daily/Weekly Activity Tracker:** Reps should manually fill out a simple spreadsheet with their daily activity. **Reasoning:** While this data is in the CRM, manual entry makes the numbers "real" for the reps, fosters direct accountability, and helps them see daily progress.
  - **Quota & Compensation Plan:** A clear explanation of their goals and how they are calculated.
  - **Performance Management:** Outlines the process for handling underperformance, including a **Performance Improvement Plan (PIP)**.
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## Part 3: Implementation & Key Q&A Insights

- **How to Implement the Playbook:**
  - **If you already have a team:** Start by documenting the *current* best practices with them. Get their input and involvement.
  - Formalize these practices into the playbook structure.
  - **Roll it out:** Use the playbook to onboard all new hires.
  - **Use it as a coaching tool:** When a rep asks a question, refer them to the relevant section of the playbook and review it with them. This reinforces its value as the single source of truth.
- **How to Manage Lead Statuses Effectively:**
  - As you call through a list, the density of people who will never answer the phone increases, causing your connect rate to drop over time.
  - By properly using statuses (e.g., "Connected"), you can segment your lists and balance your calling activity between fresh "Open" leads and older "Working" leads to keep metrics stable.
- **What is the Optimal Length of a Playbook?**
  - There is no magic number. It should be as long as it needs to be to give a rep all the information they need to do their job well, but without useless filler.
  - A poor onboarding process (and lack of a playbook) is a silent killer; you don't feel the pain on day one, but six months later when a confused and underperforming rep quits.

## 11 Years of Sales Knowledge In 25 Minutes

**Original Title:** "11 Years of Sales Knowledge In 25 Minutes" **Core Premise:** This document outlines 13 essential skills, grouped into key themes, that a salesperson must master to achieve high performance. The principles cover building trust, diagnosing problems, navigating conversations to prevent objections, structuring calls effectively, and justifying premium pricing.

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## Part 1: Building Trust

This is the foundation of any successful sales interaction.

### 1. Build Rapport (The Right Way)

- **Common Mistake:** Thinking rapport comes from small talk about the weather, sports, or personal lives. This often feels forced and inauthentic in a sales context.
- **Correct Approach:** Rapport is built on **competence**. It is the prospect's belief in your ability to deliver on a promise and solve a critical problem they have. Get to the point quickly and demonstrate your expertise.

### 2. Build Credibility

- Demonstrate that you intimately understand the prospect's world, their role, their industry, and their challenges.
- Use language that shows experience, such as: *"I've worked with customers in the same situation as you, and they were facing [similar challenge]..."* This builds confidence that you are a knowledgeable expert, not just a vendor.

### 3. Use Strong Tonality

- Speak with **confidence and authority**. Your tone should convey that you are comfortable and in control of the conversation's direction.
  - Avoid mumbling, sounding confused, or being weak. You are the guide; you must know the path to the next step, whether that's another meeting or a closed deal.
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## Part 2: Identifying the Prospect's Problem

You cannot sell a solution until you deeply understand the problem.

### 4. Know the Buyer Better Than They Know Themselves

- As a salesperson, you have a unique advantage: you speak to more people in your buyer's specific role than they do. This gives you a broader perspective on their common challenges and goals.
- You must become an expert on their role, what makes them successful, and what keeps them up at night.

### 5. Ask Questions Relentlessly

- The majority of your time on a sales call should be spent asking thoughtful, open-ended questions to gain a deeper understanding.
- **Examples:** *"What motivated you to have this conversation today?", "How have you tried to solve this problem in the past?", "Why is this a top priority for you right now?"*
- Asking questions allows the prospect to articulate their own problems and helps them shape their vision for a solution, which you can then align your offer with.

## 6. Clarify to Understand ("Be the Dumb Salesperson")

- While maintaining an authoritative tone, never be afraid to ask for clarification if you don't understand something.
- If a prospect uses jargon or makes a statement that is unclear, ask them to elaborate. *"Can you explain what you mean by that?" or "Help me understand why that's such a big problem."*
- Deep understanding is more important than pretending you know everything.

## 7. Never Push Your Own Agenda

- The conversation is about **them**, not you. The more you focus on their challenges, the more they trust you and the more information they share.
  - This creates a **positive feedback loop**: Your focus on them -> They trust you -> They give you more information -> You can ask better questions -> You can position your solution more effectively.
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## Part 3: Navigating the Conversation to Avoid Objections

The best salespeople don't handle objections; they prevent them from ever coming up.

## 8. Know Your Common Objections

- You must be intimately aware of the 3-5 most common objections you face.  
Examples:
  - Price / Budget
  - "We already have something in place." (Competition/Status Quo)
  - "I need to talk to someone else." (Other Decision-Makers)
  - "Implementation will take too long."
  - "I need to think about it."

## 9. Proactively Address Objections

- Bring up potential objections early in the conversation, before the prospect does. This builds trust and allows you to frame the issue on your terms.
  - **For Money:** Ask about the cost of the problem or what they're currently spending. *"Typically, solving this problem is worth around [\$\$\$] to our clients. What kind of budget have you allocated for this?"*
  - **For Competition:** Ask what would motivate them to leave their current solution. Challenge them on whether the pain is big enough to justify a change.
  - **For Decision-Makers:** Ask who else is typically involved. *"Generally, when I talk to people in your role, they also want [Job Title] to weigh in. Is there anyone else who would want to see this?"*
  - **For Implementation Time:** Ask about their ideal timeline early on. *"If you were to move forward, how quickly would you want a solution like this in place?"*

- **For "Think About It":** Ask about their decision-making process. *"What information do you typically need to make a decision like this?"*

## 10. Use Trial Closes Throughout

- After presenting a feature or benefit, check for understanding and buy-in with an open-ended trial close.
- **Bad Trial Close (Yes/No):** *"Does that look good to you?"*
- **Good Trial Close (Open-Ended):** *"Now that you've seen this, how is it different from how you do things today?"* or *"What impact do you think this would have on your team?"*
- This gets the prospect to explain the value in their own words.

## 11. Call Out Inconsistencies

- This is an advanced but critical skill. If a prospect says something that contradicts what they said earlier, you must politely call it out.
- **Example Script:** *"I'm happy to walk [Person's Name] through this. I am curious, though—earlier in our conversation, you mentioned no one else needed to be involved. Can you help me understand what's changed?"*
- This forces clarity and often uncovers hidden information about their decision process.

## Part 4: Executing the Sale

This section covers the structure of the call itself and the final, overarching principle.

**12. Properly Structure a Sales Call** A structured call prevents surprises and naturally leads the prospect to a decision.

- **A. The Upfront Contract (Agenda Setting)**
  - This demystifies the call and gets the prospect's buy-in on the process.
  - **Key Components:**
    1. **Purpose:** *"The purpose of this call is to..."*
    2. **Their Expectations:** *"To make sure this is valuable for you, what were you hoping to get from our call today?"*
    3. **Your Process:** *"I'll start by asking some questions to understand your use case, is that fair?"*
    4. **Agenda:** *"Then we'll cover 1, 2, and 3."*
    5. **Outcome:** *"Finally, at the end of this call, we will decide on a next step together, whether that's moving forward or deciding it's not a fit. Does that sound fair?"*
- **B. The Discovery (5-Part System)**
  - **Current State:** How are they doing things now? (*"Walk me through your current process for X."*)
  - **Problem:** Dive deep into the challenge. (*"How long has this been happening? Why do you think that problem exists?"*)

- **Impact:** Quantify the business and personal pain. (*"What impact is this having on you/the business?"*)
- **Ideal State:** Define their vision of success. (*"If we fixed this problem, what would success look like a year from now?"*)
- **Priority:** Understand the urgency. (*"Why is solving this a priority for you now?"*)
- **C. The Offer (Demo/Presentation)**
  - Break your solution down into 3-5 value segments.
  - Follow this loop for each segment: **Present the feature -> Explain its value -> Ask an open-ended trial close.**
- **D. The Close**
  - The close should feel like a natural next step, not a high-pressure event.
  - **Simple Closing Script:**
    1. **Summarize Value:** *"So, based on what we've discussed, our solution will help you achieve [value 1], [value 2], and [value 3]."* (Use the value points they gave you during trial closes).
    2. **Present Options:** *"From here, there are two ways to move forward: Option A or Option B."*
    3. **Ask for a Decision:** *"Which of these do you think makes the most sense for you?"*

### 13. Charge a Ton of Money (Sell High-Impact Solutions)

- Your earning potential is directly tied to the size and impact of the problem you solve.
- Selling a solution that saves a company \$100 million is far more valuable than one that saves them \$1000.
- To make the most money in your career, focus on selling high-value solutions that solve significant, high-priority business problems.

## 100% clarity on your target personas and target verticals

**Original Title:** "100% clarity on your target personas and target verticals" **Core Premise:**

The key to effective selling is not knowing magic words to close a deal, but knowing the right words to show a prospect that you are the right people with the right solution. This requires a deep understanding of their world, achieved by "speaking their language." The **Market Mapping** framework is the tool to gain this deep understanding.

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### Part 1: The "Market Mapping" Framework

This is a systematic exercise to gain clarity on your target market. It consists of two main parts: Vertical Analysis and Persona Analysis.

## A. Vertical Analysis (The "Where")

The goal is to understand the business context of the industries you serve. If you are just starting your go-to-market efforts, **focus on mastering one vertical first** before expanding.

For each target vertical, answer the following questions in detail:

- **1. Firmographics:**
  - **Employee Count:** What is the typical size of companies in this vertical?
  - **Revenue:** What is their typical annual revenue?
- **2. Unique Challenges:**
  - What are the top 3-5 challenges that are **unique or particularly acute for this vertical**? Go beyond generic problems and identify industry-specific pain points.
- **3. Solution Fit & Urgency:**
  - **Why is your solution a good fit for this vertical specifically?** Articulate your value through their industry lens.
  - **Why should a company in this vertical invest in your solution now?** What market trends or internal pressures create urgency for them today?
- **4. Feature-to-Problem Mapping:**
  - List your key product/service features.
  - For each feature, explain exactly **how it helps solve a vertical-specific challenge** identified above. This connects your product directly to their world.

**Key Insight:** This is a deep strategic exercise, not a quick task. True clarity requires significant time and critical thinking with your team.

## B. Persona Analysis (The "Who")

Within each vertical, you must understand the individuals involved in the buying decision. For each key persona (e.g., decision-maker, champion, stakeholder, end-user), answer the following:

- **1. Role-Specific Challenge:**
  - What is their **unique, personal experience** of the vertical's challenges?
  - How does the problem manifest in their day-to-day work?
- **2. The Status Quo:**
  - **How are they trying to solve this problem today?** This is a critical question. The answer is often "spreadsheets," "manual processes," or a patchwork of internal tools. This is your true competitor.
  - **How is your solution different and better** than both their current process and other market competitors?
- **3. Individual Goals & Drivers:**
  - What are their professional goals? (e.g., career advancement, looking good to their boss).
  - What KPIs are they held accountable for?

- How can your solution directly help them achieve their individual goals?
  - **4. Persona-Specific Messaging:**
    - **What is the best way to explain the value of your solution to *this specific persona*?** The value proposition must be framed in their language and context.
    - **Example:** A Chief Supply Chain Officer and a Director of Logistics experience the same supply chain disruption, but through different lenses. The CSCO feels it as a risk to revenue and margins; the Director feels it as a tactical failure of container visibility on the rails. Your messaging must reflect this difference in perspective.
    - **Real Buyer Quote:** Find and include a real quote from a customer in this role that explains their challenge in their own words.
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## Part 2: Key Takeaways & Q&A (The "How")

- **How to Choose a Vertical / Find Product-Market Fit:**
  - **Analyze Your Customer Base:** Look at your existing customers. Where do you win most often and have the happiest clients? Money is a great indicator of fit.
  - **Compare Deal Metrics:** If you have customers in multiple verticals, compare them. One vertical might have the same sales cycle length but a 4x higher average contract value (ACV). Focus there.
  - **Leverage Founder/Team Expertise:** If you have a deep background in a certain industry (e.g., "your mom was a dentist"), use that "insider" knowledge as a starting advantage.
- **How to Gather This Information:**
  - **Interview Your Existing Customers:** This is the best source. Ask them:
    - "What motivated you to buy from us?"
    - "What was the problem you had before?"
    - "What specific value are you getting from the solution now?"
  - **Survey the Market:** Use your sales team (SDRs) to conduct research-focused outreach. Instead of selling, have them call prospects in a target vertical to ask questions and gather intelligence about their challenges, processes, and priorities.
- **How to Handle Products that Fit Multiple Markets:**
  - This is the norm. The key is to understand that while the **fundamental problem** your product solves might be the same across industries, the **language, context, and use case are different**.
  - **Example:** A project management tool is functionally the same for architects and construction firms. However, an architect cares about managing client approvals and vendor bids, while a construction firm cares about managing subcontractors and material deliveries. Your marketing and sales messaging must be tailored to that specific context to resonate. You must "speak the language" of each vertical.

# Everything I know about designing a sales process

**Core Premise:** A structured sales process is the key to solving inconsistency, enabling data-driven optimization, and providing reps with a clear path to success. This framework breaks the process down into measurable stages, actions, and criteria to create a reliable and scalable sales engine.

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## Part 1: Problems Solved & Opportunities Created

### Problems Addressed by a Structured Process:

1. **Lack of Consistency:** Different reps use different methods, leading to unpredictable results and making it impossible to diagnose performance issues.
2. **Process Drift:** Without a defined structure, teams stop doing what works and drift towards unproven tactics, causing performance to plateau or decline.
3. **No Data for Optimization:** An unstructured process cannot be measured effectively, making it impossible to identify bottlenecks and make informed decisions to improve.

### Opportunities Created by a Structured Process:

1. **Link Actions to Results:** When you know that performing **Action X** leads to **Result Y**, you can build a predictable model for success and coach reps effectively.
  2. **Data-Driven Decisions:** Data tells you where to focus your coaching and process improvement efforts, removing guesswork.
  3. **Clarity for Reps:** Reps know exactly what they need to do on a daily basis to hit their number, which is one of the most critical and often missing elements in sales teams.
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## Part 2: The Three Core Principles of Sales Process Design

1. **Objective:** The process must be based on facts, not feelings. An action either happened or it didn't. This removes subjective interpretation from pipeline management.
  2. **Flexible:** The process must be able to adapt to the customer's buying journey. Buyers buy how they buy, and a rigid process will break.
  3. **Measurable:** Every step must be trackable. You must be able to measure the drop-off rate between stages to know where to focus your improvement efforts.
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## Part 3: The Sales Process Framework

This framework is composed of three core components:

## A. Deal Stages

- **Purpose:** To break the sales journey into distinct, measurable milestones (e.g., Discovery, Demonstration, Evaluating, Closing). This allows you to identify where deals are stalling.
- **Common Mistake:** Using ambiguous or overly simple stages like "Demo -> Closed Won/Lost." This hides the critical steps happening in between and provides no actionable data.
- **Best Practice:** Your stages should represent your *actual* sales motion. The goal of each stage is simply **to get to the next stage**.

## B. Meetings Within Stages

- **Purpose:** To define the specific actions (calls, demos, technical reviews, etc.) that occur within each deal stage.
- **Key Insight:** Mapping out meetings allows you to match your sales process to the buyer's needs and understand the capacity of your sales team. A rep with many deals in a meeting-heavy stage has less bandwidth.
- **Action:** For each stage, list all possible meetings and mark them as **mandatory** or **optional**.

## C. Exit Criteria

- **Purpose:** To create objective, non-negotiable rules that must be met before a deal can move from one stage to the next. This is the key to data integrity.
  - **Rules for Good Exit Criteria:**
    1. **They are Objective:** Based on facts, not opinion.
    2. **They are Required:** All mandatory criteria must be met.
    3. **They are Followed:** No stage skipping is allowed.
  - **Example:** Exit criteria for the "Discovery" stage could be: 1) Discovery call was **conducted**, and 2) The next meeting (demo) is **scheduled** on the calendar. The difference between "promised" and "scheduled" is critical for accurate forecasting.
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## Part 4: The Importance of a Structured Sales Pitch/Demo

Just as the overall process needs structure, so does the individual sales call or demo.

1. **Provides a Professional Experience:** A structured pitch feels professional and well-prepared, building confidence with the buyer. An unstructured call feels casual and inexperienced.
2. **Allows for Optimization & Practice:** You cannot improve what is not defined. A consistent structure allows you to test changes, measure results, and enable reps to practice a proven flow.
3. **Aligns the Entire Team:** A shared structure gets everyone on the same page, using the same language and process, which reinforces consistency and makes coaching easier.



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## Part 5: Q&A - Key Takeaways

- **On Qualification:** Any call that a sales rep spends time on should be tracked as part of the sales process. Qualification criteria should be objective. The first qualification threshold is at the very beginning of the process.
- **On Handling Customized Products:** The high-level **stages** of the process should remain consistent for everyone. The customization and complexity are handled by the different **meetings** within those stages, many of which may be marked as "optional."
- **On Splitting Discovery and Demo:** For more transactional sales (e.g., under \$5,000 ACV), combine them into a single, longer call. For more complex or higher-value sales, it's highly recommended to split them.
- **On Hiring SDRs:** The speaker prefers hiring fresh talent with **no prior SDR experience** (e.g., right out of college or from other customer-facing roles). This avoids the need to "un-train" bad habits from other organizations.
- **On Structuring the Sales Team (SDR:AE Ratios):**
  - **Mid-Market (3-6 month sales cycle):** Typically a **1:1** ratio.
  - **Enterprise:** Generally more AEs and fewer (or no) SDRs.
  - **Full-Cycle AEs (prospecting + closing):** Often leads to "spiky" performance (one month of high booking, one month of high closing) because they stop prospecting when their pipeline is full.
- **On Giving Pricing in Discovery:** If a prospect asks for pricing, give it to them. Don't hide it.
- **On Managing Remote SDRs:** The speaker prefers in-person teams, but provides a remote management framework:
  - **Daily:** Morning team sync.
  - **End of Day:** Reps manually fill out an activity tracker (makes the numbers "real" and fosters ownership).
  - **Weekly:** 1-2 team syncs and a mandatory 1-on-1 with each rep.
- **On "Land and Expand" Strategy:**
  - When a prospect has multiple problems your solution can solve, focus your initial sale on the **single most burning problem** that has the most momentum.
  - Once you "land" the deal by solving that urgent need, your customer success or account management team can "expand" into other modules or use cases. Use your own data to see if a land-and-expand approach is working well.
- **On Lead Generation Strategy:**
  - **"The lead list is the strategy."** For outbound, the quality of your list is the most important variable. Spend 5x more time and money on building a high-quality lead list than you think you need.
  - **Cold calling** remains the most reliable and effective outbound channel.