next8n

SOP: SALES REPRESENTATIVE

Workflow Automation Delivery Framework

ENTERPRISE EDITION

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Do’s and Don’ts

SOP: Sales Representative

Standard Operating Procedure for Discovery & Relationship Building

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Role Overview

Title: Sales Representative
Reports To: Sales Manager / Closer
Receives From: Lead Gen VA
Hands Off To: Closer

Primary Objective:
Build relationships with qualified leads, conduct discovery calls, and prepare prospects for proposals.

Daily Workflow

Morning Routine (30 min)

```
Check CRM for new qualified leads
Review today's scheduled calls
Prepare for each call (research)
Check emails for prospect responses
Update pipeline status
Prioritize follow-ups
```

Core Activities

```
1. LEAD RESPONSE (1-2 hours)
    Respond to new inquiries within 4 hours
    Schedule discovery calls
    Send calendar invites
    Confirm upcoming calls

2. DISCOVERY CALLS (2-3 hours)
    Conduct scheduled calls
    Take detailed notes
    Identify pain points
    Assess fit

3. FOLLOW-UP (1-2 hours)
    Send post-call summaries
    Nurture prospects not ready
    Re-engage cold leads
    Prepare handoff materials

4. ADMINISTRATION (30 min)
    Update CRM notes
    Log call outcomes
    Prepare for tomorrow
```

Lead Response Procedure

New Lead Response

```
RESPONSE TIME TARGETS:
- Hot leads (inbound): Within 1 hour
- Warm leads (qualified by VA): Within 4 hours
- Cold leads (nurture): Within 24 hours

_____________________________________________

INITIAL RESPONSE TEMPLATE:

Subject: RE: [Their Subject] / Great to hear from you!

Hi [First Name],

Thanks for reaching out! I saw your message about [their need].

We help [industry] companies automate [specific process],
and it sounds like there might be a good fit here.

I'd love to learn more about what you're looking to solve.
Do you have 20-30 minutes this week for a quick call?

Here's my calendar: [Link]
Or let me know times that work for you.

Looking forward to chatting!

[Your Name]
```

Scheduling Discovery Calls

```
SCHEDULING MESSAGE:

Hi [First Name],

Great to connect! Let's find a time to chat.

Here's my calendar with available slots:
[Calendly/Calendar Link]

The call will be about 30 minutes. We'll cover:
● Your current challenges
● What a solution might look like
● Whether we might be a good fit

Talk soon!

[Your Name]

_____________________________________________


CALENDAR INVITE:

Title: Discovery Call - [Your Company] x [Their Company]

Description:
Hi [First Name],

Looking forward to our call!

We'll discuss:
1. Your current workflow challenges
2. What you're hoping to achieve
3. Whether our solutions might help

Feel free to bring any team members who would benefit.

See you then!

Link: [Zoom/Meet link]
```

Discovery Call Procedure

Pre-Call Preparation (10 min)

```
RESEARCH CHECKLIST:

 Company website reviewed
 LinkedIn profile checked
 Recent news/press
 Tech stack (if visible)
 Previous conversation notes
 Prepared 3 personalized questions
 Zoom/Meet link tested
```

Discovery Call Framework (30 min)

```
CALL STRUCTURE:

0:00 - INTRO & RAPPORT (5 min)
─────────────────────────
"Hi [Name], good to meet you!"
[Small talk - 1-2 min]
"Before we dive in, what are you hoping to get out of today's call?"

0:05 - THEIR SITUATION (10 min)
─────────────────────────
"Tell me about [Company] and what you do..."
"Walk me through a typical day for your team..."
"What tools and systems are you using?"

0:15 - PAIN POINTS (10 min)
─────────────────────────
"What's the biggest time drain for your team right now?"
"What manual tasks frustrate you most?"
"What would change if this problem was solved?"
"Have you tried to solve this before? What happened?"

0:25 - NEXT STEPS (5 min)
─────────────────────────
"Based on what you've shared, I think we can help with [specific]."
"Here's what the next step typically looks like..."
"I'm going to connect you with [Closer] who will put together
 some options and walk you through what a solution might look like."

"Any questions before we wrap up?"
```

Key Discovery Questions

```
SITUATION QUESTIONS:
- "Tell me about your business and team structure"
- "What tools/systems do you rely on most?"
- "How does information flow in your organization?"

PAIN QUESTIONS:
- "What processes take the most time?"
- "Where do things break down or get stuck?"
- "What would you automate if you could?"

IMPACT QUESTIONS:
- "How much time is spent on [problem] each week?"
- "What's the cost of this problem to your business?"
- "What would solving this be worth to you?"

BUYING QUESTIONS:
- "Who else is involved in decisions like this?"
- "What's your timeline for solving this?"
- "Have you set aside budget for this?"
```

Post-Call Notes Template

```
CALL SUMMARY - [Company Name]

Date: [Date]
Attendees: [Names]
Duration: [X] minutes

COMPANY OVERVIEW:
[2-3 sentences about the company]

CURRENT SITUATION:
- Tools used: [List]
- Team size: [X]
- Current process: [Description]

PAIN POINTS IDENTIFIED:
1. [Pain point 1]
2. [Pain point 2]
3. [Pain point 3]

DESIRED OUTCOME:
[What success looks like for them]

BUDGET DISCUSSION:
[What was said about budget]

TIMELINE:
[Their urgency/timeline]

DECISION MAKERS:
[Who's involved]

FIT ASSESSMENT:
 Great fit   Good fit   Maybe   Not a fit

NEXT STEPS:
[What was agreed]

NOTES FOR CLOSER:
[Key things closer should know]
```

Prospect Qualification

Qualification Framework (BANT)

```
B - BUDGET
─────────
Do they have budget for this?
- "Have you allocated budget for this project?"
- "What range are you thinking?"
- "How do you typically fund projects like this?"

Score:  Strong   Possible   Weak

A - AUTHORITY
─────────────
Are they the decision maker?
- "Who else is involved in decisions like this?"
- "What's your role in the selection process?"
- "Do you need approval from anyone else?"

Score:  Strong   Possible   Weak

N - NEED
────────
Is there a real, urgent need?
- "What's driving this initiative?"
- "What happens if you don't solve this?"
- "How long has this been a problem?"

Score:  Strong   Possible   Weak

T - TIMELINE
────────────
When do they need this done?
- "When are you hoping to have this in place?"
- "What's driving that timeline?"
- "Is there a specific deadline?"

Score:  Strong   Possible   Weak
```

Qualification Outcomes

```
FULLY QUALIFIED (Hand to Closer):
[x] Budget confirmed or realistic
[x] Decision maker or access to them
[x] Clear, urgent need
[x] Defined timeline

PARTIALLY QUALIFIED (Nurture):
[x] Some criteria met
 Others need development
 Continue relationship, check in monthly

NOT QUALIFIED (Disqualify):
[ ] No budget
[ ] No authority
[ ] No real need
[ ] No timeline
 Thank them, add to newsletter
```

Handoff to Closer

When to Handoff

```
READY FOR CLOSER WHEN:
[x] Discovery call completed
[x] Pain points clearly identified
[x] Budget discussed (even if not specific)
[x] Decision process understood
[x] Timeline established
[x] Prospect expressed interest in next steps
[x] All CRM notes updated
```

Handoff Package

```
HANDOFF EMAIL TO CLOSER:

Subject: New Opportunity - [Company Name]

Hi [Closer],

Ready to handoff [Company Name] for proposal.

COMPANY: [Name]
CONTACT: [Name, Title, Email]
WEBSITE: [URL]

SITUATION:
[2-3 sentences]

PAIN POINTS:
1. [Main pain]
2. [Secondary pain]

WHAT THEY NEED:
[Specific solution description]

BUDGET SIGNALS:
[What they said/implied about budget]

TIMELINE:
[When they need it]

DECISION MAKERS:
[Who's involved]

COMPETITION:
[If they mentioned other options]

NOTES:
[Anything else important]

DISCOVERY CALL RECORDING:
[Link if recorded]

Next step is proposal call. They're expecting
to hear from you within [timeframe].

Let me know if you need anything!

[Your Name]
```

Introduce Closer to Prospect

```
WARM INTRO EMAIL:

Subject: Introducing [Closer Name] - Next Steps

Hi [Prospect Name],

Great talking with you about [their situation]!

I'm connecting you with [Closer Name], who leads our
solutions team. [He/She]'ll review what we discussed
and put together some options that fit your needs.

[Closer Name] - meet [Prospect Name], [Title] at [Company].
[One sentence summary of their need].

I'll let you two take it from here!

Best,
[Your Name]

_____________________________________________

CC: Closer
```

Follow-Up Cadence

Post-Discovery Follow-Up

```
IF NO RESPONSE AFTER INTRO:

Day 1: Intro email sent
Day 3: Bump email from Closer
Day 7: Call attempt from Closer
Day 14: Sales Rep checks in
Day 30: Move to nurture or close
```

Nurture Cadence

```
FOR PROSPECTS NOT READY:

Week 2: "Any thoughts on what we discussed?"
Month 1: Share relevant case study
Month 2: Industry insight or article
Month 3: "Circling back - is this still on your radar?"
Month 6: "Wanted to reconnect - how are things going?"

Content to share:
- Case studies
- Blog posts
- Industry news
- Webinar invites
- Helpful tips
```

CRM Management

Required Fields

```
AFTER EVERY INTERACTION:

 Last contact date updated
 Call notes added
 Pain points documented
 Budget info recorded
 Decision makers listed
 Timeline noted
 Next action set
 Stage updated
```

Pipeline Stages

```
STAGE DEFINITIONS:

NEW: Lead just received
CONTACTED: Initial outreach made
ENGAGED: They responded, scheduling call
DISCOVERY: Call scheduled or completed
QUALIFIED: Meets criteria, ready for Closer
PROPOSAL: With Closer for proposal
NEGOTIATION: Proposal sent, discussing
WON: Signed contract
LOST: Didn't close
NURTURE: Not ready, staying in touch
```

Metrics & Reporting

Weekly Metrics

```
| Metric | Target | Actual |
|--------|--------|--------|
| Discovery calls | 10 | |
| Qualified prospects | 4 | |
| Handoffs to Closer | 3 | |
| Response rate | 50% | |
| Show rate | 80% | |
```

Monthly Report

```
MONTHLY SUMMARY:

Calls Completed: X
Qualified: X (X%)
Handed to Closer: X
Pipeline Value: $X

Top Opportunities:
1. [Company] - $X potential
2. [Company] - $X potential

Lost Opportunities:
- [Company] - Reason: [why]

Observations:
- [What's working]
- [What needs improvement]
```

Do’s and Don’ts

```
DO:
 Respond quickly to new leads
 Prepare thoroughly for calls
 Listen more than talk
 Ask probing questions
 Take detailed notes
 Hand off qualified leads promptly
 Follow up consistently
 Stay organized in CRM

DON'T:
 Give pricing on discovery calls
 Make promises about timelines
 Oversell or exaggerate
 Skip CRM updates
 Hoard leads
 Rush discovery
 Argue with prospects
 Badmouth competitors
```

Next: See `03-sop-closer.md` for Closer procedures.

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