Module 3: The Sales Process Framework

Role-Specific Application Guide & Video Resources

Supplemental Training Material

📺 Video Resources for Module 3

Core Sales Process Training

“Steal My 7-Step Sales Process” by Patrick Bet-David
https://www.youtube.com/watch?v=ROEqCXj_Vv4
Duration: ~15 minutes
Learn the seven-step sales process that generated $30 million in revenue. Covers prospecting through closing with real-world examples.

“The BEST 7 Step Sales System” by Brian Tracy
https://www.youtube.com/watch?v=Pi5H3o1OOyY
Duration: ~12 minutes
Master sales trainer Brian Tracy breaks down his proven seven-step system for sales success.

“Sales Process Stages Easy Explained”
https://www.youtube.com/watch?v=mgywJxYDmGU
Duration: ~8 minutes
Visual explanation of the seven stages that help you identify potential clients, close deals, and ask for feedback.

Sales Pipeline Management

“Making Sales Frameworks Work For You”
https://www.youtube.com/watch?v=Fa4OSpCbq8s
Duration: ~20 minutes

How to sift through various sales methodologies and find the right framework for your specific situation.

"NEPQ - The Sales Framework That Works In Any Industry"
https://www.youtube.com/watch?v=o9knCDfS3UU
Duration: ~45 minutes
Advanced framework teaching tonality, eliminating sales pressure, and getting prospects to persuade themselves.

🎯 Role-Specific Applications

For Tamara (Head of Operations) - PRIMARY FOCUS

Your Role in Module 3:
Tamara, this module is **critical** for you. Your job is to take the sales process framework and turn it into a systematic, repeatable process that the entire team can follow.

Key Focus Areas:

1. Process Documentation
After completing this module, your task is to document each stage of the sales process in your CRM. Create clear definitions for when a lead moves from one stage to the next.

Stage Definition Exercise:

- Prospecting: What qualifies as a "prospect"?
- Initial Contact: What information must be gathered?
- Qualification: What are the BANT criteria for your loans?
- Needs Analysis: What questions must be asked?
- Presentation: What materials are required?
- Handling Objections: What are the top 5 objections?
- Closing: What paperwork/next steps?
- Account Management: What is the follow-up cadence?

2. CRM Workflow Creation
Build the following in your CRM:

- Pipeline stages matching the 7-stage framework
- Automated task creation for each stage
- Required fields that must be completed before advancing
- Stage conversion tracking and reporting
- Bottleneck identification dashboards

3. KPI Dashboard Setup
Create tracking for:

- Conversion rates between each stage
- Average time in each stage
- Stage-specific activities (calls, emails, meetings)
- Pipeline velocity
- Win/loss analysis by stage

4. Team Enablement Tools
Develop:

- Stage-specific checklists for Shawn and Ronald
- Email templates for each stage
- Call scripts aligned to each stage
- Objection handling guides
- Proposal templates

Tamara’s Implementation Checklist:

- [ ] Document all 7 stages with clear entry/exit criteria
- [ ] Build CRM pipeline with automated workflows
- [ ] Create KPI dashboard with stage conversion metrics
- [ ] Develop stage-specific templates and scripts
- [ ] Train team on new process and CRM workflows
- [ ] Schedule weekly pipeline review meetings
- [ ] Set up bottleneck alerts and notifications

Video Resources for Tamara:

- Sales Pipeline Management Best Practices: https://outreach.io/resources/blog/sales-pipeline-management-best-practices
- Salesforce Pipeline Management Guide: https://www.salesforce.com/sales/pipeline/management/

Tamara's Success Metric:
Within 2 weeks of completing this module, the entire team should be operating from a documented, CRM-based sales process with clear stage definitions and automated workflows.

For Shawn (Head of Lead Response) - SUPPORTING ROLE

Your Role in Module 3:
Shawn, you own the first 2-3 stages of the sales process: Prospecting, Initial Contact, and Qualification. Your focus is **speed and volume** through these early stages.

Key Focus Areas:

1. Prospecting Stage Mastery
Your job is to ensure no lead goes uncontacted. Understand:

- What qualifies as a "hot" vs "warm" vs "cold" lead
- Response time targets for each lead type
- Initial contact methods (call, text, email sequence)

2. Initial Contact Excellence
Master the first conversation:

- Your opening script must be memorized and natural
- Goal: Book the discovery call within 5 minutes
- Qualify basic criteria (property type, location, timeline)
- Set clear next steps

3. Quick Qualification
Use BANT framework rapidly:

- Budget: "What's your purchase price range?"
- Authority: "Are you the decision-maker?"

- Need: “What’s driving this purchase?”
- Timeline: “When are you looking to close?”

Shawn’s Stage Ownership:

- **Stage 1 - Prospecting:** Call every lead within 5 minutes
- **Stage 2 - Initial Contact:** Book discovery call or hand to Ronald
- **Stage 3 - Qualification:** Confirm BANT criteria, update CRM

Shawn’s Implementation Checklist:

- [ ] Memorize opening script for each lead source
- [ ] Practice BANT qualification questions
- [ ] Set up lead notification system (instant alerts)
- [ ] Create call disposition options in CRM
- [ ] Develop handoff process to Ronald for qualified leads
- [ ] Track daily metrics: calls made, contacts reached, appointments set

Shawn’s Success Metric:
100% of leads contacted within 5 minutes during business hours. 30%+ appointment booking rate from initial contact.

For Ronald (Head of Client Relationships) - SUPPORTING ROLE

Your Role in Module 3:
Ronald, you own stages 4-7: Needs Analysis, Presentation, Handling Objections, and Closing. You receive qualified leads from Shawn and take them through the relationship-building process.

Key Focus Areas:

1. Needs Analysis Deep Dive
When Shawn hands you a qualified lead:

- Conduct thorough discovery call (Module 5 techniques)
- Understand their investment strategy
- Identify pain points with current lender

- Uncover hidden needs

2. Solution Presentation
Match loan products to their specific needs:

- DSCR loans for investors
- Fix & Flip for short-term projects
- Portfolio loans for multiple properties
- Present options, not just one solution

3. Objection Handling
Common objections you'll face:

- "Your rates are higher than…"
- "I need to think about it"
- "I want to shop around"
- "Can you do better on the rate?"

4. Relationship-Based Closing
Your close is consultative, not pushy:

- "Based on what you've shared, which option feels right?"
- "What questions do you still have?"
- "What would you like me to prepare for you?"

Ronald's Stage Ownership:

- **Stage 4 - Needs Analysis:** Discovery call, understand full situation
- **Stage 5 - Presentation:** Present tailored loan solutions
- **Stage 6 - Objections:** Address concerns, build trust
- **Stage 7 - Closing:** Get commitment, start application

Ronald's Implementation Checklist:

- [ ] Review discovery call framework (Module 5)
- [ ] Create needs analysis template
- [ ] Develop solution presentation deck

- [ ] Build objection handling guide
- [ ] Practice consultative closing techniques
- [ ] Set up post-close follow-up sequence

Ronald’ s Success Metric:
50%+ conversion rate from qualified lead to submitted application. 80%+ of clients provide referrals within 90 days.

For CEO (Strategic Oversight) - LEADERSHIP ROLE

Your Role in Module 3:
As CEO, you need to understand the entire sales process to:

- Coach team members at each stage
- Identify bottlenecks and inefficiencies
- Step in for high-value deals
- Optimize the overall process

Key Focus Areas:

1. Process Optimization
Review the sales process quarterly:

- Where are deals getting stuck?
- Which stages have lowest conversion?
- What training gaps exist?
- How can we improve velocity?

2. High-Value Deal Involvement
For deals over $X threshold, you should:

- Join the presentation meeting
- Handle final negotiations
- Build relationship with key clients
- Close strategic partnerships

3. Team Coaching
Use the sales process framework to coach:

- Shawn: Speed up early stages, improve qualification
- Ronald: Deepen discovery, strengthen closing
- Tamara: Optimize workflows, improve metrics

4. Strategic Partnerships
Apply the sales process to partnership development:

- Prospecting: Identify potential referral partners
- Initial Contact: Reach out to real estate agents, attorneys
- Qualification: Determine fit and volume potential
- Needs Analysis: Understand their client base
- Presentation: Show how you can help their clients
- Objections: Address concerns about referral quality
- Closing: Establish formal partnership agreement

CEO Implementation Checklist:

- [ ] Review weekly pipeline metrics with Tamara
- [ ] Conduct monthly coaching sessions with each team member
- [ ] Identify and personally handle top 10% of deals
- [ ] Develop partnership pipeline using same framework
- [ ] Create escalation criteria for when you get involved
- [ ] Build strategic account management process

CEO Success Metric:
Team hits 90%+ of revenue targets. Pipeline velocity improves 20% quarter-over-quarter. Strategic partnerships generate 30%+ of new leads.

🎬 Role-Specific Video Recommendations

For Tamara (Operations Focus):

"How to Build a Sales Process in Your CRM"
Search YouTube for: "CRM pipeline setup tutorial" + your specific CRM platform

"Sales Metrics That Matter"
Search YouTube for: "sales KPI dashboard" and "pipeline velocity metrics"

For Shawn (Lead Response Focus):

"Speed to Lead Best Practices"
Search YouTube for: "speed to lead statistics" and "rapid response sales"

"Qualifying Leads Quickly"
Search YouTube for: "BANT qualification" and "lead scoring techniques"

For Ronald (Relationship Focus):

"Consultative Selling Process"
Search YouTube for: "consultative sales approach" and "relationship-based selling"

"Discovery Call Mastery"
Search YouTube for: "discovery call framework" and "needs analysis questions"

For CEO (Leadership Focus):

"Sales Process Optimization"
Search YouTube for: "sales process improvement" and "pipeline optimization"

"Coaching Sales Teams"
Search YouTube for: "sales coaching techniques" and "sales manager training"

📊 Stage-Specific Metrics by Role

Tamara Tracks (All Stages):

Stage	Key Metric	Target
Prospecting	Leads generated	100/week
Initial Contact	Contact rate	80%
Qualification	Qualification rate	40%
Needs Analysis	Discovery calls completed	30/week
Presentation	Proposals sent	20/week
Objections	Objection resolution rate	70%
Closing	Close rate	25%

Shawn Tracks (Stages 1-3):

Stage	Key Metric	Target
Prospecting	Response time	min
Initial Contact	Contact attempts	3-5 per lead
Qualification	Appointments set	30/week

Ronald Tracks (Stages 4-7):

Stage	Key Metric	Target
Needs Analysis	Discovery completion rate	90%
Presentation	Proposal acceptance rate	60%
Objections	Objection → Close rate	50%
Closing	Application submission rate	70%

💡 Implementation Timeline

Week 1 (Tamara):

- Day 1-2: Complete Module 3 training
- Day 3-4: Document sales process stages
- Day 5: Build CRM pipeline structure

Week 2 (Tamara):

- Day 1-2: Create automated workflows
- Day 3-4: Build KPI dashboard
- Day 5: Train team on new process

Ongoing (All Roles):

- Daily: Update CRM with stage movements
- Weekly: Review stage conversion metrics
- Monthly: Optimize process based on data

🎯 Key Takeaways by Role

Tamara: You turn the sales process into a system. Your success is measured by how well the team executes the documented process.

Shawn: You own speed through the early stages. Your success is measured by response time and appointment booking rate.

Ronald: You own relationship depth in the later stages. Your success is measured by conversion rate and referral generation.

CEO: You optimize the entire process and coach the team. Your success is measured by overall team performance and strategic growth.

📝 Next Steps

Tamara:

1. Schedule time to build CRM workflows this week
2. Meet with Shawn and Ronald to understand their needs
3. Create first draft of stage definitions
4. Present process to CEO for approval

Shawn:

1. Review your current lead response process
2. Identify gaps in your qualification approach
3. Practice BANT questions with team
4. Commit to minute response time

Ronald:

1. Map your current deals to the 7 stages
2. Identify which stage has lowest conversion
3. Develop improvement plan for weak stages
4. Schedule discovery call training with CEO

CEO:

1. Review this supplement with entire team
2. Approve Tamara’s process documentation
3. Set quarterly process optimization goals
4. Schedule monthly coaching sessions

This supplemental guide should be used alongside the Module 3 Training Guide and Worksheet. Each team member should focus on their specific role sections while understanding how their work fits into the overall sales process.