

Module 3: The Sales Process Framework

Action Worksheet

Name: _____ Date: _____

Part 1: Sales Process Audit

Evaluate your current approach to each stage of the sales process. Rate yourself on a scale of 1-5 (1 = Needs Improvement, 5 = Excellent) and identify specific areas for development.

Stage 1: Prospecting & Lead Generation

Current Rating: 1 2 3 4 5

What I'm doing well:

What needs improvement:

Specific action I'll take this week:

Stage 2: Initial Contact & Rapport Building

Current Rating: 1 2 3 4 5

What I'm doing well:

What needs improvement:

Specific action I'll take this week:

Stage 3: Discovery & Needs Analysis

Current Rating: 1 2 3 4 5

What I'm doing well:

What needs improvement:

Specific action I'll take this week:

Stage 4: Solution Presentation

Current Rating: 1 2 3 4 5

What I'm doing well:

What needs improvement:

Specific action I'll take this week:

Stage 5: Objection Handling

Current Rating: 1 2 3 4 5

What I'm doing well:

What needs improvement:

Specific action I'll take this week:

Stage 6: Closing

Current Rating: 1 2 3 4 5

What I'm doing well:

What needs improvement:

Specific action I'll take this week:

Stage 7: Post-Sale & Account Management

Current Rating: 1 2 3 4 5

What I'm doing well:

What needs improvement:

Specific action I'll take this week:

Part 2: Discovery Question Bank

Create your personal question bank for discovery conversations. Write at least 2 questions for each category.

Situation Questions (Establish Current State)

1.

-
-
- 2.
-
- 3.

Problem Questions (Uncover Pain Points)

-
-
- 1.
-
- 2.
-
- 3.

Implication Questions (Amplify Cost of Inaction)

-
-
- 1.
-
- 2.
-
- 3.

Need-Payoff Questions (Help Prospect Articulate Value)

-
-
- 1.
-
- 2.
-
- 3.
-

Part 3: Personal Sales Playbook - Discovery Stage

Document your approach to discovery conversations. This will become the foundation of your personal sales playbook.

Opening Statement

How do you typically open a discovery call?

Core Questions (Top 5-7 Questions You Always Ask)

-
- 1.

2. _____
3. _____
4. _____
5. _____
6. _____
7. _____

Information to Gather

What specific information do you need to collect during discovery?

- Current lending situation
- Pain points and challenges
- Decision-making process
- Budget/deal volume
- Timeline for decision
- Success criteria
- Competitors being considered
- Other: _____

Exit Criteria

What must be true before you move from discovery to presentation?

Common Objections in Discovery

What objections do you typically hear during discovery, and how do you respond?

Objection 1:

Your **Response:**

Objection 2:

Your

Response:

Part 4: Time Management Analysis

Track how you currently spend your time and identify opportunities for improvement.

Current Time Allocation

Estimate the percentage of your work time spent on each activity last week:

| Activity | % of Time | Hours |
|---------------------------------------|-------------|-------|
| Prospecting (calls, emails, outreach) | ____% | _____ |
| Discovery conversations | ____% | _____ |
| Presentations and proposals | ____% | _____ |
| Closing activities | ____% | _____ |
| Account management | ____% | _____ |
| Administrative tasks | ____% | _____ |
| Internal meetings | ____% | _____ |
| Other: _____ | ____% | _____ |
| TOTAL | 100% | _____ |

Ideal Time Allocation

Based on your goals and what drives results, how should you allocate your time?

| Activity | Target % | Target Hours |
|---------------------------------------|-------------|--------------|
| Prospecting (calls, emails, outreach) | ____% | _____ |
| Discovery conversations | ____% | _____ |
| Presentations and proposals | ____% | _____ |
| Closing activities | ____% | _____ |
| Account management | ____% | _____ |
| Administrative tasks | ____% | _____ |
| Internal meetings | ____% | _____ |
| Other: _____ | ____% | _____ |
| TOTAL | 100% | _____ |

Time Blocking Plan

Design your ideal daily schedule using time blocks:

| Time Block | Activity | Purpose |
|------------------|----------|---------|
| 8:00 - 10:00 AM | _____ | _____ |
| 10:00 - 12:00 PM | _____ | _____ |
| 12:00 - 1:00 PM | _____ | _____ |
| 1:00 - 3:00 PM | _____ | _____ |
| 3:00 - 5:00 PM | _____ | _____ |

Activities to Eliminate or Delegate

What low-value activities can you stop doing or delegate to others?

Eliminate:

1. _____

-
- 2.

- 3.

Delegate:

-
- 1.

- 2.

- 3.

Part 5: Qualification Framework

Create your personal qualification criteria to ensure you invest time in the right opportunities.

BANT Qualification Checklist

For each new opportunity, verify these four elements:

Budget:

- Prospect has confirmed budget/deal volume
- Budget aligns with our minimum requirements
- Funding is available or approval process is clear

Authority:

- I've identified the decision-maker
- I understand the decision-making process
- All stakeholders have been identified

Need:

- Clear pain point or opportunity exists
- Problem is urgent enough to drive action
- Our solution addresses their specific need

Timeline:

- Decision timeline is defined
- Timeline is realistic and achievable
- There's a compelling event driving urgency

Ideal Customer Profile

Describe your ideal prospect (the type of opportunity you want to pursue):

Industry/Type:

Deal **Size/Volume:**

Geographic **Location:**

Experience **Level:**

Key **Characteristics:**

Disqualification Criteria

What red flags indicate you should walk away from an opportunity?

1. _____
 2. _____
 3. _____
 4. _____
 5. _____
-

Part 6: Current Pipeline Analysis

Analyze your current opportunities using the 7-stage framework.

Pipeline Snapshot

List your top 5-7 active opportunities and identify their current stage:

| Prospect Name | Current Stage | Next Action | Timeline |
|---------------|---------------|-------------|----------|
| 1. _____ | _____ | _____ | _____ |
| 2. _____ | _____ | _____ | _____ |
| 3. _____ | _____ | _____ | _____ |
| 4. _____ | _____ | _____ | _____ |
| 5. _____ | _____ | _____ | _____ |
| 6. _____ | _____ | _____ | _____ |
| 7. _____ | _____ | _____ | _____ |

Stage Distribution

Count how many opportunities are in each stage:

| Stage | Count | % of Pipeline |
|-----------------------|-------|---------------|
| 1. Prospecting | _____ | _____% |
| 2. Initial Contact | _____ | _____% |
| 3. Discovery | _____ | _____% |
| 4. Presentation | _____ | _____% |
| 5. Objection Handling | _____ | _____% |
| 6. Closing | _____ | _____% |
| 7. Post-Sale | _____ | _____% |

Pipeline Health Assessment

Based on your stage distribution, answer these questions:

Do you have enough opportunities in early stages (prospecting/initial contact)?

Are opportunities moving through the pipeline or getting stuck?

Which stage has the most opportunities? Why?

What does this tell you about where to focus your efforts?

Part 7: Objection Handling Preparation

Prepare responses to common objections you encounter.

Common Objection #1

Objection:

Why they say this:

My response (using acknowledge-clarify-respond-confirm-advance):

Common Objection #2

Objection:

Why they say this:

My response:

Common Objection #3

Objection:

Why they say this:

My response:

Part 8: Weekly Action Commitments

Based on this module, commit to specific actions you'll take this week.

This Week I Will:

1. Process Improvement:

- Implement time blocking schedule
- Create discovery question bank
- Document playbook for one stage
- Update qualification criteria
- Other: _____

2. Pipeline Actions:

- Qualify all current opportunities using BANT
- Identify next action for each opportunity
- Disqualify poor-fit prospects
- Schedule discovery calls with new prospects
- Other: _____

3. Skill Development:

- Practice SPIN questions on 3+ discovery calls
- Use new objection responses
- Test new closing technique

- Request feedback from manager/peer
 Other: _____

Specific Measurable Goals:

Activity Goal: I will complete _____ prospecting calls this week.

Conversion Goal: I will schedule _____ discovery meetings this week.

Pipeline Goal: I will move _____ opportunities to the next stage this week.

Skill Goal: I will practice _____ this week.

Accountability:

Who will I share these commitments with?

When will I review my progress?

How will I celebrate success?

Notes & Insights

Use this space to capture key insights, questions, or ideas from the training session:

Complete this worksheet before your next training session. Bring it with you to discuss your progress and challenges.