SALES
PROCESS

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Getting the sales process right means getting your business right.

No more feast or famine, no more crappy clients, no more fretting about keeping the lights on. When you're done with this section, you'll have a sales process up and humming along.

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Why is this kick-ass?

- Not leaving $$$ on the table = Mo' Money!
- Start delegating parts of the process so you can close more
- Then be able to hire a rep
- Everybody on the team (even if it's just you) knows exactly where the deal is
- Know how much money you are going to bring in next month

Step 1
Know your vision for team

If you're going to create a process for selling, you need to know what you're selling first. Sounds obvious, but a lot of people overlook this. It goes beyond the physical service, and into the intangibles.

To get clear, create the following:

- List of services with benefits
- List of pain points
- List of pricing
- Definition of how are you different from the competition
- Customer success stories

Step 2
Understand goals and define your metrics

When you get an understanding of some fundamental sales metrics, you'll know exactly how much to invest in time & money to achieve your goals.

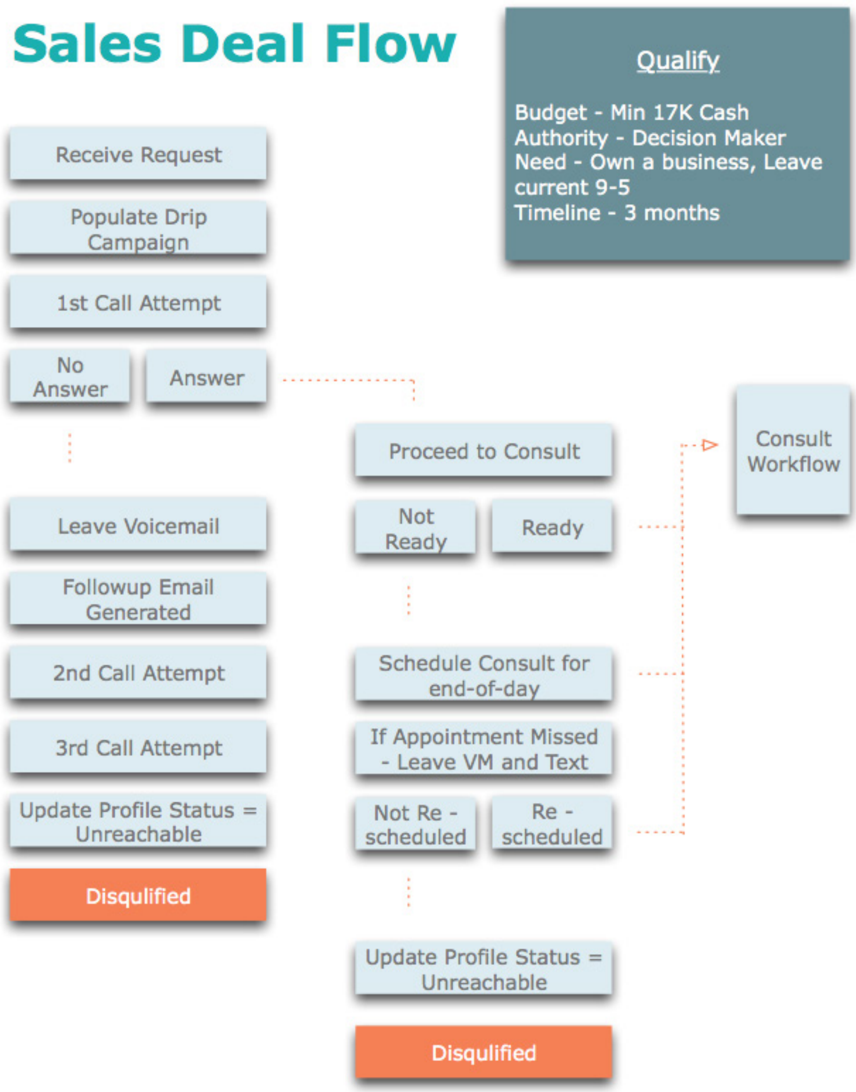
- **Average sales cycle — length of when the deal starts to when it closes**
- **Average deal size — the average amount an engagement is sold for**
- **Monthly revenue - amount of sales collected that month**
- **Cost of Client Acquisition — cost of all of your sales and marketing expenses over a given period of time, divided by the number of customers acquired in that window**
- **Closing Ratio — the percentage of closed deals to leads**

Step 3

Tracking the Sales Process

Use a Customer Relationship Manager (CRM) to track the entire process.

Here's a visualization of a typical sales workflow (for illustration):



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Step 4
Optimizing the Sales Process

Qualify Clients
Determine if they are a good fit for your services. It's the same as having a quick chat on tinder before meeting up on a date. Gotta filter out the weirdos.

When you qualify clients you reduce your marketing costs because you're not wasting time on leads that will never become clients, no matter how hard you work. And when your leads are qualified, you can create focused, tailored messaging to really close the deal.

To qualify clients, it's important to ask:

- Who are the decision makers?
- What is the budget they need to have to afford your service?
- What are their pain points?
- Why do they need you?
- How long does it take them to make a decision on purchasing from you?

Understand your engagement
So you know which clients are easier and better to work with.

For your clients:
What is their industry?
How long do you usually engage with them?
What is the average revenue per client?

List out the reasons for lost deals in the past
This will allow you to see the patterns of why you or team members are losing deals.

- Is there a new competitor?
- Is there a new technology you are not aware of?
- Are you priced too high? Too low?
- Is there an objection you keep failing to address?

Step 4
Optimizing the Sales Process (Cont.)

Gain knowledge of client's seasonality
Some months people buy others they don't. This will allow you to engage in the right parts of the year to focus and save time and money.

Create templates for proposals / deck presentations
The pitching process can be gruesomely time intensive if you let it be.

To help you improve it, imagine someone else creating a proposal for your business. They would need need:

- A list of pricing and services
- A proposal template
- A list of copy around each service that is being provided for the client

Step 5
Delegating Sales

Passing off sales to a team.

How do you find clients? Activity checklist:

- Referrals
- List of referral partners
- Conferences
- Networking Events
- Seminars
- Speaking Engagements
- Sponsored events
- Skillsshare classes
- Lunch & Learns
- Seminars
- Emails
- Cold Calling

What is your sales budget?

Process, Documents and Materials:

- **Sales Email Templates**
  - Commonly Used Email Templates
  - Cold outreach email
  - After a networking followup to schedule an initial meeting
  - A response to a referral
  - Email to schedule a consult or presentation
  - Email with proposal
- **Scripts / Conversation Frameworks**
  - Pitch to an individual
  - Pitch to a group i.e. referral group like BNI
  - Initial meeting
  - Consult / Presentation
- **Sales material (Decks, sheets etc)**
- **Sales FAQs: These are questions that can be asked dureing the sales process at any time to get to know if you are a right fit. Think of these as benign**
- **Sales objections: These are malignant – they can kill your deal.**
  Common Objections :
  - I think you are too expensive
  - My last service provider did a horrible job, how do I know you are not going to screw it up?
  - You are really small, how do I know you can handle the volume or deliver on time?
- **Proposal Template**
- **Sales Scorecard**
- **Sales Reports**
- **Workflows for each of your sales activities**

Process, Documents and Materials (Cont.):

An example in trello for Networking Events:

Networking Pre Event
Delete...

0%

- [ ] Put together weekly event list
- [ ] Approve events and budget
- [ ] If attendee list, check for influencers, strategic partners and leads
- [ ] If not attendee list identify speakers, panel speakers, hosts, sponsors
- [ ] Pick proper attire:

Add an item...

At Event
Delete...

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- [ ] Speak to 5 - 6 people identified in attendee list or invitation
- [ ] If an audience member - Ask question (framework to position company - establish credibility, insert lead qualifiers and ask a question that allows expert speaker to look good)

Add an item...

Post event
Delete...

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- [ ] Classify Cards - Influencer, Strategic Partner, Lead, Resource, Etc
- [ ] Digitize the cards
- [ ] Create .csv
- [ ] Upload .csv to your digital contact manager
- [ ] Followup - Templates for each category with Meeting type (f2f, coffee, lunch) [etc group put on your mailing list]
- [ ] If lead add to CRM (HubSpot)

Add an item...

Sales Score Card

Keep track of your sales team activity and results so you are not chasing after them.

Things to include in a scorecard:

Calls made
Scheduled meetings
Qualified clients
Proposals sent
Closed deals

Score cards should be reviewed a minimum of once a week with team members.

Tip: you can attach bonuses to scorecard achievements

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**We hope you enjoyed this free guide!
Here's the pitch to let us do this for you...**

Ready to make more money, work for better clients, free up your time, and finally enjoy running this businesses you've poured your life into?

ScaleTime is a consulting company that helps small agencies like yours run your business without you, like a well oiled machine.

We help you quickly scale your business in a controlled, seamless way—allowing you to do more of the work you love, and delegate the work you don't.

With ScaleTime, we dig into your business to identify bottlenecks and unleash them one-by-one, putting simple, effective, scalable systems in their place.

And our clients see some insane results.

Michael reduced client time by 80% to focus on lead generation.

Jean increased her recurring revenue by 7x.

And AJ worked with us to create a sales engine that increased his sales by 350%.

Click here *to get in touch or* **email us** *at juliana@scaletime.co*

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