Seven steps to successful selling

First, why do you need a sales process?

In a word, consistency.

A sales process provides repeatable, actionable, and trainable steps that help your business boost conversions, turn prospective leads into loyal customers, and enable everyone on your team to deliver positive experiences at every stage of the sales lifecycle. In addition, a streamlined sales process helps your company target promising leads faster and accelerate company growth. **Some studies have found that 35-50% of sales go to the vendor that responds first.**

Although this guide explains seven of the most fundamental and important steps in a typical sales process, you can (and should) customize these steps in ways that best fit your business model and culture. So whether you operate a small eCommerce site, offer professional services such as legal, IT, or business consulting, or run a larger B2B firm, you have to identify which steps can and should be adapted to best support your business model, target market, and sales team (even if the sales team is you).

Simplicity is the key to any successful sales process. This means that each step of the process should be easy to learn and remember so your team can spend more time selling and less time sitting in training meetings.

How do you measure the success of your sales process?

How do you know if your sales process is actually meeting your goals to convert more customers and increase revenue? There are a number of key performance indicators (KPIs) you can use to measure effectiveness. When combined with a customer relationship management (CRM) platform, your KPI data can help you visualize the entire sales funnel from end to end — and most importantly, help you meet your sales goals.

In fact, a [Nucleus Research report](#) found that 65% of companies using a mobile CRM met their sales quotas, compared to just 22% of reps without a mobile CRM.

Here are a few KPIs you may want to track, depending on your business model and sales goals:

→ New account wins or customer acquisitions

→ Upselling and cross-selling rates

→ Volume of total sales

→ Average amount of each sale

→ Average length of sales cycle

How do you measure the success of your sales process? (continued)

As important as sales goals and KPIs are, they mainly indicate whether or not your sales process is working. The process itself is what helps team members meet objectives such as quarterly revenue goals and new customer acquisition targets. If team members are left to devise their own script and sales techniques in each customer engagement, it can lead to confusion in your market as well as your company.

Let's take the example of an IT consulting firm. An existing customer refers another business to the consulting firm to help with a similar cloud migration project. However, the prospect ends up being directed to a different sales rep than the original customer. The new sales rep is not well versed in this type of project and doesn't know how to accurately assess the needs of the prospect. As a result, the prospect loses confidence in the consulting firm, and moves on to another service provider.

In addition to losing that potential customer, a poor experience may even motivate the prospect to leave negative reviews on social media and on review sites like Yelp and Google. The prospect will likely tell the referring friend about the bad experience, which may discourage that current customer from recommending the company to anyone else. As a result, **a single bad experience with a sales rep can unleash a snowball effect** that goes beyond losing a single customer to compromising the company's brand reputation.

A standardized sales process can help avoid scenarios like this. By providing clearly defined expectations, techniques, and sales strategies at each stage of the process, a sales process can help drive customer satisfaction, lead conversion, revenue growth, and overall brand reputation.

Key benefits of a sales process

Qualify leads faster: Usher qualified prospects through the sales funnel faster and filter out leads whose needs are incompatible with your offerings.

Get sales reps up to speed faster: A consistent and well-defined sales process can help new team members quickly understand expectations, adopt sales techniques, and start selling much faster.

Ensure your team can deliver a consistent experience: While your sales process should allow for flexibility, customer engagements shouldn't be crafted on the fly. Prospects and customers should have a seamlessly consistent experience with anyone on your sales team.

Boost customer retention: Superior customer experiences make happier customers. And satisfied customers stay engaged longer and are more likely to refer others.

Increase revenue: Of course, the ultimate goal is to increase revenue. A well-defined sales process can convert qualified leads faster, which in turn drives sustainable growth for your business.

What are the seven main steps of the sales process?

A sales process is a series of specific activities your salespeople must take to close a new customer. It includes different stages that typically align with your sales funnel. The sales process defines specific steps designed to convert leads into customers.

THE SEVEN-STEP
SALES PROCESS

01 Make contact & build rapport

02 Qualify compatibility

03 Analyze prospect's needs

04 Pitch your product

05 Deliver proposal

06 Negotiate

07 Close the sale

01

Make contact & build rapport

07

Close the sale

02

1 STEP

Initial contact

The first step of any sales process is prospecting or generating and qualifying leads — i.e., decision makers who may be likely to buy your products or services.

For [63% of marketers](#), lead generation is considered the most challenging part of the sales cycle. performance.

This is partly because, in many ways, this part of the sales process requires the most research, outreach and upfront legwork.

Whether you use inbound or outboard marketing approaches, you need to establish your target market, their wants, needs, and pain points, the kinds of messages that will attract them, and more. Once you've defined your prospective customer, you need to define how to reach them, whether it's by creating strategies such as a [content marketing framework](#) and [SEO marketing strategy](#) to drive traffic to your website, or outbound call scripts to directly contact pre-qualified leads.

In many organizations, the marketing team creates lead-generation campaigns to attract leads that can then be turned over to the sales team for follow up. However, in small businesses, marketing and sales associates may wear the same hats. This is a great example of a step that may be modified depending on the size of the business. For instance, an IT services company may maintain separate sales and marketing teams, while associates at a local catering company may play several roles, from generating leads at a food festival to answering phones, creating customer quotes, and working in the kitchen.

Qualify compatibility

Lead qualification is basically the process of determining whether or not a prospective customer is a good fit for your business. Lead qualification is important because it helps you to identify ideal customers and:

→ Focus valuable time and resources on key stakeholders who are more likely to buy.

→ Better understand the prospect's needs and wants, which in turn helps you deliver a more personalized experience and better solution for the customer.

→ Improve the customer experience and retain happier customers and increase referrals.

→ Avoid selling to customers who are a poor fit, and who may negatively review your company as a result.

To qualify leads, there are hundreds of questions you can ask to verify their compatibility. For instance, you can ask about the current problems they're trying to solve, whether or not they tried to solve them with another product or service, and understand their cost and timing expectations. Remember that you should only determine compatibility at this point. Proposals and prices come in the later stages of the sales process.

Analyze needs or wants

Analyze
prospect's
needs

03

3
STEP
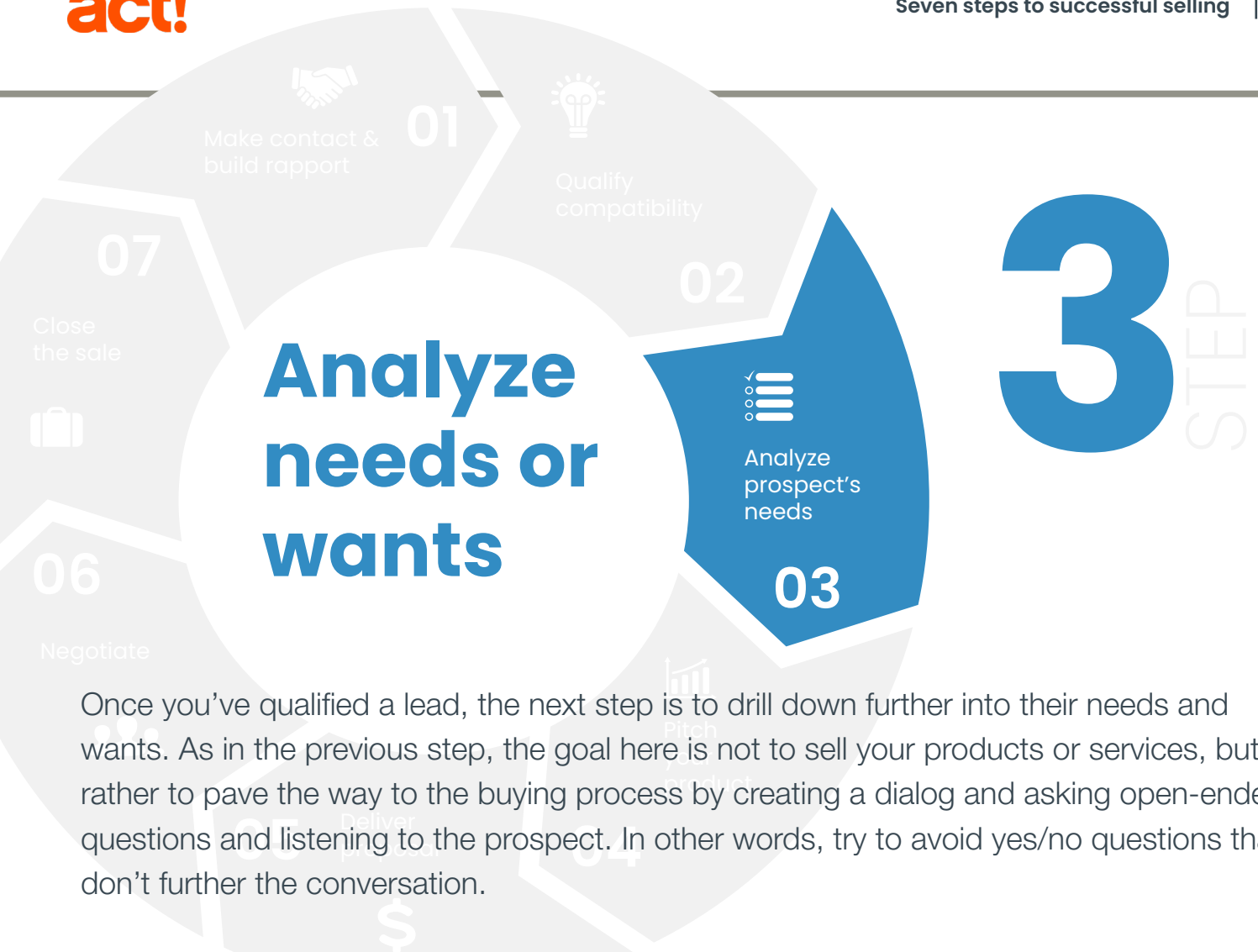
Once you've qualified a lead, the next step is to drill down further into their needs and wants. As in the previous step, the goal here is not to sell your products or services, but rather to pave the way to the buying process by creating a dialog and asking open-ended questions and listening to the prospect. In other words, try to avoid yes/no questions that don't further the conversation.

Here are some good examples of open-ended questions:

→ How would you describe the current problem(s) you're experiencing?

→ What are your biggest concerns about this problem?

→ What's keeping you from solving this problem today?

→ How much is this problem costing your business?

→ How are others, such as customers, employees, and suppliers, being directly or indirectly impacted by this problem?

These are just a few examples, and you should have at least some understanding about the prospect to help you prepare more focused questions about their business challenges. This way you will leave the meeting with key details to help you successfully navigate the next step: Making the Pitch.

Make the Pitch
1 of 2

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4
STEP

It's no surprise that [61% of sales reps think selling is harder](#) than it was just five years ago. This is partly because prospects can do much of their own Internet research, and it's easier to discover how competitive products, services, and prices compare to yours.

However, when crafting your sales pitch, there are some key ways to help you stand out from the crowd and connect with the prospect.

1 Personalization is everything. Don't start by talking about the features and benefits of your product or service. Reference past conversations, and especially mention the wants, needs, and pain points the prospect mentioned.

2 Use data, but don't stuff your pitch with statistics. Make it clear that you understand the prospect's market — and therefore their competition, challenges, and opportunities. If you have a relevant story to add from another customer win, bring that in to add interest to your pitch.

Make the Pitch
2 of 2

STEP 4

Pitch your product
04

3 Highlight benefits, not a laundry list of features. How will your offering make the prospect's job easier or their business run smoother? Connect the benefits you offer to what the customer specifically needs or wants.

4 Keep it short. While you want to be friendly and conversational, respect the customer's time. Start and end your pitch on time, and minimize "filler" or small talk.

Remember that, at this stage, you have already qualified the prospect and overcome objections earlier in the sales process. When making the pitch, you should already have a thorough understanding of the prospect's business and current challenges. By demonstrating that you've done your homework, they will be more willing to engage with you.

Deliver the proposal

5 STEP

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You may be thinking, "Isn't making the pitch and delivering the proposal the same thing?" Well, not exactly. How you deliver the proposal may depend heavily on the type of product or service you offer. In a highly commoditized industry, a simple pricing guide may be sufficient.

However, in more complex industries, such as professional services, delivering the proposal will likely require more interaction, including handling objections and discussion.

For instance, with eCommerce solutions, a rep may be able to simply email a proposal, but in a services organization that probably won't suffice. An IT consultant, for instance, will likely need a fuller understanding of the prospect's infrastructure, their current support needs, and future requirements for scalability and maintenance. In this scenario, an in-person dialog is more effective to ensure that everyone is on the same page regarding needs, requirements, and the proposed solution.

Negotiate

6 STEP

06

Negotiate

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Regardless of how you deliver the pitch, there's a chance that the prospect will have additional objections, questions, or price negotiations. Fortunately, by this stage you will have a good understanding of the customer's background you can use to expertly handle these objections.

Quite often, the prospect will want to negotiate the price. One way to avoid lowering your prices is to see if you can add something to the offer that's valuable to the client but relatively low cost to you. You can amend the proposal in a way that appears to deliver more for less — and potentially close the deal faster. For instance, you might offer longer payment terms, additional support services, more delivery options, or more flexibility in the contract. By offering these benefits, you may be able to avoid a price reduction while still offering more to the prospect.

07

Close
the sale

Close the deal

7 STEP

Closing the deal is about more than just getting the prospect to "sign on the dotted line." You want to ensure the prospect fully understands the terms of the offer, and of course answer any questions they may still have. Make sure all areas of concern are addressed before signing the contract and closing the deal.

In some ways, the closing phase of the selling process can be the most stressful. To make it easier, consider using CRM automation tools to help you better optimize the sales process from start to finish. CRM tools can collect and analyze data from all of your past and current sales efforts and provide the insight you need to understand what's working and how you can improve your sales playbook.

CRM automation is especially important if you're still manually tracking sales data on paper or with spreadsheets. It not only helps to eliminate time-consuming manual documentation and tracking, it can accelerate every step of the sales process so you can close deals faster. For instance, you can automate all communications, schedule reminders, update sales reports, and more. As a result, automation helps sales reps spend more time with prospects and less time on tedious data entry.

How CRM improves sales automation

When done well, CRM sales automation helps foster personalized relationships with prospects and customers but it's certainly not meant to replace human connections. **The benefit of any CRM is to automate tedious and time-consuming tasks** that can detract from personal, one-on-one interactions. In fact, personalization is so important that as much as 80% of consumers say they are more likely to make a purchase from a brand that provides personalized experiences.

However, if CRM and email marketing is instead used to blast generic emails and automated responses that remove personalized human interactions from the mix, the result can actually hurt customer relationships. **One study found that 70% of millennials are frustrated with brands that send them irrelevant email offers.** In addition, prospects and customers may feel that companies don't care about them if they can't easily connect to a real person.

To avoid this potential downfall, read this blog for email nurturing best practices to improve prospect relationships, increase their engagement with your brand and their likelihood to convert.

However, there are many great ways CRM automation can improve the sales process and free up more time for personalized prospect and customer interactions:

Create customized emails to target specific prospects and customers based on industry, demographics, history, and more.

→ Create customized emails to target specific prospects and customers based on industry, demographics, history, and more.

→ Schedule reminders to follow up with prospects.

→ Automate routine data entry, such as adding contact information to the database.

→ Prioritize leads to contact in order of best potential fit.

→ Simplify access to sales resources such as sales decks, proposals, and customer testimonials.

A CRM tool provides the ultimate support for your sales process because it provides a unified and coherent place where every member of the sales team can quickly access customer data as well as documentation about the sales process, policies, and ongoing activities. This also ensures continuity if an account rep leaves the company.

A CRM also helps to establish clear, concise, and repeatable steps across the entire sales process. Not only does this enable seamless team collaboration, it ensures that prospects and customers enjoy a seamless and consistent experience every time they interact with your company.

[Learn more about how this 7 steps sales process can help you close more deals.](#)

Next Steps: See how Act! CRM can boost automation and streamline your sales process

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If you're still looking for the right CRM tools to drive your sales cycle and manage your customer relationships, discover how Act! CRM can help you make data-driven decisions across every step of the sales process. Try it free for 14 days!

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