Sales Process Cheat Sheet

	Planning	Opportunity Qualification	Opportunity Strategy	Executive Sponsorship	Solution Development	Solution Confirmation	Close
		10%	25%	40%	60%	75%	100%
DESCRIPTION	The rep collaboratively develops the plan with manager to include analysis, strategies, and tactics to exceed the sales quota, whether a set of named accounts or a geographic territory. The sales plan is reviewed and updated quarterly with their manager	SDR hands-off a lead to rep through a phone call with the prospect; create Accepted Opportunity. The rep works with the coach and manager to identify opportunities for targeted accounts and with customer contacts to identify new needs and opportunities.	[internal Step] The rep works with the greater team (Coach, Manager, Team Lead, SE, etc.) to define a strategy and approach needed to accelerate the opportunity forward. A clearly defined strategy is created and populated in the CRM The Opportunity Plan Sheet is reviewed and updated weekly/ monthly with sales manager.	The rep works with the internal champion to identify the Economic Buying Influence (EBI), to whom the rep then conducts a needs audit and presents the solution. An EBI optimally: -owns the business problems, buying process, budget, and final approval. -Will influence other decision-makers with recommendations and proposals.	The team conduct a series of meetings to understand and qualify the prospect's business objectives, the solution requirements, and the decision-making process. A solution is developed along with a compelling business case for implementing the solution. Rep presents prospects with 'good, better, best' options, builds and sends proposal with prospect's top choice.	The recommended solution and proposal are validated and refined during a series of meetings at the technical level, the business level, and with the EBI. If required, demonstrations and customer reference contacts are conducted. Contract is sent, reviewed and mutually agreed upon.	The rep coordinates activity between his/her company, the prospect's legal, financial, and procurements departments to ensure progresses is achieved as agreed. Pricing and payment terms are confirmed, and the customer signs the final contract and issues purchase orders.
OUTCOMES	Detailed sales plan created by rep. Manager signs off on plan. CRM is updated.	Rep validates the prospect value and proposed solution. Business review and presentation delivered to and understood by prospect. Rep emails summary of phone call to prospect CRM is updated.	The team agrees to strategy and responsibilities for moving the opportunity forward. Manager agrees that this is in fact a validated strategy. The team represents: mgr., executives, legal, SE, implementation team, consulting, sales coach, sales ops (especially for enterprise deals) CRM is updated	EBI validates need for and understands the solution. A budget is approved A timeline to close is determined. Schedule a time for solution presentation Additional Business Reviews and Presentations (as needed) CRM is updated	Product trial begins (if needed) Decision-making process understood. Legal approach & terms. Prospect Legal/Financial processes understood ROI defined & verified CRM is updated	Trial of product is validated. Legal team reviews contract and makes adjustments if required. Schedule Kick-Off Call and implementation date. CRM is updated.	Prospect reviews and signs the contract. All success criteria are met. Sales rep schedules follow-up with client throughout first 90 days (all opt-out contracts need weekly attention). CRM is updated.
MILESTONES		Prospect's internal champion validates approach and agrees to next steps. Prospect & internal team set date for next meeting.		EBI organizes internal support, invites other DMs to individual business process reviews. All DMs agree to a time for a Solution Presentation.	ROI Confirmed EBI and DMs agree on proposal. EBI and DMs agree on a specific time for a Solution Confirmation	Trial success criteria are met. Proposal Q & A Prospect gives verbal agreement Agree to Kick-off Call Prospect identifies implementation success metrics/criteria	Both legal teams approve Contract signed PO issued
		PIPELINE		UPSIDE	EXPECTED	COMMITTED	WON/LOST

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