

Objective

Define a **sales process** to enable sales team to increase sales volume, average deal size and total revenue.

Sales Process

- Systemic approach
- Involves a series of steps to reach **desired results**

Desired Results

- **Predictable Outcomes**-*defined and predictable outcomes through a series of actions that will lead to increased sales volume, average deal size and total revenue.*
- **Repeatable Activities**-*activities that should be repeated to obtain the desired outcomes again and again by any salesperson within the organization*
- **Tangible Results**-*the outcomes that can be measured and compared*

Process

Create Awareness/Thought Leadership



Lead Generation/Qualification



Needs Analysis



Present Solution



Handle Objections



Summarize and Close

Create Awareness/Thought Leadership

Role: *Marketing*

Goal: *Fill the top of the funnel with prospects who are interested in SEL*

Actions:

- *Email campaigns*
- *Promo offers*
- *Webinar invites*
- *Trade Show presence*
- *Blog and Social Media strategy*
- *Web leads*
- *Joint Marketing Agreements*
- *Case Studies/Research*

Outcome: *Acquire customer's name, email address, and phone number*

Lead Generation/Qualification

Goal: *Develop qualified leads to pass on to Sales for Needs Analysis*

Actions:

Build credibility

- *Share the company background to create credibility*

Qualify

- *BANT (budget, authority, need and timing)*
- *Are they the decision maker/s*
- *Determine their decision making process*
- *Do they fit your customer profile?*
- *Are they working with other SEL Programs?*

Outcome: *Gain interest and set an appointment with Sales Representative*

Needs Analysis

Role: *Sales-Account Representative or Account Executive*

Goal: *Determine the scope of the opportunity and find their pain points*

Actions:

- **Background web research on contact and organization**
- **Consultative Probing**
- **Who** *is involved in the decision to buy... is going to sign the agreement... is going to be impacted by this decision and what is the impact?*
- **What** *are you currently doing to assess SEL... is working/not working... needs to change... is important to them?*
- **Why** *should they be assessing SEL... is this important in their setting... this will help them and their students?*
- **How** *would our solution work for them...how does it need to be changed to fit their needs... they expect us to deliver on our proposition?*
- **When** *they will make a buying decision...when they will start implementing the solution...they expect to see results?*
- **Restate the customers need**
- **Sum up and get confirmation-***“What you told me the key challenges are..”*

Needs Analysis

Outcome: *Information to create an individualized value proposition*

Salesforce Status: *Create Opportunity-Completed Sales Presentation. Also complete Buyer Persona Template and attach to Salesforce*

Buyer Persona Template

- **Contact Name:** *Kim Shaffer*
- **Contact Role:** *SEL Coordinator*
- **Contact Name:** *Eric Dowd*
- **Contact Role:** *SEL Specialist*

Organizational Name: *Walker County School District*

Organizational Profile: *The Walker County School District (WCSD) is focused on creating an education system where all students achieve academic success.*

Needs: *Currently using an SEL curriculum and need an assessment*

Present Solution

Role: *Sales-Account Representative or Account Executive*

Goal: *Create an individualized solution for each prospect*

Actions:

- *Present an individualized value proposition for each customer*
- *Share features and benefits of our solution*
- *Demo solution when appropriate*
- *Continue to ask discovery and clarifying questions throughout*

Outcome: *Gain agreement to move forward with a quote for services*

Salesforce Status: *Change Opportunity-Trial or Quoted*

Handle Objections

Role: *Sales-Account Representative or Account Executive*

Goal: *Handle all questions or concerns from the customer*

Actions:

- *A= Acknowledge the objection*
- *C= Clarify to make sure you understand the objection*
- *H= Handle the objection with sales skills/tools (research, testimonies, re-demo of the product, support in finding funding, etc...)*
- *E= Evaluate to make sure you have overcome the objection*

Outcome: *Process has moved forward and prospect is ready to make a final decision*

Salesforce Status: *Leave Opportunity-Trial or Quoted (this is part of the Present Solution step)*

Summarize and Close

Role: *Sales-Account Representative or Account Executive*

Goal: *Force a decision to move forward or end the process*

Actions:

Ask for the business

- *Your biggest pain spots are?*
- *Do you think this will meet your needs?*
- *What other stakeholders would benefit?*
- *Get clarity on number of students, teachers and classrooms*
- *Cover pricing & get clarity on funding sources*
- *Present to anyone else?*
- *When would you like to begin?*

Outcome: *Achieve the sale or realize it is not a good fit at this time*

Salesforce Status: *Change Opportunity-Verbal Commitment or Lost (if Verbal Commitment, move to Client Service for billing/payment and complete intake form for Implementation Team)*