

Sales Process Guide

Part of: Habit 2: Sales Process

Why you need it: Designing and embedding the right sales process will make it easier for you to sell and for customers to buy

Process

01

Project time

1 week+

Level

Involved

Audience


Sales
Leader

Benefit

Practical
Tool

About this guide

- The tool is a simple guide to help you design Sales Process
- When designing Sales Process, there are some building blocks every business should consider:
 - Channel: how would your customers like to buy from you?
 - Lead generation & prospecting
 - Sales engagement
 - Price
 - Fulfilment
 - Account management & nurturing

Tips for success

- Think about Sales Process from the perspective of the customer buying journey
- Clear handoff between steps – no customer falls into a gap
- Standardised touch points but with flexibility for entrepreneurial actions from the sales team
- Capture data at every step

Sales Channel Output

Guidance on designing a Sales Process that will make it easier customers to buy and for us to sell.

Useful links

- [Sales process overview](#)
- [Process Overview](#)
- [Sales Excellence](#)
- [Sales Excellence toolkit](#)

How to Design Sales Process (Step-by-Step)

Lead Generation & Prospecting	Sales Engagement	Price	Fulfillment	Account Management & Nurturing
<p>Begin with target market segments and ideal customer profiles.</p> <p>Use a mix of inbound and outbound methods.</p> <p>Prospecting must be disciplined and consistent – it’s about quality leads.</p> <p>Make sure leads are qualified based on fit and potential.</p>	<p>Value proposition tailored to the customer.</p> <p>Structure key touchpoints (calls, meetings, demos, technical advice).</p> <p>Design in ‘magic touches’- personalised, repeatable actions that make the customer feel understood.</p> <p>Add value early.</p>	<p>Anchor price discussions in the value you provide, not just the product cost.</p> <p>Equip the sales team with pricing guidelines and authority limits.</p> <p>Be bold.</p> <p>Make price an active part of the sales process.</p>	<p>Quick, accurate, consistent delivery.</p> <p>Smooth fulfilment reinforces trust and makes repeat business more likely.</p> <p>Set clear expectations with customer.</p> <p>Clear handoff from department to department, including from sales to operations.</p> <p>Communicate with customer throughout.</p>	<p>Turn first sales into long-term relationships.</p> <p>Regular, structured follow-up with customers- checking satisfaction, spotting new sales opportunities (upsell), solving problems early.</p>
Steady pipeline of qualified prospects	Turn prospects into opportunities	Part of sales process	Deliver on what was promised	Ongoing sales process and loyalty

Example Sales Process on a Page

