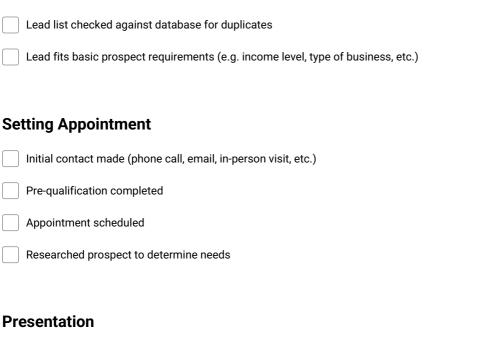
Sample Sales Process Checklists

The pre-flight checklist helps to ensure that no critical step is overlooked or forgotten even if the pilot is in a hurry or preoccupied with other issues. In the same way, a sales process checklist can help you to track each stage of the sales cycle and is the first step to creating a sales process plan.

Basic Sales Process

Prospecting for Leads



Final qualification completed – prospect is a true opportunity

Prospect needs assessed

Decision maker identified

Purchasing process and requirements identified

Next steps determined (scheduled a second meeting, collected RFP requirements, etc.)

Closing

Prospect objections and questions addressed
 Appropriate product/service type selected and accepted
 Customer signed contract
 Asked customer for permission to use as a reference or testimonial
 Asked customer for referrals

Post-Closing

- Reported sale to sales manager
- Order processed and filled
- Sent thank-you note to customer
- Followed up to confirm customer satisfaction
- Resolved any questions or problems

Complex Sales Process

Prospecting for Leads

Lead list checked against database for duplicates

Lead fits basic prospect requirements (e.g. income level, type of business, etc.)

Setting Appointment

Initial contact made (phone call, email, in-person visit, etc.)

Pre-qualification completed

Appointment scheduled

Researched prospect to determine needs

Sent meeting agenda and requirements to prospect

Initial Presentation

Final qualification completed – prospect is a true opportunity
Prospect needs assessed
Decision maker identified
Purchasing process and requirements identified
Next steps determined (scheduled a second meeting, collected RFP requirements, etc.)
Information Collecting
Information Collecting Prospect priorities, issues, and requirements documented
Prospect priorities, issues, and requirements documented

- Purchasing process documented and approved
- Sales team and other collaborators briefed
- Project funding applied for and approved

Development

- Prospect contacts and/or visits industry references
- Proposal submitted to prospect and any requested revisions completed
- Contracts submitted to prospect's legal team for approval
- Closing date determined

Closing

- Prospect objections and questions addressed
- Appropriate product/service type selected and accepted
- Customer signed contract
- Asked customer for permission to use as a reference or testimonial
- Asked customer for referrals

Post-Closing

- Reported sale to sales manager
- Order processed and filled

Sent thank-you note to customer

Followed up to confirm customer satisfaction

Resolved any questions or problems

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