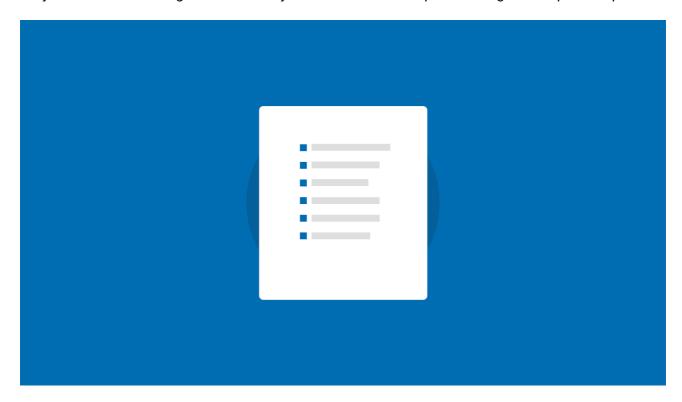
Sample Sales Process Checklists

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
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
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.)
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 Post-
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
Prospect priorities, issues, and requirements documented
Competitor comparative strengths and weaknesses assessed
Prospect internal advocate(s) identified
Prospect internal opponent(s) identified
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
Prospect objections and questions addressed Appropriate product/service type selected and accepted
Appropriate product/service type selected and accepted
Appropriate product/service type selected and accepted Customer signed contract
Appropriate product/service type selected and accepted Customer signed contract Asked customer for permission to use as a reference or testimonial
Appropriate product/service type selected and accepted Customer signed contract Asked customer for permission to use as a reference or testimonial
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
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

Followed up to confirm customer satisfaction	
Resolved any questions or problems	Make and Share Free Checklists
	checkli.com