

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

- 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
- 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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