

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

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- ☐ 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

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- ☐ Appropriate product/service type selected and accepted
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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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