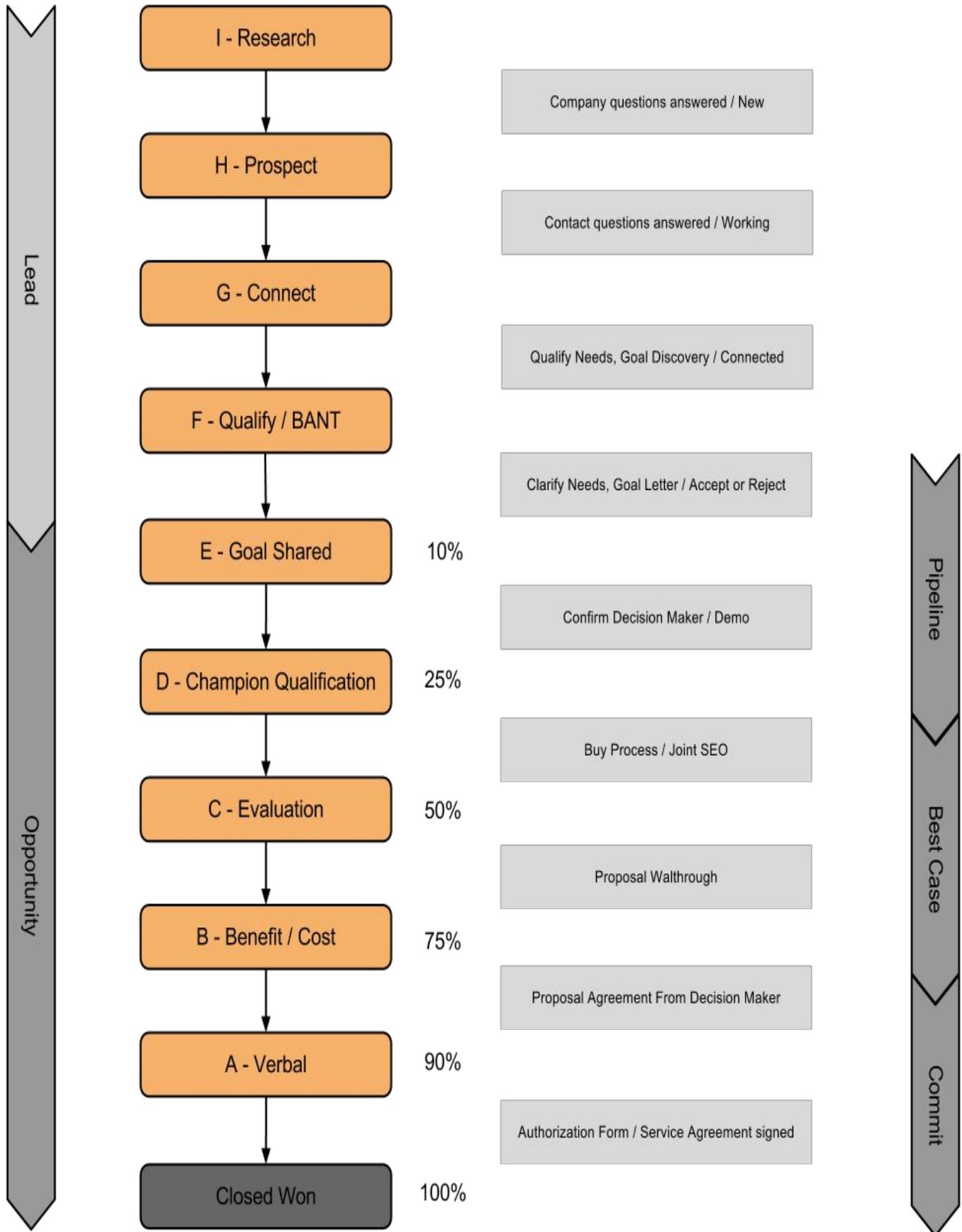


# Enterprise Sales Process Example



Acct Name:

## I - Research

### **Client Deliverable:**

No deliverable required

### **Rep Deliverable:**

- Company questions answered

### **SalesForce:**

No action required

### **Actions / Tools:**

- Check website
- Do Online research
- RJ Lookup
- Use Admin Tool
- Twitter
- Facebook
- Linkedin
- Buying triggers by vertical

### **Company Questions:**

- How does the company make money?
- What is their mission statement (why do they exist)?
- How long have they been in business?
- Who are their customers?
- How many employees? How many branches do they have?
- What is the approximate annual revenue?
- What challenges is the company facing?
- What "key" initiatives are Sr. Management focused on?

### **Client Deliverable:**

No deliverable required

### **Rep Deliverable:**

- Company questions answered

### **SalesForce:**

No action required

## H - Prospect

### **Actions / Tools:**

- Check website
- Linkedin / Twitter
- Twitter / RJ Look up
- Admin Tool

### **Prospect Questions:**

- What is the prospect's role?
- Who do they report to?
- How long have they been there?
- Where were they before?
- Does the prospect have X?
- Does the prospect appear to be a decision maker?
- What online activities has the prospect been involved in lately?
- Who does the prospect know that I may know? (LinkedIn)
- What are the prospects professional interests? (who they follow)

## G - Connect

### **Client Deliverable:**

No deliverable required

### **Rep Deliverable:**

- Reach outs with the prospect (min 5 attempts – social, email, phone, etc. Inbound or Outbound)

### **SalesForce:**

- Outbound/Inbound lead change lead status to "Working"

### **Actions / Tools:**

- Check website
- Linkedin / Twitter
- Twitter / RJ Look up
- Admin Tool

## F - Need Qualification / Goal Discovery

### **Client Deliverable:**

- Prospect agreed to qualify needs / goal discovery discussion

### **Rep Deliverable:**

- Scheduled qualify needs / goal discovery discussion

### **SalesForce:**

- Change lead status to "Connected"

### **Qualify Needs Knowledge:**

- Intro Confirm stages "I" and "H" (research on company & prospect)

### **Company Questions:**

- What is your familiarity with X?
- If you have not used X before, do you know much about what we do?
- How have you used X in the past?
- How would you assess your X skill level (novice, intermediate, advanced)?
- How are you using social media in your organization?

### **Social Media Landscape Questions:**

- How many people in your organization use social media?
- How many social networks do you manage/have?
- How many profiles does your organization have in total?
- Do you have plans to be active on other networks this year?

### **Social Media Goals Questions:**

- What are the top things you want to do with a social media tool? (Benefits/Priorities)
- What are your goals in the next year and how do you see your social media initiatives contributing to these? (Understanding the bigger picture)
- What are some of your short term objectives (next 3, 6 months) within social media? (More of the short, mid term)

### **Budget Questions:**

- Has there been a budget set for this project?
- What budget has been set for the project?

Authority Questions:

- Are there other people responsible for social media that reside outside your department/s?
- Is there anyone else beside yourself is involved in making recommendations/decisions on social media solutions in your organization?

Need Questions:

- (Inbound) Tell me from your perspective what made you reach out in the first place?
- Would there be an overarching strategy within the company regarding other departments? (Marketing, sales, customer service, support, human resources/recruitment, legal, research and development, executives, product, etc.)
- Compelling event? Timeline Questions:
  - When do you need this to be functional by?
  - When would you like to see a solution in place?
  - What is your anticipated timeline to achieve these goals?

**Post Conversation**

**Rep Deliverable:**

- B.A.N.T Strategy
- Move lead out
- Send Goal letter

**SalesForce:**

- Change lead status to "Accepted Converted" to move forward
- If client does not qualify then move lead stage to "VIP Nurture, Rejected"

**Actions / Tools:**

- B.A.N.T. understanding: B=Budget, A=Authority, N=Need, T=Timeline

**Goal Letter Topics:**

Social Media Landscape: Social  
Media Goals: Current Situation:  
Desired Situation:

## E - Goal Shared

### **Client Deliverable:**

- Client responded and agreed to the goal letter (verbal accepted, ideally email)
- Discussion or (email exchange) around a business objective shared by the prospect (BANT applies)

### **Rep Deliverable:**

- Confirm decision maker via email, phone, etc...

### **SalesForce:**

- Convert lead to an opportunity and stage "E Goal Stage"

## D - Champion Qualification

### **Client Deliverable (one of the following):**

- Client confirms they are the decision maker or informs you who is?
- Client confirms they can and have the budget
- Client puts you in touch with the decision maker

### **Rep Deliverable:**

- Confirms contact with decision maker
- Shared goal with decision maker
- Identified contact as a key player
- Confirmed priorities are in line
- Needs and initial requirements are focus of discussions

### **SalesForce:**

- Change status to "D Champion Qualification"

### **Decision Maker Questions:**

- What is your role? Who do you report to?
- How long have you been there?

- Who, besides yourself will be involved in the decision to select the solution?
- Where were you before?
- How many social networks are you directly

### **Department Questions:**

- What are the primary goals of your department this year?
- In your role, do you regularly work with other departments?
- What other departments are you involved in?
- How is your department structured?

### **Engagement Questions:**

- Publish or schedule message across multiple networks? Amount and Frequency? Purpose?, Monitor brands and/or mentions?, Filter tweets by keyword or influence?, Need to geo-target messages?, Need to post files or photos?
- Tell me about your internal workflows – who has access?
- How many people would you say are involved in total?

Do you currently engage with followers/fans on social media? Who is doing the engagement? How are you collaborating internally?

### **Team Collaboration Questions:**

- Team permission levels?, Team performance analytics?, Assigning messages? Engagement?, Share search streams across team members?
- Do you use any analytics?

### **Analytics & Reporting Questions:**

- Sharing analytics & reports?, Build custom reports? 50 Different modules?, Team analytics?, Facebook insights?, Google analytics?, Omniture/site catalyst analytics?, Flexibility and accessibility?, Track responses and engagement?, Ow.ly and vanity URL tracking?
- Do you have security concerns?

### **Security Questions:**

- Limited permissions?, HTTPS secure login? Secure Profiles? Vanity URL?
- Professional Services?
- How to maximize adoption?

### **Evaluation Questions:**

- How are things done today?
- Why not satisfactory? (Why do the project?)
- What is the vision (what would you like to be able to do)?
- If you could do this, how would things be better?
- What options are you considering?

### **Post Conversation:**

#### **Client Deliverable:**

- Decision maker shared and agreed to goal / priorities are in line
- Agrees to demo

#### **Rep Deliverable:**

- Schedule Demo
- At least one full solution development conversation has been documented
- Gains access / interviews with other key players if necessary

## C - Evaluation

### **Client Deliverable:**

- Decision maker agrees to explore purchase options
- Proposed solution agreed

### **Rep Deliverable:**

- Requirements are expanded
- Clarification of previous conversations and missing information uncovered
- Seller may have several solution development conversations as the real decision maker is still an unknown
- Timeline is known

### **SalesForce:**

- Change stage to "C Evaluation"

### **Buying Process Questions:**

- What are the decision criteria? (Features? Cost? Vendor? ROI? meet requirements, etc.)
- Have you ranked / prioritized these criteria? (What are the top 3?)
- How do you determine which option is the best fit?
- Once you have identified the solution, what happens next?
- Will a business justification or business case be prepared? (Can we help you?)
- Does the recommended solution have to be approved by Senior Management?
  - How does that happen (formal meeting? Steering Committee?)
  - Who on Senior Management will participate? (confirm Exec Sponsor)
  - What is important for them in order to approve (business case? ROI? Demo?)
- What role will IT play in this process?
- Is this project likely to go to RFP? What would that process look like?

### **Purchasing Process Questions:**

- Once Senior Management has confirmed the selection, then what happens?
- Will your company generate a PO?
  - What is the process to generate a PO? (Is there a requisition process? Who authorizes? Etc.. Do you need to set up a new vendor?)
- Will your legal group look at the license agreement? How long might this take?
- Are there any other final approvals or steps required before documents are signed?
- Who will sign the documents? (order form, SOW, PO if needed)
- Assuming everything goes according to plan, what is a realistic target date to have the paperwork finalized?

### **Post Conversation**

#### **Client Deliverable:**

- Decision maker agrees to explore purchase options

#### **Rep Deliverable:**

- Business requirements and measurement conversations are documented
- Products and services become focus of conversations and proof delivery
- Preliminary success metrics established
- Draft proposed "Sequence of Events"
- May have several solution development conversations as part of executing the "Sequence of Events"

## B - Benefit/Cost

### **Client Deliverable:**

- Proposed "Sequence of Events" accepted
- Key Players agree to solution development
- Agreement to continue along Sequence of Events
- Benefit / cost analysis

### **SalesForce:**

- Change stage to "B Benefit/ Cost"

### **Actions / Tools:**

- Proposal builder

### **Rep Deliverable:**

- Send proposal
- Review `draft' proposal with decision maker or buying committee
- Create quote in system/forecast accuracy (\$ and date)
- Agreed benefit cost
- Legal process identified

## A - Verbal

### **Client Deliverable:**

- All legal / contractual procedures in progress
- References checked
- Completed and signed off S.o. E

### **SalesForce:**

- Change stage to "A Verbal"

### **Rep Deliverable:**

- Company strengths and expertise becomes the focus in reducing RISK
- Deal with any outstanding objections
- Involve legal if required
- Prepare for negotiations (get/give)
- Ask for the business

### **Actions / Tools:**

- Proposal builder

## Closed Won

### **Client Deliverable:**

- Auth Form / Service Agreement Signed
- Legal Approval complete

### **Rep Deliverable:**

- Process order
- Receive either credit card, PO or signed contract

### **SalesForce:**

- Change stage to "Closed Won"
- Enter notes about the win

## Closed Lost

### **SalesForce:**

- Change stage to "Closed Lost"
- Enter notes about the loss:
  - Which competitor? Why?
  - Functionality? Why?
  - Price? Why?