FAST TRACK YOUR SALES

MODERN SALES PROCESS EXAMPLE

RGC Sales Inc.
Sell More. Faster.

Enterprise Sales Process Example

Stage	Detail	%
I - Research	Company questions answered / New	
H - Prospect	Contact questions answered / Working	
G - Connect	Qualify Needs, Goal Discovery / Connected	
F - Qualify / BANT	Clarify Needs, Goal Letter / Accept or Reject	
E - Goal Shared		10%
D - Champion Qualification	Confirm Decision Maker / Demo	25%
C - Evaluation	Buy Process / Joint SEO	50%
B - Benefit / Cost	Proposal Walthrough	75%
A - Verbal	Proposal Agreement From Decision Maker	90%
Closed Won	Authorization Form / Service Agreement signed	100%

Left side groupings: Lead, Opportunity

Right side groupings: Pipeline, Best Case, Commit

Acct Name:

I - Research

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Client Deliverable:
No deliverable required

Rep Deliverable:
❑ Company questions answered

Sales CRM:
No action required

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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?

H – Prospect

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Client Deliverable:
No deliverable required

Rep Deliverable:
❑ Company questions answered

Sales CRM:
No action required

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</table>

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

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Client Deliverable:

No deliverable required

Rep Deliverable:

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

Sales CRM:

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

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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

Sales CRM:

❏ 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?

<u>Authority Questions:</u>
❑Are their 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?

<u>Need Questions:</u>
❑<u>(Inbound)</u> 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? <u>Timeline Questions:</u>

❑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: **Sales CRM:**

❑ B.A.N.T Strategy   ❑ Change lead status to "Accepted Converted" to move forward

❑ Move lead out   ❑ If client does not qualify then move lead stage to "VIP
                              Nurture, Rejected"
❑ Send Goal letter

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...

Sales CRM:

- ❏ 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

Sales CRM:

- ❏ Change status to "D Champion Qualification"

Decision Maker Questions:

- ❏ What is your role? Who do your 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

Sales CRM:

❑ 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

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

Sales CRM:

- ❑ Change stage to "B Benefit/ Cost"

Actions / Tools:

- ❑ Proposal builder

A - Verbal

Client Deliverable:

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

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

Sales CRM:

- ❑ Change stage to "A Verbal"

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

Sales CRM:

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

Closed Lost

Sales CRM:

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

About RGC Sales Inc.

Senior VP sales executive that has generated over $500 million in sales revenue.

- VP of Sales and original founding shareholder of Canpages which sold for $225 million

- Enterprise Sales Manager and current shareholder of HootSuite which is ranked the #1 social media management tool for businesses by Forbes.

- VP of Sales and current shareholder of LocalSphere (now RTOWN.ca) which is ranked the 15th biggest digital media agency by Business in Vancouver.

Top 3% in Canada with over 8,000 LinkedIn followers

Linked in

My real passion is teaching, coaching and sharing my knowledge with others. My philosophy is simple; you can only help someone when you take the time to educate them. In 2015, I decided to step back from my senior executive VP Sales Leadership roles to dedicate my time to helping other businesses achieve their sales goals which lead to the creation of RGC Sales Inc.

As a sales professional, I've learned that potential customers are not going to wait for you in this fast-paced world. Device technology, the internet, and social media platforms are only going to increase in popularity, and become faster and easier for people to make buying decisions.

In today's world, consumers approach the purchase journey from a different path, which means as salespeople we need modern sales strategies and processes that match today's modern buyer behaviour.

RGC Sales Inc.
Sell More. Faster.

Contact

RGC Sales Inc. provides:

✓ **Sales Courses**
✓ **Sales Training**
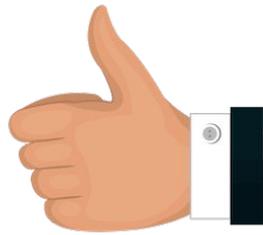✓ **Sales Coaching**
✓ **Sales Leadership**
✓ **Sales Management**

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Congrats!

Now take the next step.

Go back to RGC Sales

Sales Assessment

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THE END

"Sell unto others, as you would have them sell unto you!"

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