

Tools and templates



Streamlining your sales process

Does your sales process run as smoothly as you'd like? There are a number of easy ways you can streamline the process and prevent easy sales from slipping through the cracks.

Here are four steps to get you thinking about your sales process.

1. Define your ideal customer

Are you trying to be everything to everyone? Having a wide range of customers has its benefits, but it's not easy to develop a sales process that fits wildly different customer needs. Focus on targeting one type of customer, or customer need, at a time.

- Do you have a persona that describes your ideal customer?
- Can your team easily access and use this information?
- Are your sales and marketing team clear on who they should be targeting?

2. Assess your current process

Whether you're selling to customers over the phone, through a website or in a store, it's important that every step fits together and your team understands the process.

- How do you qualify potential leads?
- What type of meeting or action would you expect at each stage of the buying process?
- Do you understand what drives purchasing decisions?
- What supporting material could you use to help customers through the buying journey?
- What's your follow-up process once the sale has been completed?

3. Document each step

Documenting the steps you take is one of the easiest ways to streamline your process. Recording what works – and what doesn't – enables you to keep learning and improving.

- Do you have a document that outlines information to give at each stage, plus what to share before and after you've talked to a prospect?
- Have you defined questions to ask or stories to tell, and when it is best to do so?
- If you're selling online, do you know which stage customers tend to drop off and how best to re-engage them?
- Do you know the biggest selling point of your product or service for each type of customer?

Tools and templates



4. Make use of technology

Manual activities are time consuming, lead to a higher risk of error and can slow your sales process down. Explore technology options to see what could help.

- Use a CRM to organise leads and track prospects' progress through the sales cycle
- Build email templates based on past emails that have the highest open and click rates
- Implement Google Analytics to track how users work through your sales funnel online
- Online calendar tools like Calendly allow you to share free time slots with prospects, cutting down on the back and forth to set up meetings
- Use sites like Tripadvisor or Trustpilot to do some of the heavy lifting in building trust in your product or service