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The 5 Critical Areas Of The Sales Process

I'm sharing the five core areas of every sales process that all of your agents must be proficient at performing.

The salesforce must perform these tasks because your company can't afford to lose out on hard-earned opportunities from your marketing and advertising department.

One failed opportunity could damage the goodwill and reputation of your brand. Let's dive into the five core areas.

#1 - The customer intake process

You have to start your sales training with the client in hand scenario.

All salespeople will start with the most accessible opportunities. They gravitate to low-hanging fruit.

Attacking low-hanging fruit isn't a bad thing because you want your business not to miss out on the most apparent and highest converting opportunities. Therefore make sure the salesperson will not mess it up. Remember, any salesperson can screw up the best chance.

Start your sales training with a simple customer intake process. What are the core 5-10 questions you want the agent to perform each time a new client calls in or signs up?

#2 - Preparation for the appointment

Most sales agencies make the mistake of skipping this step. They start training the sales presentation. Missing preparation is a massive mistake because your salesperson conversion rates will suffer without preparation, and your cancellation rates will be through the roof.

1. Ask pre-appointment questions.
2. Send calendar invites.
3. Enter details and notes into the CRM.
4. Complete research and intelligence on your future client.

#3 - The sales presentation



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After all the preparation, your salesperson is ready to perform the sales presentation. Train your salesperson on how to build rapport, ask discovery questions, deliver a value presentation, demonstrate value, prove it works, provide references (reviews/social proof), and close.

#4 - The execution of the order

Now that the salesperson made the sale, they must execute the order.

Failure to execute will result in cancellations and refunds. The most direct salespeople with the highest close rate often lack the details for a smooth order transition.

Train your salesperson to make a smooth handoff to the production or operation team. What are all the steps to fulfill the order or perform the service?

Don't bog down your top salespeople with detailed work. Hire top-notch operational assistants that can integrate the order so that the salesperson can go out and make another sale for the company.

#5 - Client Service Experience

You never want the client to feel like they were sold and abandoned.

Train your salespeople to follow up on their closed clients to see how the experience is going or went so that they can assist.

People don't care how much you know until they know how much you care.

If you can do this, you will have repeat clients. If you fail to follow up on the order or service, you will lose a repeat client and all their referrals.

A new client costs the company 7x as much as it does to retain a client.

Start training these five areas. Create a written step-by-step framework for your salespeople to follow for each area: Intake, Preparation, Presentation, Execution, Experience.

Go out and make sales.