Documenting Your Client's Sales Process

Most sales processes can be defined in 7 basic steps:

1. Prospect
2. Connect and qualify
3. Research
4. Present
5. Handle objections
6. Close
7. Communicate and continue to sell

To learn about each step in more detail, read this guide on how to define a sales process.

For each stage, you should ask your client targeted questions to learn more about their process:

1. **Prospect**

Question	**Document the client's answer:**
How do their salespeople source new, early-stage leads?	
How much of the prospecting process is manual, vs. reliant on a third-party tool or service that supplies prospects?	
Do salespeople collaborate on prospecting?	

2. **Connect and qualify**

Question	**Document the client's answer:**
How do the client's reps make contact with early-stage leads to gather information and qualify them?	

What channels of communication are used for early-stage or cold outreach?	
Does the client measure the success of cold outreach methods, segmented by channel (phone, email, etc.)?	

3. **Research**

Question	Document the client's answer:
How do the client's salespeople learn more about the prospect to offer a more tailored, consultative sales experience?	
Does the marketing team gather any data on the prospect's website behavior, interests, or any other details that can be shared with sales?	
Are any integrations or data enrichment tools/services used to gain a more complete picture of the prospect?	

4. **Present**

Question	Document the client's answer:
How do the client's salespeople formally present their recommendations to the prospect, to make a sale?	
Does the client's sales management team measure or track how salespeople present to clients?	
Do salespeople use any standard enablement resources to help them sell more effectively?	

What is the conversion rate for presentations?	

5. **Handle objections**

Question	Document the client's answer:
What are the most frequent objections faced by salespeople during and after the presentation stage?	
How do individual salespeople respond to each kind of objection?	
Have any playbooks for individual objections been developed?	
Which objections seem to pose the highest risk in terms of derailing the sale?	

6. **Close**

Question	Document the client's answer:
What late-stage activities need to happen for salespeople to bring a deal to the finish line?	
How are budget questions discussed?	
What are the primary obstacles that impede deals that are close to closing?	

7. **Communicate and continue to sell**

Question	Document the client's answer:
Does the client's sales team measure customer satisfaction and NPS?	

Who handles the client relationship after the sale has closed?	
Has any analysis been done on clients who tend to purchase more vs those who don't?	