

How To Design a Sales Process for B2B Sales

#1 Tool for The Dream Sales Team





How Can You Grow & Develop Your Sales Pipe If You Don't Know What You're Doing?



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- **My passion** is to grow people and organizations.
- **I love to create** customer-focused solutions and processes that last.
- **My goal is** to create a positive effect for over 100 million people all over the world.
- **I think** giraffes are cool.

An aerial photograph of a dense city skyline, likely New York City, featuring numerous skyscrapers and buildings. The sky is overcast with grey clouds. A white rectangular box is superimposed over the center of the image, containing the title text. The text is in a bold, white, sans-serif font.

How To Design a Sales Process for B2B Sales



What Is a Sales Process?

A sales process is the typical series of predictable events, or phases, required to sell a product or a service.

DEFINITION



Sales processes can **vary greatly** among organizations, products and services.

Ultimately, every sales manager must ensure that their sales process and its corresponding phases are **as short as possible**.

Why Should I Define The Sales Process?

Higher Conversion



Increase the conversion rate and you increase sales. By understanding the process in detail you can start to make it more efficient and add tools that will help your sales team to better close deals.

Tips: Make sure that your salespeople make an effort to get to know prospects' businesses better than any competitors do.

Why Should I Define The Sales Process?

Bigger Deals



By truly understanding how your sales process works and then managing it, you can make sure that salespeople do the steps necessary to close big deals.

Tips: One important step is that the salesperson find out why, when and how bigger companies buy and execute a proactive plan. Make sure it is a step in your sales process.

Why Should I Define The Sales Process?

Less Time

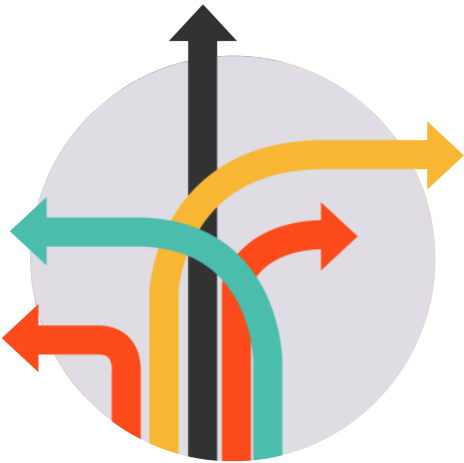


A lot of sales peoples time is wasted on deals that will never happen. A great sales process will help salespeople & management to recognize a lost deal early.

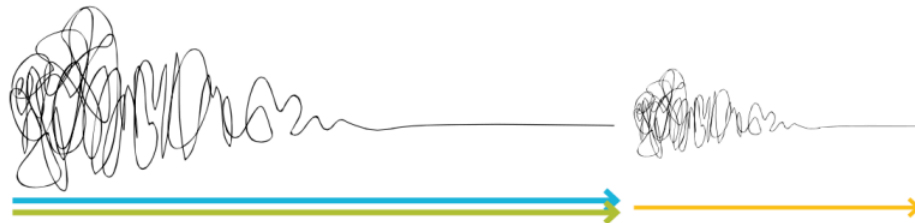
Tips: Make sure that your salespeople learn the decision process of the company that buys from you to make sure you don't waste time.

The Creation is Not a Straight Line

Before You Start



The creation of a sales process is not a straight line. It's a lovely mess that gets more clear and straight, the more you learn and develop it. Suddenly the world or your business change and you have to start over. If you did a good job the first time. This time you will do it faster.



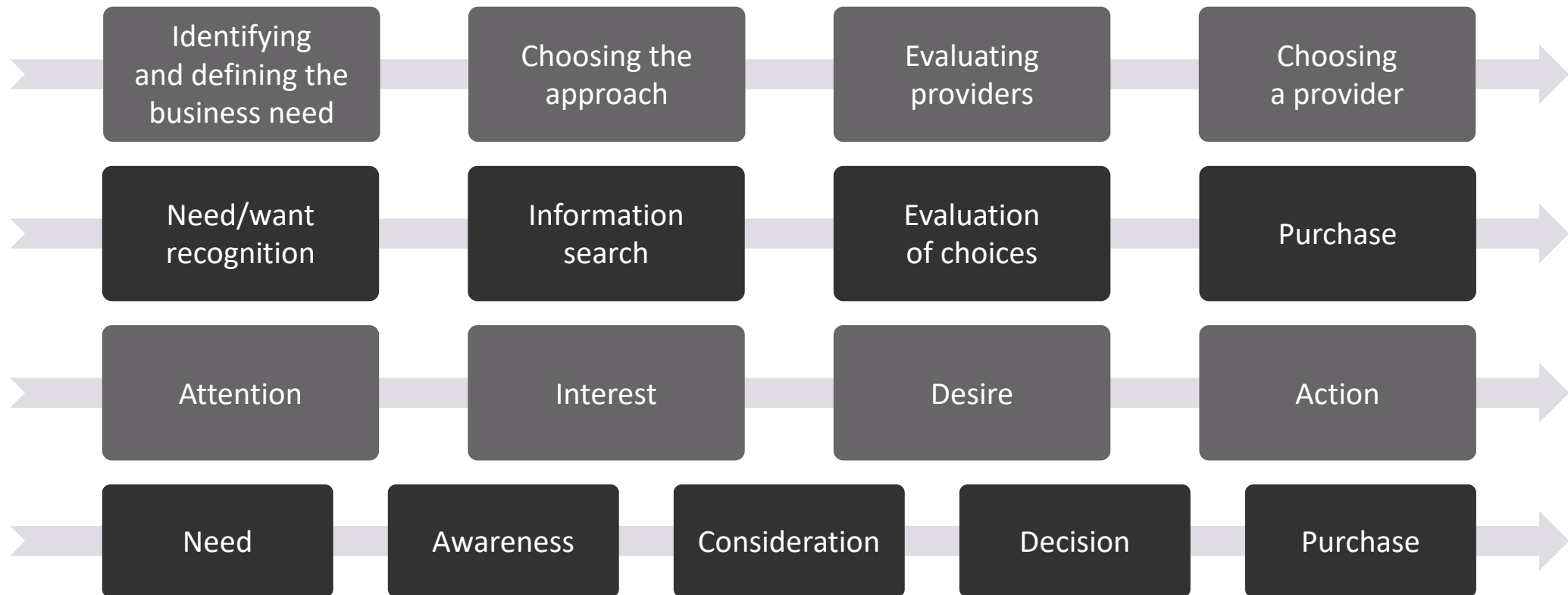


Great Design Starts From The Right Perspective.

The Customer

Step 1

Define Customer Buying Process



Source: Gartner (June 2011)

Step 1

Define Customer Buying Process

Think through your customers' buying process & the main decision points from customers' point of view. Involve your sales team to get valuable input and call some of your best customers to verify your ideas.

Step 1

Define Customer Buying Process

Create the steps and define in detail what the customer's jobs are in each step. Define social jobs (how other see the customer), emotional jobs (what the customer feel) and functional jobs (what needs to be done).

Step 2

Define Sales Stages



Define Sales Stages that matches the customers' buying stages. Make sure to discuss the sales stages in your organization. Get input and initial understanding. Make sure to spend some time checking that your Stages match all your typical sales scenarios.

Define sales stages that match the customer buying process.

1. Research
2. Intro Meeting
3. Presentation
4. Demo
5. Product Evaluation (Field or Lab Trial)
6. Product Approval
7. First Order Received

Example Sales Process Technology Company

7 stages where the focus is on important actions that need to be taken to move the sales process forward and bring the sale to a successful conclusion.

I like this example because it is very easy for salespeople to understand what the next step is. This type of sales process works well when you are only selling one type of product or solution.

[Comment](#)

1. **Suspect**
2. **Un-Qualified Prospect**
3. **Qualified Prospect**
4. **Strong Interest in Solution**
5. **Selects Solution**
6. **Solution Deployment**

Example

Sales Process

Solution Sales

6 stages where qualification of the prospect is important and they have decided to make it clear in the process.

In the Un-Qualified stage they spend time on presentations, understand pain points, the customer's jobs and the creation of an unique value proposition.

In the Qualified stage the value proposition is well defined and communicated. Here it is explored if a RFQ or RFP is needed and how the prospect does purchases.

[Comment](#)

- 0.1 Attract Strangers and generate leads
- 0.2 Build Interest and create vision
- 0.3 Marketing Qualified Lead MQL
- 0.4 Sales Qualified Lead SQL

- 1. Qualified**
- 2. Solution Definition**
- 3. Proposal Submitted**
- 4. Shortlisted**
- 5. Project confirmed**
- 6. Contract Negotiation**
- 7. Contract Closure**
- 8. Closed - Won**

Example Sales Process Marketing plus Sales

In this example marketing and sales processes are well aligned and are collaborating.

The first 4 steps are marketing/ sales related where automated lead nurturing helps the sales team understand what leads that are interesting using tools like [Hubspot](#).

Once the lead is converted into an opportunity the sales team focus on creating a value-based proposition and get the project confirmed with the prospect decision makers.

Comment

1. **Exploration** - Educate prospect & confirm interest
2. **Interest & Revenue Confirmed** - Prospect see full potential and confirm they want to continue
3. **Solution Approved Internally** - Prospect have discussed solution internally and got approval to continue
4. **Detailed Plan** - Marketing plan, integration and flows are developed. Prospect confirms selected solution
5. **Contract Closure** - Contract started and negotiation of the terms

Example Sales Process Revenue Deals

In this sales process, the objective is to create a deal where several parties share the revenue from a product. The sales person would start by making sure prospect loves the product/solution. It then continues with getting the buy-in from management and create detailed plans. The final step is the signing of a contract.

An example could be a process where Spotify make deals with companies to do launches in new countries. The revenue generated in the specific country would be shared between Spotify and the partner that helps them launch.

[Comment](#)

Important



Once you have created your sales process.
Go back to step 1 & make sure it is truly
aligned to your customer buying process.

Step 3

Define The Objective

& Targeted Outcome For Each Stage



What are the goal and objective with each stage? What are the salesperson supposed to achieve? Define the objectives & outcome of each stage.

Step 4

Define Actions

for Each Stage



Every stage contains small steps and actions that every salesperson should do in order to efficiently move the deal to each stage & reach the targeted outcome. Define the actions that is important for your sales process.

Step 5

Define Sales Tools

for Each Stage



What tools need to be available for your sales team to be able to reach the targeted outcome? Do your team need a great value proposition, referrals, discovery questions, success stories, demos or presentations? Make sure to define what tools that need to be available for each stage & be creative. Great tools will speed up the process.

Step 5

Define Sales Tools

for Each Stage



Sales tools have a **second and** very important purpose. They help you build trust with the prospect. Advanced products and services take time to fully understand and create questions throughout the entire sales process. With tools that answer any question the prospect may have, you show how professional and well prepared you are.



Pre-Written Emails

Use pre-written emails for the start of the sales process. Make sure you craft them well and make them brilliant.



Automated Emails for New Leads

With hundreds of leads coming in every week you need to make sure they get real love. Use [Hubspot Sales](#) to create an automated email flow with valuable information for your leads.



Amazing Sales Presentations

According to Garner research the sales presentation is a key tool of what makes prospects choose a specific vendor. Make sure you spend resources on making the presentations into masterpieces.



Product Demo

If you have a product or service you can demo.
You should make sure you can demo it well.
I usually spend hundreds of hours to make the
demo better.



Persona Guide

Overview of each buyer persona. I have created a guide for How to create customer profiles / buyer personas for B2B Sales. [Click here to check it out.](#)



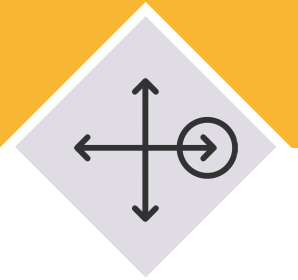
Competitor Information

Strengths and weaknesses to be used if brought up in a conversation.



Customer References

Prospects love great customer stories
where the end value is clearly explained.



Conversation Guides

Questions that should be asked, clear value propositions, pains and solutions.

“

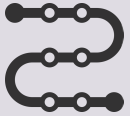
Analysts Statements

Always great when you can reference an expert.



ROI Calculations

Show the customer what value they will get if they invest in your solution.



Pre-contract & Post-contract Timelines

If you're at a startup, most people will not have bought what you're selling. They won't know how you plan to go from pitch to launch, unintentionally giving them permission to delay and dawdle. Create a detailed timeline outlining each step with customers. Get the customer to confirm and accept.

Step 6

Define Marketing Tools

for Each Stage



What marketing tools needs to be available for your sales team to be able to reach the targeted outcome? Do they need a great website, articles, whitepapers, infographics, success stories?



Web Page

If you don't have an amazingly designed web page that catch leads for you every day – Get one!



Whitepapers

Create papers that help your prospects. **Example subjects:**

- “How to....”
- “5 strategies for ...”
- “Why”
- “Avoid these 5 mistakes...”



Blog Articles

The blog helps you get leads and it is also a great resource to nurture prospects. Craft sales emails and add a link to an article that is a good fit to move the opportunity forward.



Infographics

Easy to consume and great for prospects early in the buying process.



SlideShare Presentations

SlideShare is a great way to make your presentations public and easy to access.



Business Cards

Please do not create sloppy cards.
Be different and create amazing
cards that stand out.

This Tip Can Earn You Millions

It's All About Speed

The Tools Speed up the Sales Cycle



The key to great sales & marketing tools is that they should speed up your sales cycle.

They remove uncertainty, answer questions, makes salespeople more professional, etc. Make sure your tools do this.

Step 7

Continue to Improve



Once your sales process is defined you need to evaluate it and continuously improve it. Maybe some steps and actions don't make sense for your sales team? Then you need to see what you can do to define them better.

Example



SalesTechnik

This is a good example of how you can define your sales process & all the pre work, milestones, customer buying process, targeted outcome, selling tools & marketing tools around each step.

Download the pdf file [here](#)

Opportunity Conversion Process

SalesTechnik

Velocity

Opportunity Generators	Sales History/Customer List Referral Sources/Alliances Networking Events/Business Events Market Intelligence			Suppliers Lists Industry lists Seminars/Speaking Engagements Active Marketing Efforts		Competitive Intelligence Trade Shows/Conferences Newsletter / E-Blast Leads Inbound Marketing Efforts	
Suspects	Pre-Work	Milestones	Customer Buying Process	Targeted Outcome	Selling Tools	Marketing Support Tools	
Prospect	Identify Suspect Awareness Made Information Sent Action Plan Set Market Presence Credibility Capbility	Message Received Make the Call Contact Made Two Wat Conversation Qualify Target Or Disqualify Prospect	Not Looking Need Help Dont Know Looking at Trends Tracking Competition	Awareness Shown Interest Identify Target Qualify Target Say "Goodbye" Information Requested	Prof. Client Profile Success Stories Referrals Account Audit Form Request for Proposal	Website, Newsletter Social Media, Public Relations Email Signature, Thank You Card, Billing Reports/SBR Pitchbook/Cut Sheets Proposal/Contract Success Stories, Phone Scripts Sales/Customer Support	
Targets	Warm Introduction Qualify "Target" as ideal. Pre-Seed Information Meeting Scheduled Action Plan Set	Handle Put-Offs Identify Decision Maker Measure Potential Give Reason to Meet Acknowledge the Problem Identify Buying Process Establish Timeline Qualify Opportunity -or- Disqualify Opportunity	Triggering Event Problem Surfaces Problem Studied Consequences Identified Worth Solving Looking for an Excuse Want to Learn More Look for Options Need Defined	Validate Opportunity Schedule a Meeting Identify another BANT Clear Next Step	Prof. Client Profile Value Proposition Comp Advantages Success Stories Referral Discovery Questions	Website, Newsletter Social Media, Public Relations Email Signature, Thank You Card, Billing Reports/SBR Pitchbook/Cut Sheets Proposal/Contract Success Stories, Phone Scripts Sales/Customer Support	
Discovery Meetings	Background Information Meeting Scheduled Action Plan Set Know B.A.N.T. Resources Secured Team Commitment	Learn More about their business How do they make money? What do they do well? What to do better? Identify BANT Identify Need Qualify Opportunity Synergy Learn "Why"	Research option Establish Requirements Determine Credibility Determine Requirements Trust - Meet Team Determine ROI Assessing	Have a Solution Soft Close Develop solution Clear Next Step Identify BANT You Can Help Team Introduced Evaluation Undertaken Trust Built Credibility Established Identify Stakeholders	Sales Call Anatomy Discover Questions Success Stories Account Audit Referral Cut Sheets Presentation Internal Resources	Website, Newsletter Social Media, Public Relations Email Signature, Thank You Card, Billing Reports/SBR Pitchbook/Cut Sheets Proposal/Contract Success Stories, Phone Scripts Sales/Customer Support	
Solutions	BANT Identified Questions answered Know "how they buy" Reconsitd Internal Resources Opportunity Filter Action Plan Set Know Your Value	Timely Response Internal Support Buy-In Project Management Pricing/Terms Capacity in Place	Defined a Need Framing Expectations Exploring Options Reconfirm Requirements Developing Case Waiting for You Looking for Excuses Solve Themselves?	Win-Win Solution Objections Navigated Action Plan Clear Next Step Negotiation Acceptance of Terms Approval Submitted Soft Close Sunergy	RFP Format Contract Format Discovery questions Audit Results Opportunity Filter Referral Technical Expertise Internal Resources	Website, Newsletter Social Media, Public Relations Email Signature, Thank You Card, Billing Reports/SBR Pitchbook/Cut Sheets Proposal/Contract Success Stories, Phone Scripts Sales/Customer Support	
Proposals	Solution Developed Decision Makers Present Meeting Scheduled Action Plan Set Internal Resources Add Value	Add Value to Business Handle Stalls Handle Questions Handle Objections Buy-In Soft Close ASK FOR THE ORDER	Evaluate Options in Detail Stakeholder Consensus Finalize Case Negotiate Purchase Making Excuses	Commitment for Business Clear Next step Action Plan PO Generated Resources in Place	Testimonial Answers from Questions Success stories Audit Results Referral Opportunity filter Technical Expertise Internal Resources	Website, Newsletter Social Media, Public Relations Email Signature, Thank You Card, Billing Reports/SBR Pitchbook/Cut Sheets Proposal/Contract Success Stories, Phone Scripts Sales/Customer Support	
Partnering	Defined Offering Pre-Commitment Identify Win-Win Added Value Action Plan Set Internal Resources Set Contract Produced	Review Expections Finalize Terms Delivery Defined Payment Terms Agreed Purchase Order Produced Credit Approval Signed Contract	Finalize Terms Check References Confirm Decision Finalize Case Gain Approval Produce PO Expect Follow-Up Commitment	Soltuon Developed Decision Makers there Signed Contract PO Received Delivery Scheduled	Credit App Invoice Contract RFQ/RFP Success Stories Audit Results Referral Opportunity Filter Technical Expertise Internal Resources	Website, Newsletter Social Media, Public Relations Email Signature, Thank You Card, Billing Reports/SBR Pitchbook/Cut Sheets Proposal/Contract Success Stories, Phone Scripts Sales/Customer Support	
Post	Delivery Utilization Paid as Agreed Strategic Business Review	Reinstate the Value Review Success Ask for Referral Testimonial Case Study Subject Additional Opportunities Market Intelligence	Implement Solution Realize Value Validate Decision Additional Solutions	Repeat Business Referral Additional Business	Review Scope Strategic Business Review Endorsements	Website, Newsletter Social Media, Public Relations Email Signature, Thank You Card, Billing Reports/SBR Pitchbook/Cut Sheets Proposal/Contract Success Stories, Phone Scripts Sales/Customer Support	



Volume



Close = Goal/ "Ideal Client" Avg. Value

Personal Goal = Target Revenue/Commission %

A close-up, low-angle shot of a person's hands typing on a laptop keyboard. The scene is dimly lit, with a soft light source from the left creating a gentle glow on the hands and the laptop. The background is blurred, showing what appears to be an office environment with a desk and some equipment. The overall mood is professional and focused.

**Download
Template**



Sales Process Template

I love to make your life easier. [Download](#) this Sales Process Template. Modify it and create your own version.

Tips





Numbers You Should Know

- 5 emails sent to a prospect gives 1 reply.
- It takes 21 meetings to close a deal.

This means you need to send a lot of emails and attend a lot of meetings.
It is a numbers game.

Factor 1

6 Success Factors

for Your Sales Process



Assign a person responsible. To many times I've seen management created sales processes that no one uses or actually understand. Assign a person that loves processes to constantly educate the sales team and improve the process. Make sure to constantly follow up and help sales understand and use the process.

Factor 2

6 Success Factors

for Your Sales Process



Implement IT tools to support the process.
There are a lot of really bad CRM systems out there. Make sure you carefully select a really good CRM system and marketing system. Then add some great tools that help the sales team be efficient.

Factor 3

6 Success Factors

for Your Sales Process



A great salesperson is most likely not a great sales manager. Why do some CEOs believe that a great salesperson can be a great sales manager? The skills required to be a great sales manager is not the same.

Factor 3

6 Success Factors

for Your Sales Process



Make sure to find a sales manager who loves:

- Process
- Coaching & Motivation
- Building Amazing Sales Tools
- Improvements
- Efficient Meetings
- CRM Systems
- Inter-Team Communication
- Reporting & Analysis

Factor 4

6 Success Factors

for Your Sales Process



Learn everyone in sales to create amazing value propositions. Chokingly often salespeople don't know how to create great value propositions. They're focused on the product or start an egocentric pitch. Customers don't care about egocentric pitches. They want to understand the outcome for them and not the year the company was founded.

[Learn](#) How To Craft Strong Value Propositions For B2B

Learn How to...

Write Value Propositions

Use **valueproposition** coupon to get my [value proposition course](#) on [udemy.com](#) for the ridiculous low price 16 USD (20% discount included)

How to craft Customer centric Value Propositions

Learn 4 amazing Value Proposition tools the super professionals use. Craft presentations and text that will impress.

★★★★☆ 4.2 (20 ratings) • 1,252 students enrolled

Instructed by [Daniel Nilsson](#) Business / Entrepreneurship

\$16

HOW TO CRAFT A CUSTOMER CENTRIC VALUE PROPOSITION

Learn 4 amazing Value Proposition tools the super professionals use

0:00/1:54

What You Will Get From This Course



Over 24 lectures and 1 hour of content!



Learn 4 amazing tools to create value propositions for B2B.



Advanced value proposition analytics.



Design your own Value Proposition.



Start your own path to become a Value Proposition Professional.

[Check Out The Course! Click HERE](#)

Factor 5

6 Success Factors

for Your Sales Process



Turbo Boost your Process. Take a hard look at your sales cycle and list all the ways you could save time, you're sure to spot opportunities. The shorter the sales cycle is the higher success rate you will have.

Factor 6

6 Success Factors

for Your Sales Process



Qualify ruthlessly. Being a startup you are most likely wasting time on prospects that can never be. Create a rigorous internal qualification framework (be inspired by the BANT System) & dramatically improve the productivity of the sales team.

Bonus Tip

Trust The Value



“Behave like you’re not selling, but simply facilitating the buying process. Have trust in the level of value, you’re offering.”



3 Amazing Sales Tools I Use Every Day

Tool 1

Hubspot Sales

Why is it so good?

One of the hardships being in sales is that you send hundreds of emails and often don't get any response or feedback. It is tiring and many times you don't know if anyone ever sees your emails. Hubspot Sales is a solution to this problem.

What do I get?

See Who Opens & Clicks Your Emails

Show you if someone received and opened an email.
It works directly from Google mail, Apple mail & Outlook.

Profiles in Your Inbox

See relevant information for the receiver as you type
in your inbox.

Schedule Emails

Write emails now and send them later.

How do I get this tool?

Go to hubspot.com and sign up



Tool 2

Calendly

Why is it so good?

Ok lets schedule a meeting! And there you have it. It is just so cumbersome for both you and the client. You create 3 time slots send them to the client that don't reply for two weeks and when they reply that time slot is already booked for another client. Do I need to continue? Calendly solves this issue for both you and your clients convenience.

What do I get?

Make It Possible for Clients to Book a Meeting With You Easily

You client easily see your available time slots.

Automatic Sync With Your Calendar

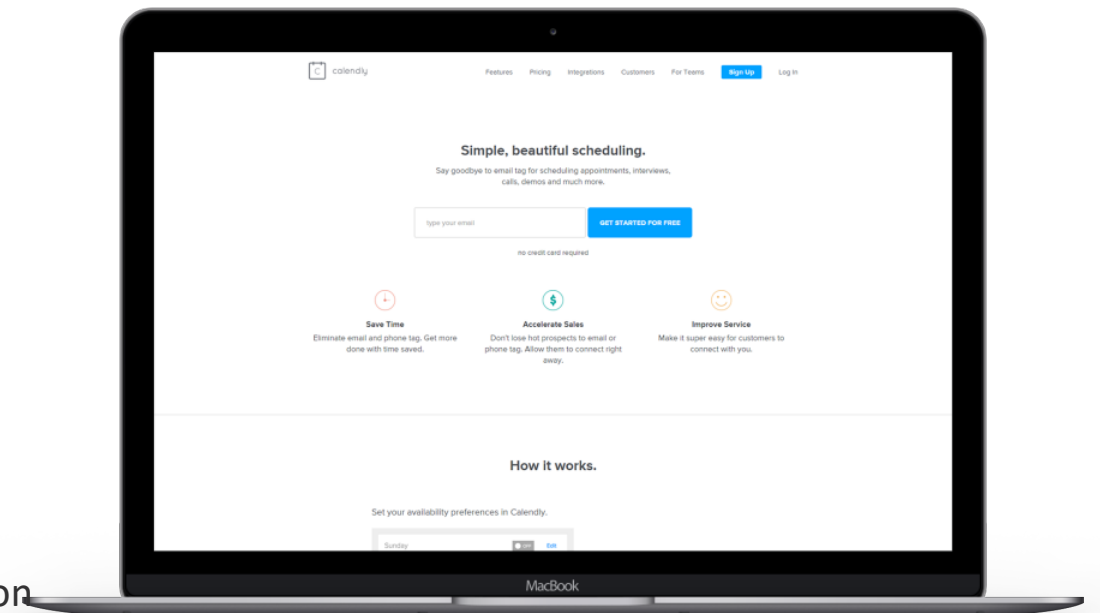
Automatic sync with your Office 365 or Google calendar.

Automatic Booking

When your client find a time slot it is one click, fill in some information and then click OK.

How do I get this tool?

Go to calendly.com and sign up



Daniel's Tips

on How to Use Calendly



I have added the meeting link to all my emails to allow clients to easily book a meeting with me. Also when I suggest meetings I ask people to go to the link and see what time slots that are available.

Tool 3

Wunderlist

Why is it so good?

I really love this really easy to use To Do list and I love it because I have it on all my devices, it is synced and it is so easy for me to add new tasks.

What do I get?

Add All Your Tasks

Keep track of all your tasks & when you need to get them done.

Sort Into Groups

I have all tasks sorted into different groups & projects so I get a better overview.

Assign Tasks to Colleagues

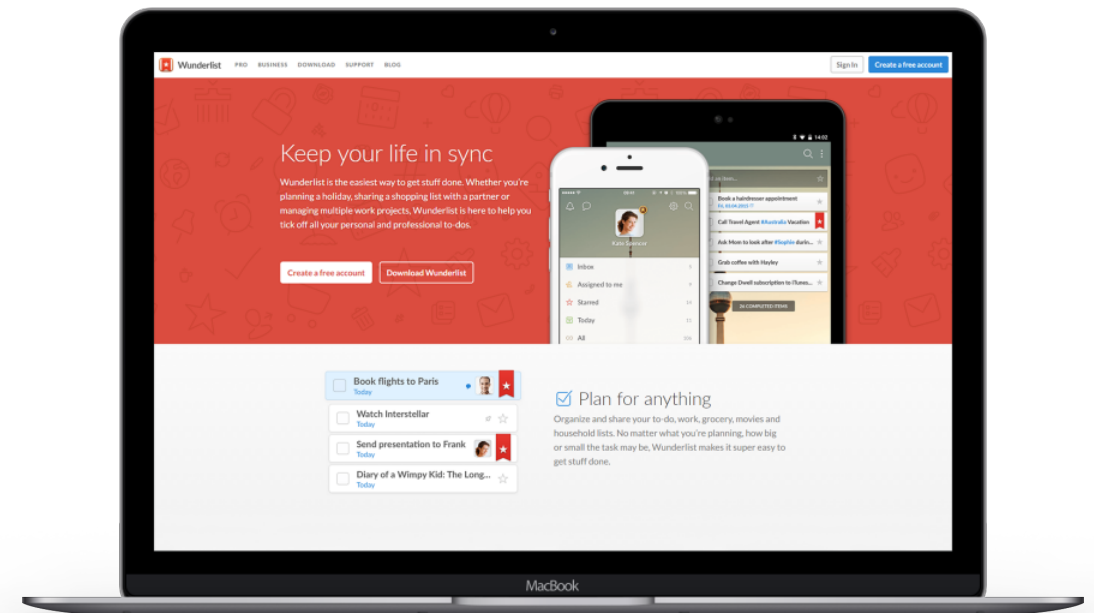
I love that I can easily assign a task to a colleague.

Multiple Devices

Use Wunderlist on multiple devices – makes it easy to manage tasks wherever you are.

How do I get this tool?

Go to wunderlist.com and sign up



A modern conference room with large windows and a long table. The room features a long, dark wood conference table surrounded by several beige leather office chairs on casters. The room has large floor-to-ceiling windows that offer a view of a cityscape. The ceiling is a grid of acoustic tiles with recessed lighting. The floor is covered in a dark, patterned carpet. The overall atmosphere is professional and contemporary.

The Best Web Meeting Tool

The Best Web Meeting Tool

Zoom

Why is it so good?

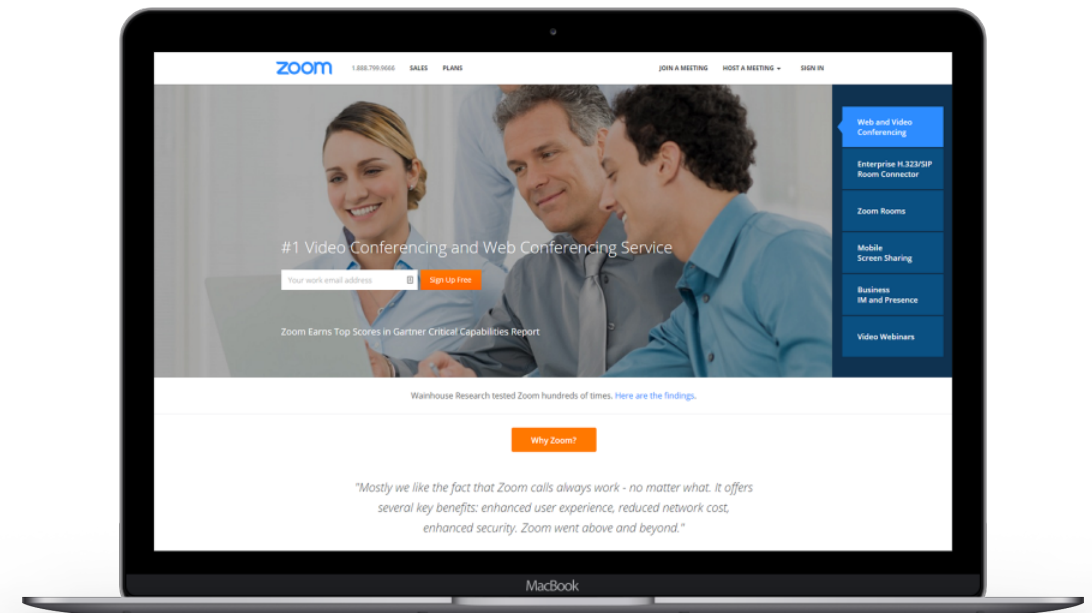
I love this meeting tool because it just works. There are almost never any issues and customers just click and connect.

What do I get?

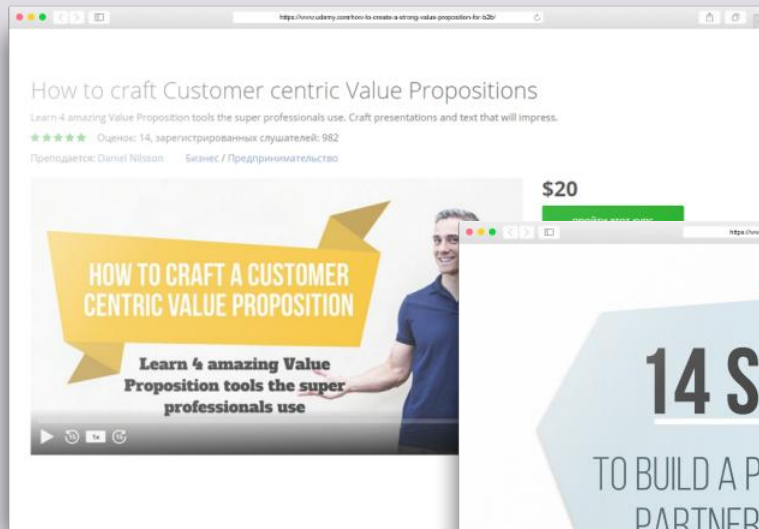
- **Video Conferencing**
- **Mobile Screen Sharing**
- **Prospects Can Attend The Meeting From Any Device**
- **Prospects Can Call in Using International Numbers**

How do I get this tool?

Go to zoom.us and [sign up](#)



Download My Free Tools



Download [here](#)



Download [here](#)



Download [here](#)

User Quotes

These are quotes from spontaneous thank you emails I've received. If you have any questions send an email to info@daniel-one.com

“

Incredibly helpful document and so I want to pass along my thanks for creating and posting it. Greatly appreciate it!

Greg Mand, USA

“

I think this is a great tool for my sales folks.

Michael V. Nguyen, California, USA

“

I've recently started working for a B2B sales company & i came to read your slides about defining the sales process. It was very effective.

Melbin Thomas, USA



Good Luck

With Your Sales Process



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