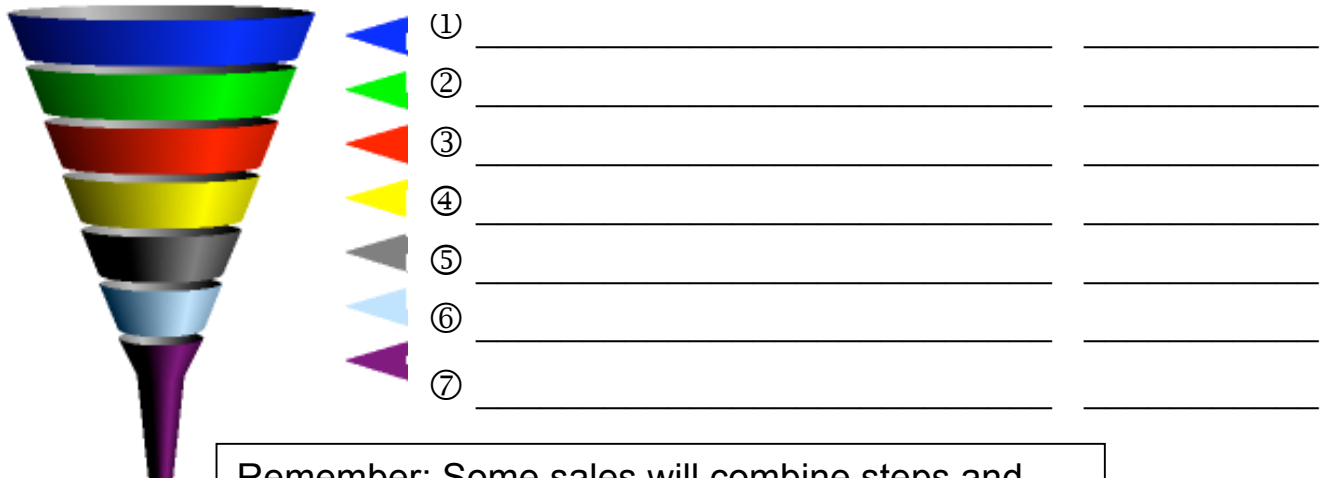


MY SALES PROCESS: INTRODUCTION TO CLOSE

Step 1: Identify the steps of your sale:

It doesn't have to be 7 steps, but it should be about 5-7. Example: New Opportunity, Approach, Planned to Meet, Analysis Complete, Proposal Submitted, Contract Signed, Follow Up and CRM. Use phrases that make sense to you.



Remember: Some sales will combine steps and some may skip steps, but you'll always have the first and last steps (the intro & close)

Step 2: Describe what should happen:

in each step and also what needs to be confirmed before moving to the next.

- ① _____
- ② _____
- ③ _____
- ④ _____
- ⑤ _____
- ⑥ _____

Step 3: Timeframes:

for each step, identify how long (on average) your prospect stays at that step: use the lines to the right up in step 1.

Step 4: Allocations:

You must always have prospects pretty evenly distributed throughout the funnel. Keep the sales funnel filled!