

What are the Steps in a Sales Process?

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Strategy is crucial in any sales journey.

To genuinely convert leads and close deals, sales professionals need to know how to qualify leads, find prospective customers, handle objections, and build rapport. While some confident sales professionals assume they can just 'wing it' for every customer interaction, the truth is that a clear, consistent, and calculated sales process is often key to success.

But what are the steps in a sales process? What kind of strategies does a sales rep need to implement to make sure they can close the deal with every customer?

Here's your complete guide to following, and building a sales process.

What is a Sales Process? An Introduction

Let's start with the basics: what is a sales process?

A sales process is essentially a roadmap a sales rep can follow when moving prospects through a sales cycle. It's a step-by-step guide to managing the stages that customers move through when making purchasing decisions. With the right sales process, a sales rep can take customers all the way from the point when they become aware of an issue, to the stage when they're ready to close the deal.

Sales processes give teams the guidance they need to navigate the customer journey, transforming potential leads into dedicated customers and brand advocates. Not only does a sales process make teams more effective, but it also provides useful insights to business leaders too.

With a comprehensive selling process, companies can collect insights into why certain leads aren't turning into paying customers, and discover new ways of increasing revenue and retention rates.

Why Companies Need an Effective Sales Process

Closing a sale is a complicated process, no matter how effective you are at selling.

There's more to connecting with and retaining paying customers than knowing how to present a great sales pitch. Reps need to know how to master each stage of the sales funnel, to build rapport with customers, inspire trust, and increase conversions.

Providing teams with guidance to the steps in a sales process ensures they can consistently deliver results based on a clear framework. It also means companies can benefit from:

- **Less time spent prospecting:** A good sales process makes it easy to accelerate prospect and lead generation, by helping teams to qualify each opportunity. This means you spend less time interacting with the wrong leads, and more time converting customers.
- **Improved customer experiences:** When sales reps follow a consistent process for qualifying and nurturing leads, this creates consistency in the customer experience. Companies can respond more actively to the needs of their customers, and simplify sales cycles.
- **Quicker employee training:** Onboarding and training new sales professionals is much easier when you already have a clear guide to the sales process. Recruits will be able to rapidly adapt to your company's processes, and integrate themselves into the team.
- **Improved insights:** By monitoring each of the steps in the sales process and how they influence customer retention and conversion rates, companies can make better decisions. As you learn from your sales process, you'll become more effective at capturing customers.
- **Increased revenue:** When sales reps know how to leverage every stage of the sales cycle effectively, they can more quickly and consistently close deals. Following the right selling process can increase your revenue, and improve customer retention.

What are the Steps in a Sales Process?

In today's evolving world, the sales process can often be quite a dynamic thing. Many sales professionals implement their own stages and methodologies into the sales cycle, based on what they learn over time. However, the basic framework for most sales processes is usually consistent.

The most common 7 steps included in a sales process are:

Step 1: Prospecting

Prospecting is the art of sourcing potential leads for your company. It's a vital part of the sales process, and essential to filling your lead pipeline. There are various prospecting methods companies can experiment with, from using cold calls and emails to reach out to possible customers, to connecting with buyers on sites like LinkedIn.

Prospecting also generally involves some research. The more reps learn about a prospect, the more they can customize their conversations and pitches to the specific needs of each buyer.

Step 2: Qualifying Leads

Next, sales reps need to qualify leads to ensure they're a good fit for the company's products or services. Initial discovery calls allow sales reps to interact with leads, and gather information about their needs, goals, and expectations.

Reps usually use a variety of questions to determine whether a contact is suitable for their business. You might ask about a prospect's role in a business, their budget, and the specific problems they're trying to

solve. The more information you collect, the easier it will be to create a pitch that connects with your audience, and close the deal.

Step 3: Research

Though the prospecting stage often involves a little research, the majority of a sales rep's homework will begin after a lead is qualified. Once a sales rep knows a customer is a good fit for their business, they can research the company, and the contact, to create a more personalized sales experience.

The most important part of this stage is making sure you understand your customer's goals and challenges completely. You may even need to consider speaking with other people in the company from different departments for a more holistic insight. Based on your research, you can tailor the strategy you'll use to close the deal to each customer.

Step 4: The Sales Pitch

Armed with your research, the next step in the sales process is pitching your product or service to your customer. The focus here is on making sure customers understand the benefits of whatever you're selling, and why the solution is relevant to them.

You might create a presentation highlighting the core benefits of your product with step-by-step slides or video content. Or you may consider giving customers access to a free trial, where they can test the solution for themselves. No matter which strategy you choose, the pitch should always be tailored to the specific needs and requirements of the customer. The more personalized the sales cycle is, the more likely you are to ensure conversions.

Step 5: Handling objections

Even with a fantastic sales pitch, there's always a risk that your customers could be reluctant to make a purchase. Studies show around [60% of customers](#) say no at least four times before saying yes. This means any sales rep needs to know how to respond to objections correctly.

Listen carefully to the issues your customer raises during this stage, and validate their concerns. Let them know you understand their worries, then highlight how you can solve their problems. For instance, if your customer says they're worried about the cost of your product, you could say something like:

'I understand it's a big investment, but how much money are you losing on this process already? Our [other customer] managed to reduce costs in [x] by [x%] using the same solution.'

Step 6: Closing the deal

Once you've handled the objections your customer might have, the next step is to close the deal. You might agree on a contract or specific purchase with your customer, then choose a date for when the sale will be completed. Closing a sale can sometimes require a number of steps.

You might need to negotiate on pricing, speak to other decision makers to ensure buy-in, or provide various quotes and proposals for solutions. There are many different closing techniques sales people can experiment with, and each option should be outlined by the company's leadership.

Step 7: Nurture the relationship

Although closing deals is the 'end goal' for most sales professionals, it's not where the journey ends. Once you've made a sale, it's important to ensure you're preserving the relationship you've built with your new buyer. Check customers are happy with their purchase, and consider requesting feedback or reviews you can share with other customers in the future.

You could also ask your customers whether they can refer you to any other contacts who they think might benefit from your solution. The relationships you build with converted customers can also lead to additional revenue in future, through cross-selling and upselling opportunities.

How to Create a Sales Process that Works

While there's no one-size-fits-all strategy for building a sales process that constantly delivers results, the best solutions should always be flexible, customer-focused, and aligned with your buyer's journey. To start building a sales process of your own:

- **Work backwards from goals:** Define exactly what you want to achieve at the end of each step or stage in the sales journey, and work backwards from there. For instance, if you want to increase retention in the last stage of the journey, you may use follow-ups with customers, loyalty programs, and referral campaigns.
- **Get everyone involved:** When defining goals for sales teams, it's important to get them, and other stakeholders involved. Sharing clear targets and requirements with each employee is the best way to make sure everyone in your team is on the same page.
- **Define each step clearly:** Make sure each step in the sales journey is clear, and map your strategy based on methods that have worked for you in the past. Determine which steps in the journey add the most value to your sales process, and generate the most conversions.
- **Align with your buyer:** Ensure you understand the steps your customers usually take in their own sales cycle when creating your sales process. Creating a handful of customer personas and mapping their journey will help you to ensure you're utilizing the right methods at the correct time to increase sales.
- **Tweak and optimize:** A sales process more of a guideline than a constant set of rules. It needs to dynamically adapt to your changing audience, and the goals of your business. Measure what works and what doesn't, and keep track of the success of every stage in your journey. This will help you to optimize your results.

Optimizing the Sales Process

Now you know the answer to 'what are the steps in a sales process'? you can begin developing strategies of your own. With the right strategy, you'll be able to improve your sales results, close more deals, and build stronger relationships with your target audience.

Just remember, a sales process should always be dynamic, and respond to feedback from internal team members and customers alike. As your business evolves, your sales strategy should too.

Refine your sales process by learning from experts in sales. Sign up for [Hard Skill Exchange](#) today!??

HSE Team