Sales Process Mapping
Best Practices for Sales Management

July 2008
The Sales Management Association
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## Sales Process Mapping: Best Practices

### Four Common Mistakes

<table>
<thead>
<tr>
<th>Process Mapping Mistakes</th>
<th>Principles that Yield Powerful Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Map all the details, losing track of the big picture.</td>
<td>Foreground goals in organizing your process map.</td>
</tr>
<tr>
<td><strong>Focus on the seller, instead of the customer.</strong></td>
<td>Determine how to create value for the customer throughout the process.</td>
</tr>
<tr>
<td>Map the process without showing how the results will be measured.</td>
<td>Map tools, skills, and performance metrics along with the process.</td>
</tr>
<tr>
<td><strong>Buy someone else’s “ideal” sales process.</strong></td>
<td>Engage your people in process mapping to define problems and solutions.</td>
</tr>
</tbody>
</table>
Sales Process Mapping: Best Practices
Too many steps make this process hard to use
Sales Process Mapping: Best Practices

Grouping activities according to goals creates focus

Demand Generation
- Research Market
- Conduct Sales Training
- Define Qualification Criteria
- Generate Suspects

Qualifying
- Assess Account Potential
- Investigate Business
- Plan Account
- Engage Prospect
- Foundation Presentation
- Identify Opportunities

Proposing
- Engage Resources
- Analyze Needs
- Present Recommendations
- Develop Proposal & Pricing
- Agree on Implementation

Delivering
- Finalize Contract
- Implement Service
- Bill Customer
- Manage Account (Ongoing)
- Develop Account/ Business Plan
- Account Review

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Sales Process Mapping: Best Practices

This process map focuses on seller activities

Winning New Business

- **APPROACH**
  - Collect Profile Data
  - Approach Letter
  - Contact CEO & Schedule Mtnng
  - Conduct Meeting
  - Capture Info & Next Steps
  - Followup, Update Profile

- **VERIFICATION**
  - Perform Verification Data Collection
  - Conduct Value Analysis
  - Complete Verification Request
  - Verification Mtng w/ CEO
  - Followup

- **PROPOSAL**
  - Define Business Arrangement
  - Complete Proposal Materials
  - Conduct Proposal Meeting
  - Followup
  - Obtain Verbal Agr. w/ CEO
  - Complete Business Arrangement Summary Doc.

Contracting

- **PREPARATION**
  - Quality Check Against Approved Pricing
  - Business Arrangement Summary Document
  - Determine Type of Arrangement
  - Set Up Client & Contract System
  - Generate Contract Draft

- **NEGOTIATION**
  - Obtain Client Feedback
  - Coordinate Negotiations
  - Produce Modified Contract Draft
  - Proof Final Pricing & Language
  - Present to Client and Close

- **EXECUTION**
  - Receive Contract & Distribute for Internal Signature
  - Distribute Executed Contract
  - Update Contract System
  - Provide Information to Utilities as Needed

3 Signed Contracts
Sales Process Mapping: Best Practices

This revised sales process focuses on customer interaction

Demand Generation
- Assist Marketing
- Voice of the Customer
- Networking (Tradeshows, Referrals, Seminars)
- Distribute Lead

Qualifying
- Assess Account/Opportunity
- Research
- Gain Access
- Business Presentation

Proposing
- Needs Analysis
- Demo/Proposal Preparation
- Demonstration/Proposal
- Gain Agreement

Delivering
- Project Plan/Kickoff
- Conversion Implementation
- Customer Service
Sales Process Mapping: Best Practices
Recasting the sales process from the customers’ perspective

Demand Generation
Find potential customers and help them become aware that we might be valuable to them.

Qualifying
Understand the customer’s business well enough to help their decision makers understand the business problems we could solve for them.

Proposing
Understand the customer’s application requirements well enough to credibly demonstrate our solution is best for their needs.

Delivering
Help the customer achieve the business results they expect through our products and services.
Sales Process Mapping: Best Practices

This process does not specify measurable results.

Customer Focus
Process developed as part of a sales training course.

- Understand the customer's objectives and strategies
- Understand the customer's market and channel from the customer's and the company's perspective
- Gather and analyze publicly available data on the customer
- Listen and seek to understand the customer through dialogue and observation
- Engage and nurture the relationship network

- Identify opportunities to create value based on customer needs
- Test and validate opportunities with relationship network
- Jointly select the best solution with the customer

- Plan with the customer
- Define and implement customer and system resources
- Use your relationship network
- Facilitate decision-making
- Confirm joint commitments

- Earn the relationship

Focus on the Customer
Identify Account Potentials
Research Needs
Customer
Gain Commitment
Plan to
Gain Commitment
Implement Solutions
Customer
Sales Process Mapping: Best Practices

Broad metrics assess each goal-driven sales process phase

- **Assessment Metrics**
  - Suspect Volume
  - Press Exposure
  - Account Assessment Opportunities
  - Agreements: Dollars, Type, Value
  - Customer Satisfaction
  - Repeat Business
  - Relationship Assessment

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Sales Process Mapping: Best Practices

Link support tools, skills, and competencies to sales process

Performance Support Tools

- Account assessment criteria
- Data sources
- Account planning templates and software
- Contact, account knowledge, or activity management
- Presentation templates
- Examples of business value
- Follow-up letters

Skills and Competencies

- Assessing the account/opportunity
- Qualifying the account/opportunity
- Gathering and utilizing data
- Gaining the right level of account knowledge
- Developing/executing and account/opportunity plan
- Conducting an effective sales call
- Identifying decision-makers, sources of influence
- Developing a coach network
- Identifying product fit vs business fit
- Dealing effectively with gatekeepers
- Gaining access to decision makers
- Assessing the account/opportunity
- Qualifying the account/opportunity
- Leveraging relationships/knowledge
- Closing – on action steps and opportunities
- Communicating internally
# Sales Process Mapping: Best Practices

## CRM Realities

<table>
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<th>Assumption</th>
<th>Reality</th>
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<tr>
<td>CRM systems provide management with information for better “control” of field activities</td>
<td>Why would salespeople supply information to a system that can and will be used against them?</td>
</tr>
<tr>
<td>CRM suppliers know how to make a sales process work.</td>
<td>Most CRM systems only track activities; they are poor at helping people sell.</td>
</tr>
<tr>
<td>The supplier’s sales process model is fine for our business.</td>
<td>The supplier’s sales process model may be inappropriate for our business.</td>
</tr>
<tr>
<td>We can always make system changes later to fit our business better.</td>
<td>After the system has lost credibility and support in the organization, who cares?</td>
</tr>
</tbody>
</table>
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The Sales Management Association

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Consider joining The Sales Management Association, the premier professional association for sales leaders, sales support professionals, and sales force effectiveness thought leaders.
Michael J. Webb, author of “Sales and Marketing the Six Sigma Way” (Kaplan, 2006), is the foremost expert on sales process improvement. His firm, Sales Performance Consultants, Inc., helps senior executives committed to making their sales funnels flow faster.

Sales Performance Consultants’ unique approach aligns marketers and sellers to solve problems for customers - resulting in faster deal flow, higher margins, reduced cost of sales, and much improved sales forecast accuracy. Clients include Fortune 500 and smaller companies (such as ThermoFisher Scientific, MAQUET, WaterFurnace Industries, Replicon Inc., and many others).

Sales Performance Consultants’ website is accessible here: [www.salesperformance.com](http://www.salesperformance.com).

Mr. Webb can be reached by phone at +1 (770) 582-1189 or [mwebb@salesperformance.com](mailto:mwebb@salesperformance.com).
About The Sales Management Association

The Sales Management Association is a global professional association focused on sales management’s unique business and career issues. The Sales Management Association fosters a community of interest among sales force effectiveness thought leaders, consultants, academics, and sales management practitioners across many industries.

Through training workshops, online resources, and research materials, The Sales Management Association addresses the management issues of greatest concern to practicing sales managers. The Sales Management Association’s focus areas include management leadership, sales force performance coaching, sales planning, sales process management, enabling technologies, incentive compensation, and sales force support.

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