

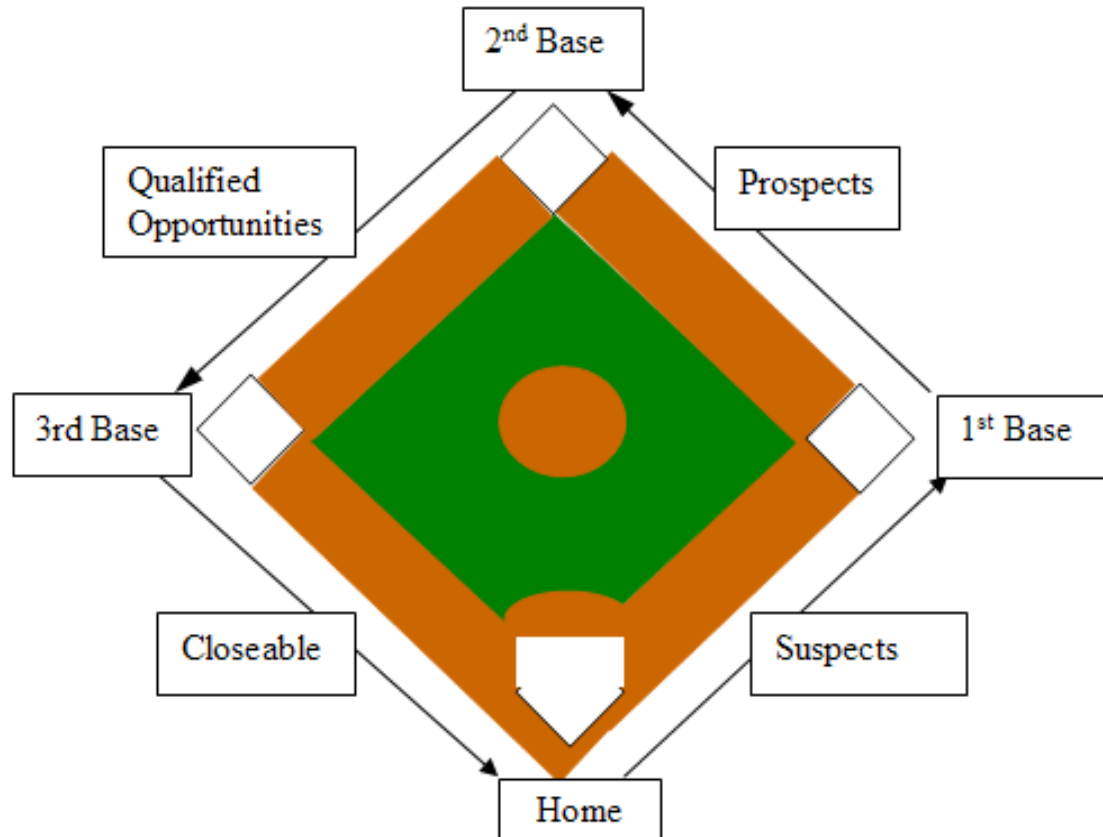


David Kurlan & Associates, Inc.
Sales Development Specialists

Applying The Sales Process

*Defining And Documenting A
Structured Sales Process*

The Baseball Diamond



Ready To Hit - Refresher

- **You're at Bat when:**
 - You have a targeted list of people who buy (or probably buy) your products
 - You have a referral.
 - You have a web site or other lead.

 - Once you have any of the above, you're on the Suspect base path

First Base - Refresher

- **You've introduced yourself using Positioning Statements**
 - “Hi, Bob it's Chris Mott
 - We help “title” who are “emotional word” about “positioning statement”
 - Slip and fall problems in your stores, maintenance concerns, brand image issues
 - Are those problems for you?
 - **In this initial conversation, you've**
 - Identified a symptom or two
 - Helped them realize it's important for them to spend additional time looking at ways to solve the problems
 - **You've set up a meeting and set expectations for the meeting**
 - Time
 - Agenda issues
 - Attendees
 - Possible outcomes
 - Homework to get ready for the meeting
- Once you have all of the above, you're on the **Prospect** base path

Second Base - Refresher

- You have established SOB quality
 - Note that you need SOB quality before urgency
 - You need them to see you as someone who can help them
- You know the prospect needs what we have
- There's urgency with the prospect
 - Once you have all of the above, you are on the **Qualified Prospect** base path

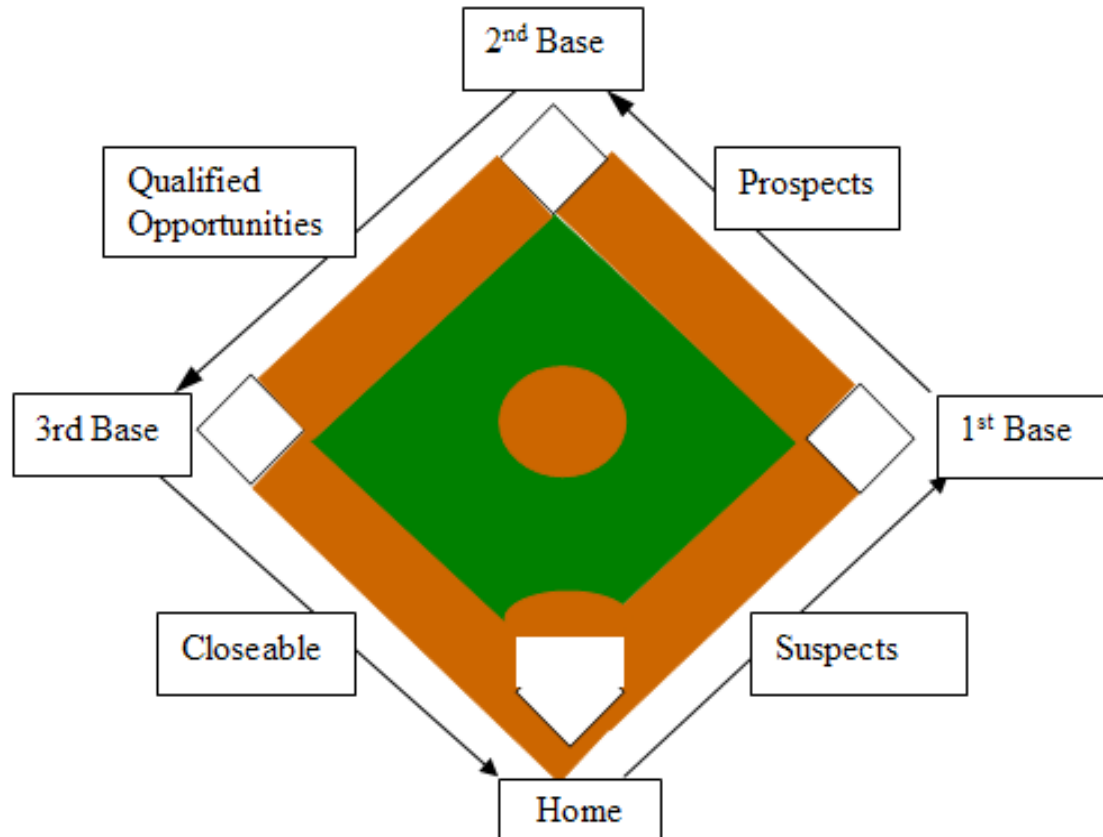
Third Base - Refresher

- You've established SOB quality and Urgency
 - When you're on second, the prospect is going to do something about their problem, but not necessarily with you
 - Getting to third base is all about qualifying
 - You must do EVERY qualification necessary before you close
 - Qualification points include
 - There is commitment on their part to fix the problem
 - You know who the decision makers and have meet them
 - You know how the decision will be made
 - There is a clear decision date
 - They have the ability and willingness to spend the money
 - They will change vendors, they want your help
- Once you have all of the above, you're on the **Closeable Prospect** base path

Running Home - Refresher

- You tell them only what they need to hear to solve their problem within their budget and make a decision
 - You've already touched all the other bases
 - Don't over complicate it
 - Restate the problems and "pitch" the reasons they should hire you
- When done right you will close and score, and then it's on to the next suspect

Mapping Your Sales Process To The Baseball Diamond



Primary Questions

- How many sales calls are needed in an ideal process?
- What needs to be accomplished during each call?
- What are the desired outcomes for each call?
- How long should each meeting last?
- Which decision makers need to attend?
- Which of your team members need to be involved?
- What should their role be?
- What company or division specific milestones must occur in the process?
- What is the ideal time line from home plate to home plate?

Company Specific Events

- **Along the base paths there are events or activities that are specific to your company or marketplace**
 - Providing samples with agreement for what happens after you provide them
 - Testing applications with criteria for what occurs after you conduct the test
 - References with a clear understanding of what happens after you provide them

Anatomy Of The Sales Call

- Your desired outcome
- Mutual expectations agreed to in advance
 - Time
 - Discussion points
 - Pre-call data gathering or preparation
 - Who will attend and why
 - Acceptable outcomes
- Restate expectations at beginning of call
- Execute the call
- Agree on achieved outcomes and set expectations for the next step in the process

Sales Tool Box Checklist

- Posturing techniques documented
 - Bonding and rapport in the prospects world
 - Clear value proposition
- Written positioning statements
- SOB quality defined
 - Partner, consultant or advisor relationship
- Urgency defined
 - Documented potential problems and consequences
- Create the 2nd to 3rd base qualification checklist
- Develop a proposal template with ROI section

Workspace
1 2 3 H
Edit Progress
Prev Next

Sales Process Session

 WBJ Sales Summit

- Sales Process
- Interactions
- Contacts
- Sales Team
- References
- Products
- Profile
- iO

★ [Make this my default page](#)

[Show Selling Resources](#)

<input type="checkbox"/> 1st Base	<input type="checkbox"/> 2nd Base	<input type="checkbox"/> 3rd Base	<input type="checkbox"/> Home
<input type="checkbox"/> Engage (due: 08/01/2008)	<input type="checkbox"/> Need	<input type="checkbox"/> Commitment	<input type="checkbox"/> Proposal
<input type="checkbox"/> Identify Issue[s]	<input type="checkbox"/> Compelling Reasons	<input type="checkbox"/> Able to Spend the Money	<input type="checkbox"/> Contract Signed
<input type="checkbox"/> Schedule Appointment	<input type="checkbox"/> Relationship	<input type="checkbox"/> With the Decision Maker	<input type="checkbox"/> Deposit Received
<input type="checkbox"/> Confirm Meeting	<input type="checkbox"/> Rule of Ratios	<input type="checkbox"/> Competition Identified	<input type="checkbox"/> Received Org Chart/Names
<input type="checkbox"/> Send Appropriate Collateral	<input type="checkbox"/> SOB Quality	<input type="checkbox"/> Qualified	
<input type="checkbox"/> Conduct Meeting		<input type="checkbox"/> Presentation	
		<input type="checkbox"/> Closable	

Summary

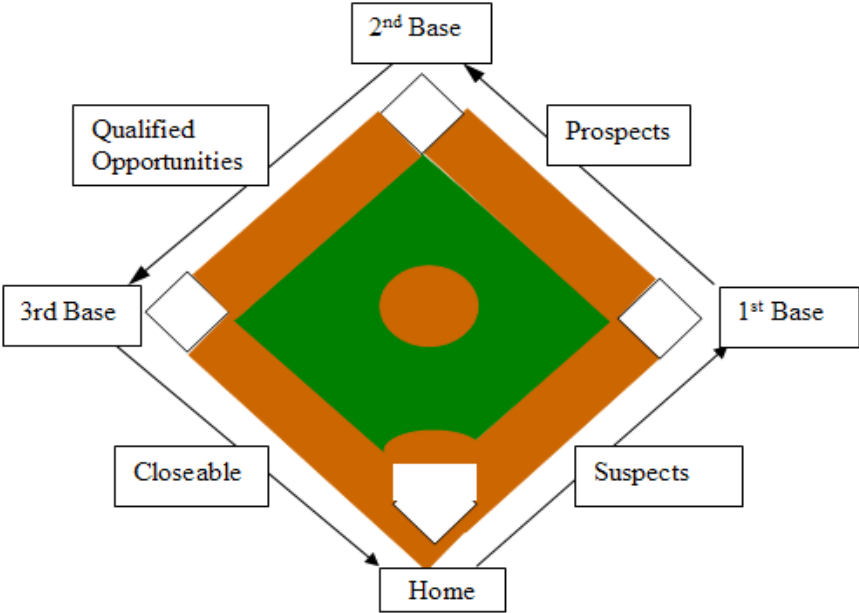
Owner: **Rick Roberge**
 Forecast Close: 08/28/08
 Status: **Active** [change](#)
 Start Date: 07/28/08
[Edit/View Details](#)
[Delete Opportunity](#)

Next Steps and Alerts

- Engage
 (due: 08/01/2008)
- No upcoming task
- No upcoming event
- 0 document(s) uploaded,
 0 comment(s) posted,
 0 document(s) downloaded
[View Activity History](#)

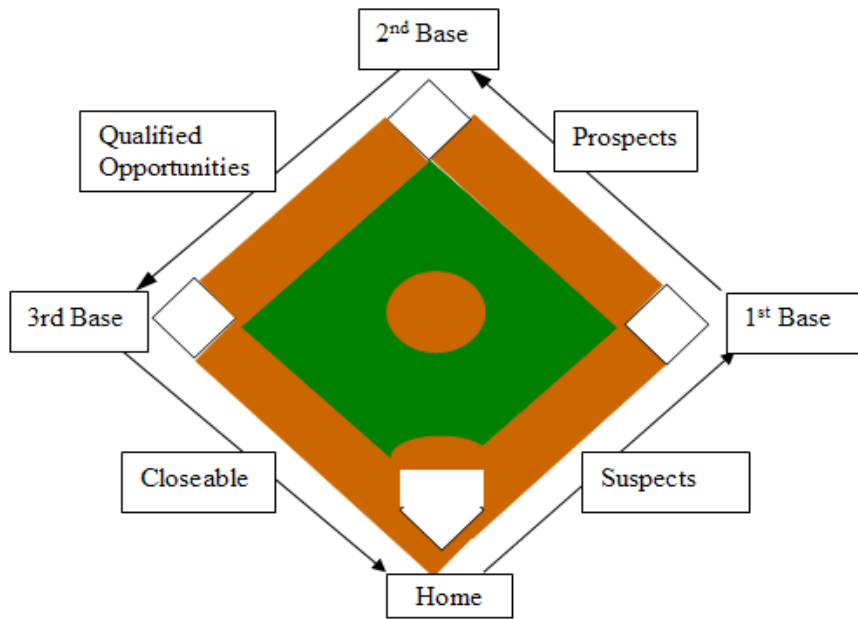
Landslide Explorer (click to expand)

First To Second In Your World



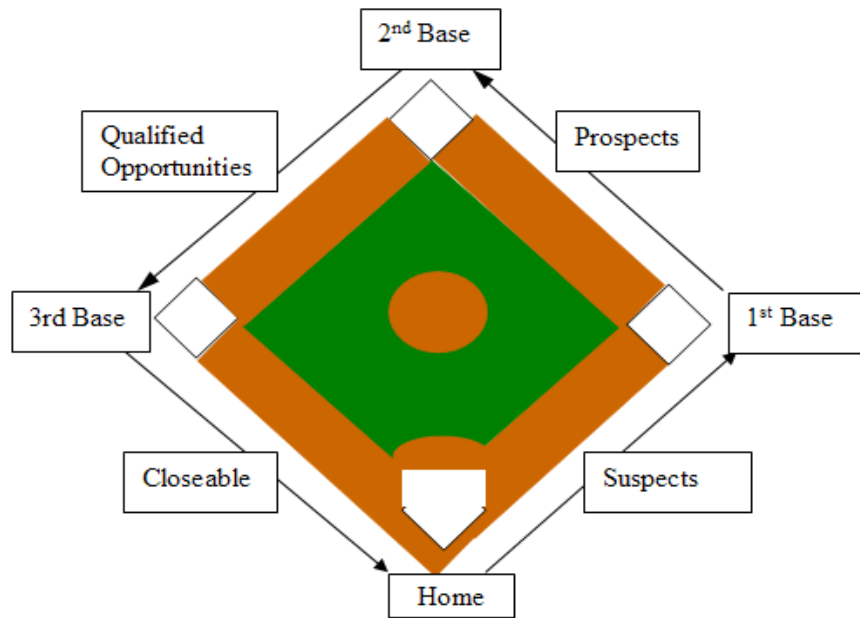
- Number of calls
- Goals for the call
- Expectations
- Outcomes
- Who attends
- Your team
- Their role
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Second To Third In Your World



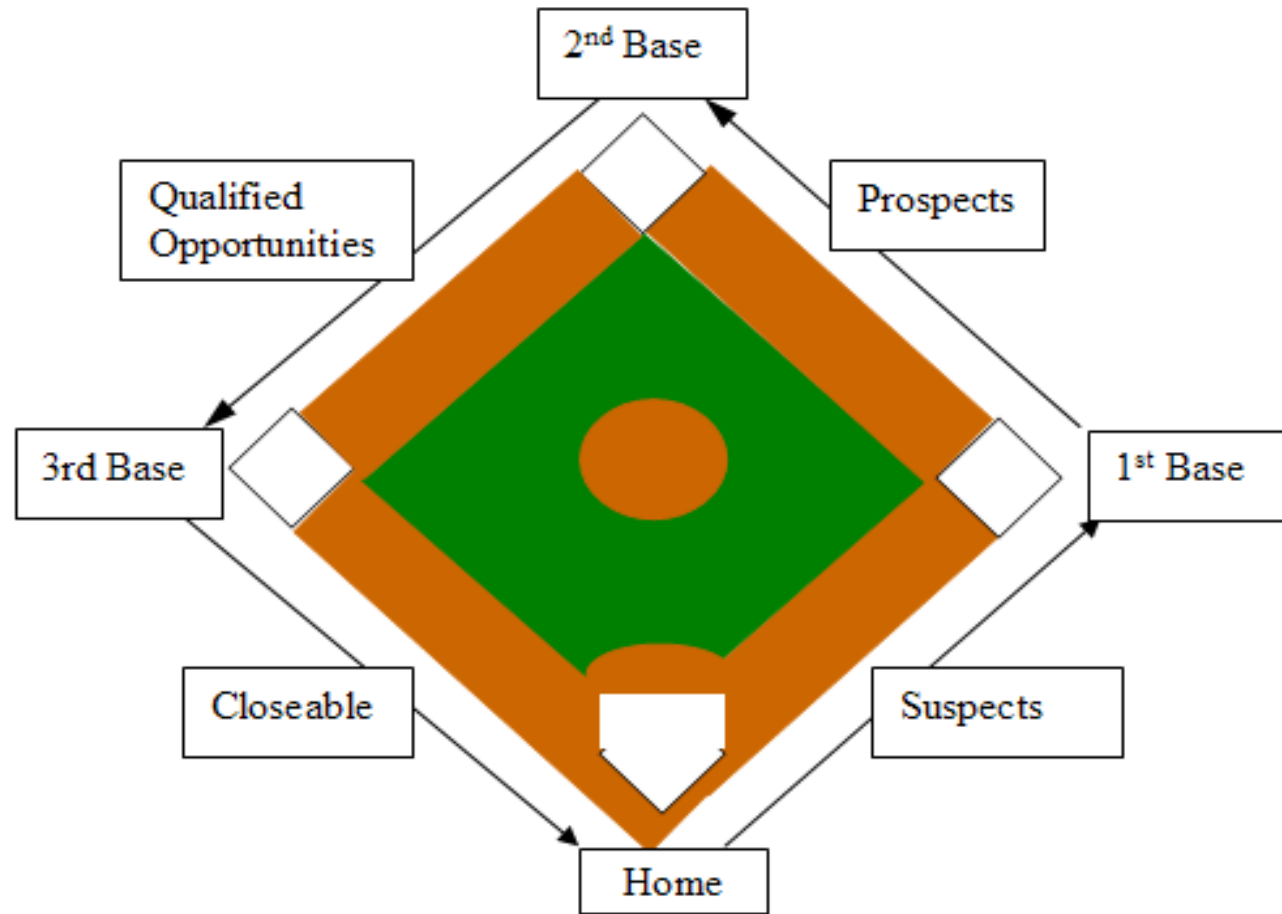
- Number of calls
- Goals for the call
- Expectations
- Outcomes
- Who attends
- Your team
- Their role
-
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Third To Home In Your World



- Number of calls
- Goals for the call
- Expectations
- Outcomes
- Who attends
- Your team
- Their role
-
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-

The Final Picture





David Kurlan & Associates, Inc.
Sales Development Specialists

Rick Roberge

The Rainmaker Maker

114 Turnpike Road

Suite 102

Westborough, MA 01581

508.389.9350 ext. 223

rroberge@salesdevelopmentspecialists.com