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| Training Document |
| The Sales Process |
| John Smith |

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# Introduction

We speak about sales in terms of cycles to help us organize our activities and keep focused. Here is a look at the basic sales cycle:

Figure 1

The basic steps are:

## Initiate

Find new opportunities and establish relationships that focus on identifying and solving client needs. These relationships can evolve in many ways.

## Build

Convert those opportunities into clients by building trust and credibility.

## Manage

Manage the relationship and focus on serving your customers by offering solutions, resolving problems, meeting their needs, getting their agreement to buy.

## Optimize

Grow the relationship with consistent results and problem solving. This is the time to set up long term relationships through additional problem solving, business building, and referrals.

# Step One: Build

Once you meet your client, you begin building your relationship with them. These relationships are based on trust. As you build the relationship, you will investigate your potential client’s problems, get a solid understanding of their situation, pre-qualify them as a buyer, and consider how you will make your presentation to them in a dynamic way. Remember that your presentation has to appeal to them from their point of view, and that customer focused selling is a consultative process.

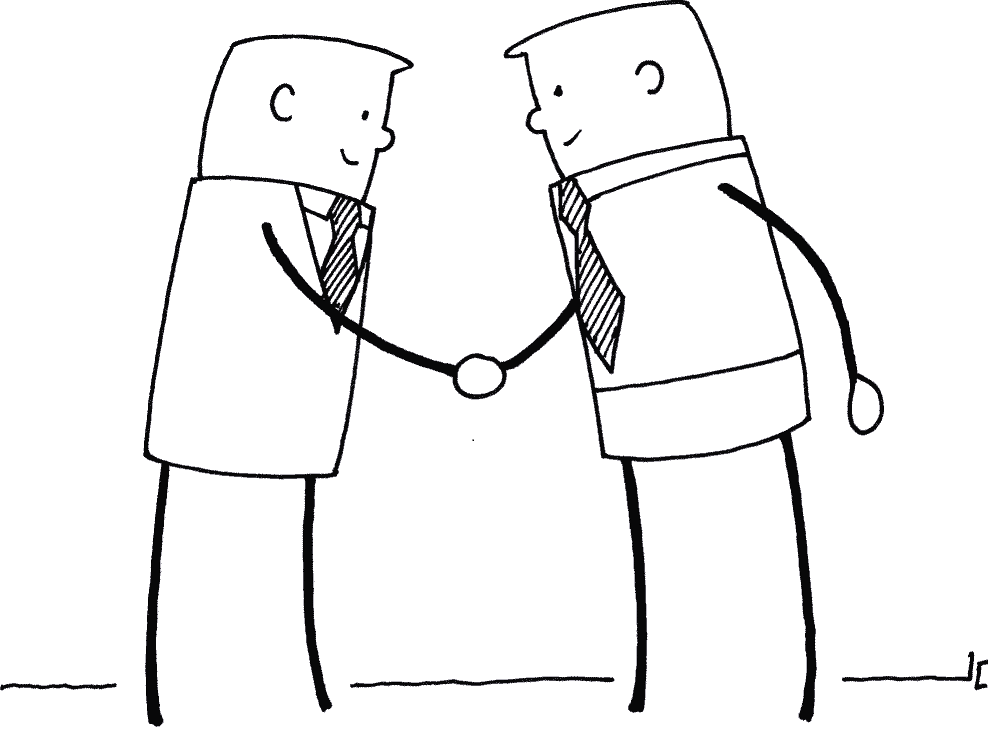


Figure 2

# Step Two: Manage

You can manage relationships and focus on serving your customers by offering solutions, resolving problems, meeting their needs, and then getting their agreement to buy. In this part of the sales cycle, you will make your presentation, considering all aspect of your client’s needs and the benefits of your solution. You will also ask them to make a buying decision and work through any objections that they have.

Another thing that a sales professional must work with is what makes their company, product, and/or service unique. This is called your Unique Selling Point (or Position) – the USP for short. Make sure that you can answer your prospects question when they ask why you are in the best position to provide this solution.

Our customers are experiencing information overload much of the time, so the amount of attention that they will give you is limited. If you send them a written proposal, expect that they will scan it very quickly. This means that your headings and text need to be short and to the point. During an in person or telephone presentation, watch and listen for cues that you have their attention and are answering their questions. Adjust your approach as necessary to keep them engaged.

# Step Three: Optimize

Grow the relationship with consistent results and problem solving. This is the time to set up long term relationships through additional problem solving, business building, and referrals. When you consider this aspect of the sales cycle, this is also the aspect you will use to help top up your pipeline. Even if your prospect says “no,” that does not mean that they will never do business with you, or that they don’t trust you. Sometimes it means that they need more time to consider your offer, or that there is some very real barrier they have to deal with. Instead of thinking that “no” is the end of your relationship, you can continue to build the relationship. For example, you can ask the client for referrals – they will often give them to you.

The other aspect to consider at this stage of the sales cycle is to consider whether there are other opportunities to work with the same organization. Can you build on the relationship that you have developed and help other departments, locations, and people within the same company? If you have not been introduced to those opportunities through the sales cycle, ask.

The final phase of optimizing is to evaluate what you have done throughout this sale. What have you learned? What can you do better or differently next time in order to reach a more successful result?

Figure 3

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