

## Process Steps for Sales to Small Businesses

Sales Process Steps	Phase 1 Prospecting	Phase 2 Qualifying	Phase 3 Proposal	Phase 4 Decision	Phase 5 Repeat Business
<b>ACTIVITIES AND MILESTONES</b>	Generate new prospects (via referrals, networking, trade associations, conferences)  Look at existing customer base for opportunities  Identify decision-maker within target company	Probe and assess needs with decision-maker  Create a buying vision that maps product/service to business needs  Assess potential, including revenue forecast and internal dependencies	Create an evaluation plan to demonstrate to decision-maker your ability to meet their business goals  Ask for the business  Issue the proposal	Negotiate terms and conditions  Close the sale	Complete the work (deliver the product/service)  Follow-up with the customer
<b>OUTCOMES/GOALS</b>	<b>Initial sponsor identified</b>	<b>Buying vision and access to decision-maker</b>	<b>Value demonstrated and proposal submitted</b>	<b>Signed contract</b>	<b>Satisfied customer (repeat business, reference)</b>
<b>JOB AIDS</b>	Business development prompter  Customer reference story  Selling points presentation  Competitive points list	Product/service benefit statement  Follow-up to product/service sales call (formal)  Follow-up to product/service sales call (informal)	Product/service evaluation plan	Rebuttals to negotiation roadblocks  Give-get list for negotiation tradeoffs  Negotiation tracker	Product/service satisfaction tracker  Sale follow-up letter
<b>CUSTOMER BUYING PROCESS</b>	Identify business needs	Determine requirements	Evaluate options	Negotiate	Implement and evaluate success