

Process Steps for Sales to Medium and Large Businesses

Sales Process Steps	Phase 1 Prospecting	Phase 2 Qualifying	Phase 3 Proposal	Phase 4 Decision	Phase 5 Repeat Business
ACTIVITES AND MILESTONES	Generate new prospects (via referrals, networking, trade associations, conferences) Look at existing customer base for opportunities Identify initial sponsor/ally within target company	Probe and assess needs with prospect/customer Create a buying vision that maps product/service to business needs Deliver proof to sponsor that needs can be met	Evaluation plan to demonstrate to decision-maker your ability to meet their business needs Assess potential (revenue forecast, internal dependencies) 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
OUTCOMES/GOALS	Initial sponsor identified	Buying vision and access to decision-maker	Value demonstrated and proposal submitted	Signed contract	Satisfied customer (repeat business, reference)
JOB AIDS	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 Value analysis calculator for product/service	Rebuttals to negotiation roadblocks Give-get list for negotiation tradeoffs Negotiation tracker	Product/service satisfaction tracker Sale follow-up letter
CUSTOMER BUYING PROCESS	Identify business needs	Determine requirements	Evaluate options	Negotiate	Implement and evaluate success