

# The Sales Process — Our Common Language

It doesn't matter how talented your sales team is or how hard you work.

Without a roadmap for success, you're making your life a lot harder than it needs to be.

A sales process is a set of repeatable steps that helps your sales team convert a prospect into a customer.

Having a standardized sales process adds structure and accountability to your sales activities, leading to a higher win rate and shorter sales cycles.

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## 8 Reasons Why You Need One:

- 1. Have a clear path for sales reps to follow** —  
better than winging it.
- 2. Faster onboarding** — simple and nearly foolproof while taking some burden off the sales manager.
- 3. The ability to continually refine winning sales methods** — knowing why you are winning or not.
- 4. Predictability of sales revenue** — more reliable forecasts with data driven close ratios.
- 5. Be better at qualifying leads** — more effective in helping identify high potential, life long customers.
- 6. Common language and process** — simplifies communication and collaboration
- 7. Greater insight to sales effectiveness** — reveals impact of sales decisions along the sales process.
- 8. A better overall customer experience** — align with how the customer wants to buy not how you want to sell.

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ISA SalesWerks Deal Stages ensure alignment with the end customer, increasing probability of success.

## 1 Qualified Opportunity

A qualified opportunity fits within your organization's core strengths, resources and go market strategy. Once you have confirmed that the opportunity is a good match, you will move the lead into the "Qualified Opportunity" stage. This will allow you to have clarity between what is just a lead and an opportunity that is qualified to move the sales process

## 2 Presentation

The "Presentation" stage is where you convey **relevance** and **capability** - demonstrating to the prospect that you are a serious contender for the opportunity. This stage is often the starting point for tracking potential revenue from a deal.

## 3 Assessment

After completing a thorough presentation and the prospect has agreed to move forward in the process, you will move them into the "Assessment" stage. This stage is about **discovery** and **clarity**, learning what the prospect is doing today, what is working, and understanding the goals they want to achieve.

## 4 Validation

The "**Validation**" stage is designed for **agreement** and **alignment**. This takes the Assessment stage to the next level, where you are validating their current state, gaining a deeper knowledge of their pain points, understanding their needs and future state objectives. This is your time to start bridging any gaps they have and further demonstrate that you are the right solution.

## 5 Test/Design

The Test/Design stage is where you design a solution that **bridges the gap** between the customers current and desired future state with dollarized value and ROI.

## 6 Proposal

"Proposal" is your **competence** and **assurance** stage. This is the stage where you are making it abundantly clear that you can and will deliver them a solution that meets their needs and will be a low risk decision.

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## 7 Negotiations

It's now time for the "Negotiations" stage, where the customer will make the **value** and **ROI connection**. Work with the customer to secure the right solution at the right price and timeline that works for all parties.

## 8 Won

Great job! Now go and serve your new customer. Make sure to track the reason why you are winning deals, what worked, what can be used again, where was there friction that you can iron out in the future and how you can duplicate this success.

## 8 Lost

Losing a deal can be one of the best tools for future growth. In PipelineDeals you can track your lost reasons as well. Make it mandatory to give a reason why a deal is lost. Each month review your won and lost deals so that you can better understand what pivots are necessary in your process or business to lose less and win more.



### PIPELINEDEALS TIP

When your PipelineDeals trial account is created, we will add these custom ISA SalesWerks deal stages for you