

Get Organized

SALES PROCESS WORKSHEET

A sales process is a set of repeatable steps that your sales team follows to convert prospects into customers. Use this worksheet to define your sales efforts and build a roadmap for your success.

INSTRUCTIONS

- 1 Write down the key buyer activities, milestones, and decisions that **need to take place** through the course of every sale.
- 2 Choose a series of **sales stages** to support that buying process—between 3–7, depending on the complexity of the sale. Typical stage names include:
 - Prospect
 - Make Contact
 - Qualify
 - Research
 - Pitch
 - Propose
 - Get Signature
 - Close
 - Check-In
 - Upsell

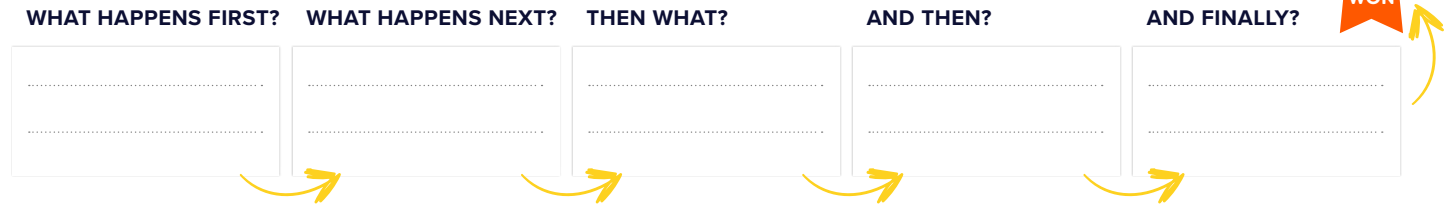
Note: Each stage should have a **goal** that reps must complete before the lead moves forward. What's the specific action or agreement that must be reached in each stage?

- 3 For each stage, **list the tasks** that your sales team must complete to accomplish the stage goal. Some typical tasks include:
 - Call new lead
 - Prepare for meeting
 - Conduct web demo
 - Fill out proposal

Optional: Do you assign leads to your sales reps based on territory, product line, value, or other criteria? **Think about the rules** you currently use to distribute each new lead to the rep who's most likely to close it. (You can automate these rules in Nutshell.)

Pro Indicates a feature only available in Nutshell Pro

Your Customer's Buying Process



Your Sales Stages (aka Your Pipeline)

* To add pipeline stages, lead assignments, goals, tasks, and automated email sequences in Nutshell, go to your [Sales Automation](#) page

WHO DOES THIS?	WHO DOES THIS?	WHO DOES THIS?	WHO DOES THIS?	WHO DOES THIS?
STAGE GOAL <small>Pro</small>	STAGE GOAL <small>Pro</small>	STAGE GOAL <small>Pro</small>	STAGE GOAL <small>Pro</small>	STAGE GOAL <small>Pro</small>
TASKS <small>Pro</small>	TASKS <small>Pro</small>	TASKS <small>Pro</small>	TASKS <small>Pro</small>	TASKS <small>Pro</small>