

## Tools and templates



### Streamlining your sales process

Does your sales process run as smoothly as you'd like? There are a number of easy ways you can streamline the process and prevent easy sales from slipping through the cracks.

Here are four steps to get you thinking about your sales process.

#### 1. Define your ideal customer

Are you trying to be everything to everyone? Having a wide range of customers has its benefits, but it's not easy to develop a sales process that fits wildly different customer needs. Focus on targeting one type of customer, or customer need, at a time.

- Do you have a description of your ideal customer?
- Can your team easily access and use this information?
- Are your sales and marketing team clear on who they should be targeting?

#### 2. Assess your current process

Whether you're selling to customers over the phone, through a website or in a store, it's important that every step fits together and your team understands the process.

- How do you work out the value of potential leads?
- What type of meeting or action would you expect at each stage of the buying process?
- Do you understand what drives purchasing decisions?
- What supporting material could you use to help customers through the buying journey?
- What's your follow-up process once the sale has been completed?

#### 3. Document each step

Documenting the steps you take is one of the easiest ways to streamline your process. Recording what works – and what doesn't – enables you to keep learning and improving.

- Do you have a document that outlines information to give at each stage, plus what to share before and after you've talked to a potential customer?
- Have you defined questions to ask or stories to tell, and when it is best to do so?
- If you're selling online, do you know which stage customers tend to drop out of the process and how best to re-engage them?
- Do you know the biggest selling point of your product or service for each type of customer?

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### 4. Make use of technology

Manual activities are time consuming, lead to a higher risk of error and can slow your sales process down. Explore technology options to see what could help.

- Use a customer relationship management (CRM) tool to organise leads and track the progress of potential customers through the sales cycle
- Build email templates based on past emails that have the highest open and click rates
- Implement Google Analytics to track how users work through your sales funnel online
- Online calendar tools like Calendly allow you to share free time slots with potential customers, cutting down on the back and forth to set up meetings
- Use sites like Tripadvisor or Trustpilot to help build trust in your product or service