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**SALES PROCESS MAP WORKSHEET**

This worksheet will guide you through mapping your sales process, identifying the key stages, and analyzing performance at each stage. Use this tool to streamline and optimize your sales strategy.

# STEP 1: DEFINE YOUR SALES STAGES

## Prospecting

* 1. How do you find potential customers? Channels used (e.g., social media, cold calling, walk-ins).

## Lead Qualification

* 1. What criteria do you use to qualify leads? Process (manual, automated, hybrid).

## Initial Contact

* 1. How do you initiate contact with leads? Methods (e.g., email, phone call).

## Needs Assessment/Discovery

* 1. What questions do you ask to understand customer needs? Techniques for personalization.

## Presentation/Demo

* 1. How do you present your product/service? Formats (e.g., presentation, demo).

## Proposal

* 1. How do you present the solution? Information included (e.g., pricing, value).

## Negotiation

* 1. What are the common objections? How do you handle pricing/feature negotiations?

## Closing

* 1. How do you close deals? Common closing techniques (e.g., urgency, incentive).

## Follow-Up/Retention

* 1. What are your post-sale follow-up processes? Customer retention strategies.

# STEP 2: MAP YOUR PROCESS FLOW

Use the table below to map your sales process. Start with Prospecting and end with Closing.

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| --- | --- | --- | --- | --- |
| **Sales Stage** | **Action** | **Tools/Methods Used** | **Time Taken (avg)** | **Success Rate (%)** |
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# STEP 3: ANALYZE KEY METRICS

1. **Conversion Rates -** Track the percentage of leads that move from one stage to the next.
2. **Sales Cycle Length -** How long does it take to move a lead from Prospecting to Closing?
3. **Drop-Off Points -** Identify where leads drop off the most, and brainstorm solutions.
4. **Sales Performance Goals -**  Set specific goals for each stage of the process.

# STEP 4: ACTION PLAN

**Key Insights**

Write down the areas of improvement you discovered in your sales process. What stages need the most attention?

**Action Step**

Define 3-5 actionable steps to optimize your sales process (e.g., streamline lead qualification, reduce negotiation time).

# STEP 5: REVIEW AND REFINE

Regularly revisit this worksheet to adjust your sales process based on performance data and customer feedback.

Need help optimizing your sales process? Visit our website for more resources and expert support!