**What is a Sales Process?**

The term “sales process” is casually and often, wrongly used to describe how a person or organization goes about selling products or services.

Here is the Dictionary definition of process: “a systematic series of actions directed to some end’. The “some end” in our case is a sale but what are those systematic actions? Who defines them and how systematic are they really? Do all of your sales people really follow the process and what difference does it make?

Many companies will describe a sales process without defining what the actions are or they include every single action that might take place.

Furthermore, a Sales Process is not a methodology – the how to sell. There are several excellent sales methodologies (Miller/Heiman, Solution Selling, Sandler, etc.) and these need to fit within a company’s Sales Process.

**Why does it matter?**

A well implemented Sales Process provides a number of significant benefits to an organization:

* Much better revenue predictability
* Faster ramp up of new sales people
* More productive sales and marketing functions
* Higher customer satisfaction – consistent communication of the offering and smoother transition to product/service delivery
* Higher sales win rates
* Better insight to who, when and why for improving sales effectiveness

The challenges most organizations face are:

* How to document and agree on what it is
* If/How it aligns with the company strategy and marketing function
* How to get the sales team to embrace the process – what is in it for them
* How to keep it simple and lean
* If/How does it mesh with the current or future CRM system

**Where are you now?**

It may be helpful to assess where your company currently stands. Here are four levels as described by Brian Christiansen at “Milestone Selling”:

* Level 1 – Anarchy & Luck – Each salesperson has their own process; Results are unpredictable
* Level 2 – Hope and Intention – Have a sales process, hope it is used but no supervision of results

There is a process that has been defined but whether it is correct or effective is not possible to know as there is no management oversight. Does the organization agree on the definitions of each stage of the process? Is this consistently adopted and reinforced within the sales team? Are all the sales team members following the process? Is there an understanding of what the results for each stage, by sales person? How consistent are the results by stage? What is the variation among sales people? Does management use this information to train and develop each member of the sales team?

* Level 3 – Controls & Errors – Have a process and the use is supervised; Use to identify errors in retrospect.

Management and some sales team members understand, internalize and follow the chosen process. The metrics are consistently reported and reviewed: management uses the metrics in business planning and monthly reviews. Many sales people know their specific metrics and adjust their work focus accordingly. Sales Management uses individual sales team results to focus remedial activity on lagging performance.

* Level 4 – Dynamic Process – Have a sales process that sales people are motivated to follow. Monitored dynamically and used constructively

**Elements of a Sales Process**

* Aligns with the buyer’s process
* Guides the sales person through a sales cycle
* Provides a framework without constricting sales creativity
* Auditable Milestones at key points
* Supports an ability to capture key metrics
* Equally applicable to new and experienced sales team members

Although most buyers do not have or know they have a buying process, experienced sales people can describe what their prospects will do to finally reach a sale. It is critical to define the ideal buyer’s process so your sales process will be aligned.

In most sales organizations, there are a few “star” salespeople who in many cases have either developed their own sales process or brought along a previous employer’s. The sale’s leaders challenge is to translate and enhance this insight into a standard so all sales people can adopt and excel faster.

There will be many tasks a salesperson must do within the typical sales cycle and it is useful to create the complete list. However, a major step in defining your company’s Sales Process is to identify the main Milestones. Milestones should require an action on the buyer’s part and be auditable. For example, notification of vendor selection to all bidders, even if it may be weeks from a formal contract, is proof of a typical milestone achievement.

The focus on Milestones will allow for capturing key metrics, establish an accurate pipeline and motivate a sales person to reach their goals. This is particularly true with long, complex sales cycles.

**Actions to take now**

As the sales leader, consider doing the following

* Assess your current sales process competency level,
* Document your buyers process,
* Revise/Create a flow chart of main sales stages for your company
* Identify the Milestones within the process
* Focus your tracking through the CRM system on Milestone achievement
* Benchmark all sales people by Milestone stage achievement
* Focus your training on the appropriate sales people based on Milestone results
* During your regular sales reviews audit the Milestone integrity of your staff

**Summary**

A well-defined and implemented sales process is critical to the sales organization’s ability to meet their goals and provide consistently accurate sales projections to senior management. Tracking the key process metrics will provide insights as well to the sales leadership and the actions required to improve the sales team.

For more information on “Milestone Selling” go here [www.milestoneselling.com/](http://www.milestoneselling.com/)

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