

Module 3

Lesson 5: Design Your Sales Process

Hey guys! Welcome back to module 3, lesson 5. So now we're going to look at starting to design your sales process and how to do it. A lot of people come to us and say 'I'm not really sure where to start with designing my sales process. I'm not really sure how to do it. Well I've got a 3-step, an easy 3-step formula that you can use to map your sales process and make it really clear.

1. We'll start with number 1 - we want to look at what you're doing on a daily basis to sell already and we're going to be mapping those little steps and putting them into a larger sales processing later on. So we want to look at the different steps that are involved from the first contact you have with your customer through your sale and beyond. So starting to observe and taking notes is really important.
2. We want to map those steps together. So get it down on paper and I'm going to show you some really handy technology you can use in a minute but mapping them down on paper, just writing them down so you know the steps that the customers are actually following through from 1 to 2 to 3 and so on. For example, you might have an inquiry, presale, pitch, close and nurture. That's 5 steps but it's easy to understand. You've got an inquiry phase, you've got a pre-sale phase, might be presenting a product or showing them around, you've got the pitch stage - where you're actually giving them a sales pitch, the close is actually when you close down the sale and nurturing or could be nurturing them after they have purchased from you.
3. And the 3rd step is probably the most fun, I think it's the most fun - which is the testing phase. So you're actually going to once you've observed and mapped out your sales process, you're actually going to put it to use. You're actually going to be testing it on clients that are coming through but you want to be able to use your sales process as a guide to see what step they're going through along the way.

I've got a great example of a sales process coming up and I'd really like you to take a look. So let's have a look at them now. So here you can see a really basic sales process example that you could potentially use in your business as well. It starts with an enquiry and it goes to the pre-sale, there's actually 2 steps in the pre-sale, there's the sales pitch or close stage, we've got a customer accepting a quote or declining a quote and I'll speak to you about the importance of those in a minute. We've got the sale itself, customer providing us with a testimonial and then the nurture phase from there.

So then let's start from the beginning, the customer first makes contact with you, you need to think about where your customers are making contact with you and how they're making contact with you. The second thing, the pre-sale or the second step sorry is the pre-sale is your capturing details. You're taking their enquiry, you're actually speaking with them and creating your report. The third step is also pre-sales step but it's where you're providing information or presenting information to them. We're going to cover off another lesson further on, but this is really important because this is where you're really showing how really good your products and services are, the benefits and how it's going to solve the needs of the client. The 4th step is the follow up step, this is where we are doing our sales pitch or are actually closing the sale. This is really important in the sales process example we've actually provided a quote so following up is really important where handling objections and questions they may have. The fifth step is where the customer's actually accepting the quote and a good case scenario he has accepted the quote and we're going on to sale. In a not so ideal world, the customer has declined our quote but that happens, that's the name and game of sales sometimes you win, sometimes you lose. The sixth step is the customer making the purchase so there's actually a sales step where actually making the transaction on this one. The seventh step is the customer provides us with a testimonial on how awesome our service was or how our products and services are. The eighth step is the nurture step, that's where the customer goes into a nurture cycle through the use of our CRM which we have spoken about in previous lessons. Once they go into here they are nurtured and looked after and we communicate with them on a weekly or a monthly basis after that.

So as I mentioned, we've got some great technology in store for you. I'd like to introduce you to a program called LucidChart, now you can build any flowchart with Lucidchart but it's great for building sales processes. It's really

easy to use, really simple to follow, uses a basic drag and drop kind of technology. It's a fantastic program build simple and complex sales processes simply, easily and really quickly so I do recommend it. Check it out LucidChart.

Now once you have created a sales process and started to test it then it's time to measure the effectiveness of it. Then we can track different metrics, there's plenty of metrics that we can track and here's just a few examples:

How many customers transitioned into and out of each stage in any given time or period. We can track how long your prospects are staying in a particular stages within the cycle. Are there places where we could speed up the process of the person staying within that step within the cycle? What can we do better to be converting every single step of the sales process and how can we nurture our customers in a better way? These metrics will help you identify and form strategies to become a little bit more effective and a lot more efficient in running your sales process operations. You will also know where your customer sits in your purchasing cycle.

So now it's your turn let's get into building your sales process use LucidChart and let's get cracking.

Some of the lesson takeaways today, we've got 4 of them:

4. Observe. It's all about your sales process. Observing your current sales or your past sales and see what the steps are within your current sales process.
5. We want to map them. We want to be looking at mapping these down to paper or using LucidChart to be able to build out a sales process we can look at.
6. We want to be able to test this and we only going to be able to test it by actually running our customers through the sales process ourselves
7. We want to be measuring the metrics and looking at how we can be more efficient and more effective within the sales process

And don't forget guys to fill out the google form that comes with this lesson and if you have any questions, please feel free to reach out to us at ask@nickpsaila.com or hit us up on our Facebook page.

I'd love to say a great congratulations for finishing this module and completing it so well done! We're really looking forward to seeing you on the next module so we'll see you all of that again very soon. Well done once again.