<COMPANY> SALES PROCESS

From Lead to Closed Won

LIMITLESS
GROWTH CONSULTING AGENCY

Anonymized

PORTFOLIO FYI

We're delighted you're reviewing our portfolio! A few FYI's to get the most from reviewing this project:

- Naming conventions, stages, sales strategy are all decided on in conjuction with <Company>. We're here to support, guide & educate, but ultimately, you will make the final call
- We're proficient in over 10 sales methodologies, and comfortable following those frameworks, or using the best parts of all of them to create a custom process that fits your company like a glove
- Many slides in this training deck were used as conversation starters during training, and may have missing context because of that

LIMITLESS
GROWTH CONSULTING AGENCY

CONCIERGE

Influencing someone make a decision for *their* desires and reasons

PERSUASION

Influencing someone make a decision for *your* desires and reasons

MANIPULATION

Influencing someone make a decision for *your* desires and reasons, but *pretending it's for them*

HOW DO LEADS GET INTO THE FUNNEL?

OUTBOUND

Go Find

- Engaged contact with cold outreach via email/ call/ social media, etc.
- Conferences
- Advertising in non-digital spaces (print, magazines, billboards etc.)
- One-way communication
- One to many
- Disruptive
- Seller initiates

Redacted Resource Links:

- Target AE Account Strategy
- Closed Lost Campaign Strategy
- Prospecting Model

INBOUND

Get Found

- Drive contact to a “hub” (website, etc.) to raise their hand
    - Digital Media
    - SEO/SERP
    - Blog
    - Social Media
- Referrals & Relationships
- One to one
- Conversational/ collaborative
- Prospect initiates
- Podcast

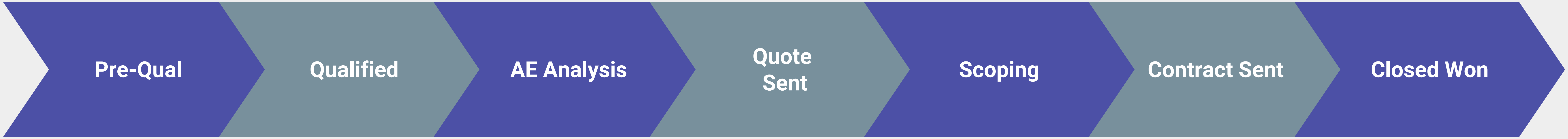
WHY IS LEAD SOURCE IMPORTANT?

Intent • Predicted Sales Cycle • Sales Strategy

1. Determines their willingness to engage, share information and collaborate
2. Determines where the prospect is in the buyer's journey
3. Should help inform your approach, style, and process
4. The captured data helps inform our ongoing marketing strategy

SALES PROCESS REVIEW

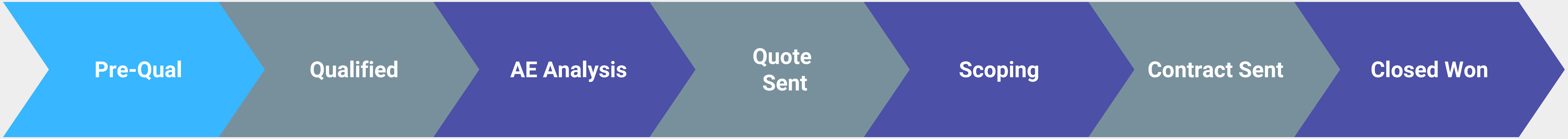
STAGES



PRE-QUALIFIED STAGE:

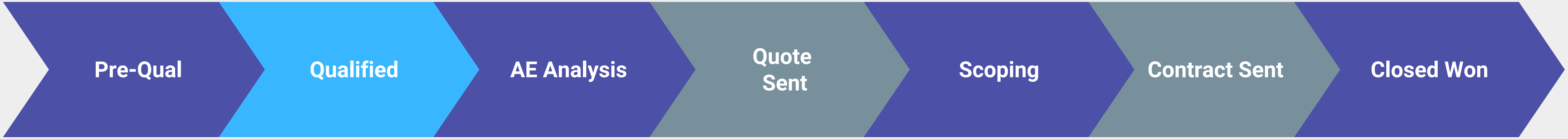
PURPOSE IS TO ENSURE WE'RE PROVIDING QUALITY LEADS TO SALES

- All SDR & Marketing Leads are created in "Pre-Qual" stage to serve as a holding bay until sales has their first interaction and determines quality
- Criteria to move to Qualified: Interested in solution, ready to start evaluation, timeline <6 months
- To accept a lead, move to "Qualified" stage & the qualified date will populate automatically
- To reject, move to "Closed Lost" from Pre-Qual, populate closed lost reasons & provide any additional details marketing should be aware of
- FYI: Sales self-generated leads skip Pre-Qual and are created in "Qualified" stage



QUALIFIED STAGE:
PURPOSE IS TO COMPLETE DISCOVERY AND ALIGN ON NEXT STEPS

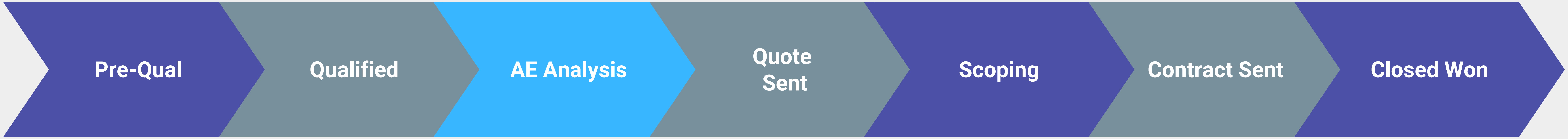
- Normally the first time the prospect is communicating with Sales
- This conversation is an opportunity to gather critical data : Discovery Workbook (redacted link)
- Aim to better understand status quo, problems/goals solving for, buying process, key players, timeline, budget, any other unique criteria, competitors they're considering, etc.
- Align on next steps, urgency, owners. Next step should be demo 99% of the time
- You now have criteria to enter your first forecast



AE ANALYSIS STAGE:

PURPOSE IS TO COMPLETE DEMO AND ANY ADDITIONAL EVALUATION CRITERIA

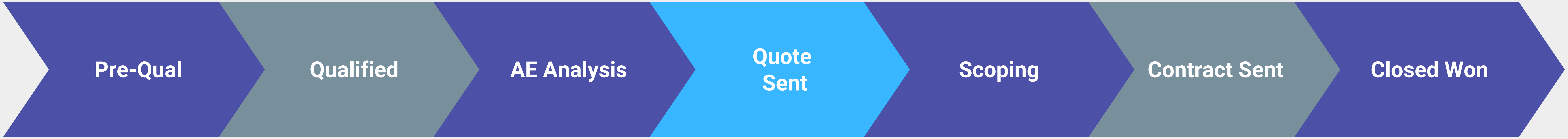
- Demo to criteria/problems/goals first, then show the icing on the cake
- Keep demo strategy top of mind: 10-step demo training (redacted link)
- Additional criteria to align on:
    - Integrations
    - Other related projects
    - Additional stakeholder evaluation
    - One layer deeper on budget
  - Update forecast based on new info



QUOTE SENT STAGE:

PURPOSE IS TO REVIEW PROPOSAL & PROVIDE TO PROSPECT VIA DEAL ROOM

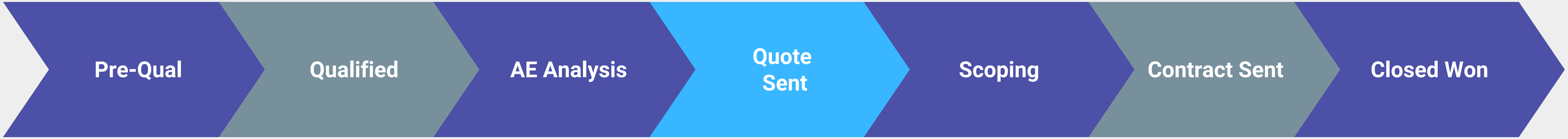
- Always review the first look at pricing/proposal via meeting
- Pay attention to the reactions, questions asked, and what’s not asked/said
- Solidify budget and timeline, align on any changes/needs/backup plans
- Walk them through the ROI tool so they’re prepared to champion it internally
- Do not leave this call without a next step scheduled
- Update forecast based on new info



QUOTE SENT STAGE:

PURPOSE IS TO REVIEW PROPOSAL & PROVIDE TO PROSPECT VIA DEAL ROOM

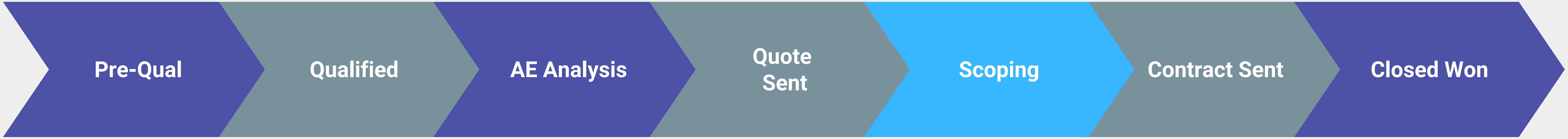
- Always review the first look at pricing/proposal via meeting
- Pay attention to the reactions, questions asked, and what’s not asked/said
- Solidify budget and timeline, align on any changes/needs/backup plans
- Walk them through the ROI tool so they’re prepared to champion it internally
- Do not leave this call without a next step scheduled
- Update forecast based on new info



SCOPING STAGE:

PURPOSE IS TO GAIN CLARITY ON WHAT'S INCLUDED, WHAT'S NOT & SELL FOR SUCCESS

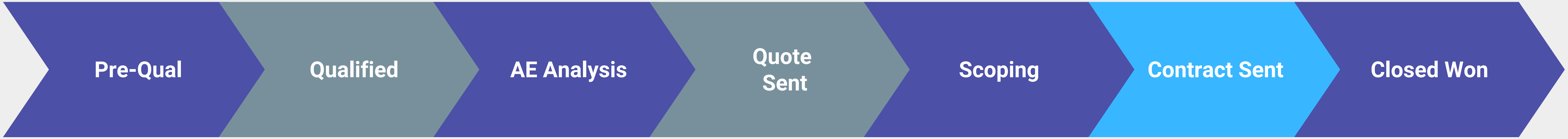
- When conducted properly, this step will be the most important in setting up a win for the transition from sales to implementation to the success team
- Prevent any situation where our future brand new customer feels surprised in a bad way & set them (and their teams) up for success by taking the time to dot all i's and cross all t's (and properly document all of it)
- An approved SOW is the exit criteria for this stage, no contract should be sent until this is complete
- Review full scoping strategy: Scoping 101 (redacted link)
- Do not leave this call without a next step scheduled
- Update forecast based on new info



CONTRACT SENT STAGE:

PURPOSE IS FINALIZE ALL NEGOTATIONS AND ALIGN ON FINAL CONTRACT LANGUAGE

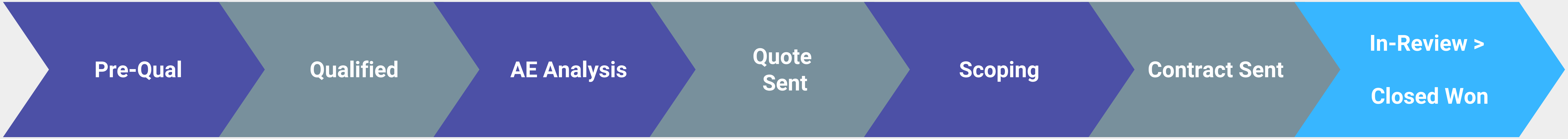
- Ensure we’re documenting not only what is in scope, but also what is out of scope based on previous conversations
- Redlines should be limited to contracts that meet the following criteria: ICP Criteria (link redacted)
- Once draft is approved, send full contract & due dilgence package to procurement, buying committee, champion
- Do not leave this call without a next step scheduled
- Update forecast based on new info



IN REVIEW > CLOSED WON STAGE:

PURPOSE IS TO COMPLETE INTERNAL CLOSED WON PROCESS & HANDOFF ACCOUNT

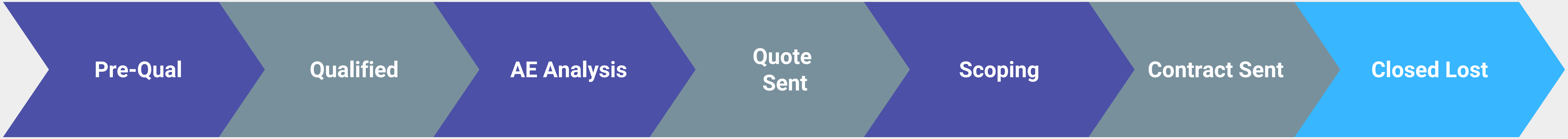
- When you move your Opp to Closed Won, a “holding bay” stage will populate called “In-Review”. This workflow will capture all required notes, documentation and criterial needed by Implementation and Success Teams prior to handoff.
- Once all criterial has been populated, submit for approval. RevOps will review within 1 business day and if approved, will move to Closed Won. if not approved, you’ll be provided with a list of requirements to complete before re-submitting
- Upon approval, schedule handoff call with assigned Implementation & Success team members



CLOSED LOST STAGE:

PURPOSE IS TO CAPTURE VALUABLE INTEL ABOUT WHY WE LOST

- Capture data in all categories that can be used in strategy to position ourselves more favorably in the future, or prevent leads from sources that have high loss rates/low ROI
  - Product (feature/functionality, integrations, etc.)
  - Market/competition
  - Price/Budget
  - Internal blockers
  - Any additional insights
- If you’re unable to reach prospect for more than 30 days, Closed Lost to keep pipeline clean/accurate



THE BUYER'S JOURNEY VS. THE SELLER'S JOURNEY

BUYER'S JOURNEY

- Awareness
- Investigation
- Commitment to Change
- Proposal Review
- Confirmation of Needs
- Validation of Choice
- Purchase

SELLER'S JOURNEY

- Pre-Qual
- Qualified
- AE Analysis
- Quote Sent
- Scoping
- Contract Sent
- Closed Won

RUNNING THE SALES PROCESS

Forecast	Deal Stage	Definition/Qualification	Notes
0%	Pre-Qual	When an AE has not yet qualified a lead, it should stay in the Pre-Qual stage until qualification occurs (SDR/form-fill/etc.)	Capture SDR qualification when stage advances to anything other than closed/lost to count for commission. SDR should add required qual data to “Notes”
5%	Qualified	AE has run Discovery and believes this is a qualified buyer (should the SDR have booked this meeting? If yes, qual, if no, reject. Even if you need to close/loss the opp after the first meeting, if the SDR should have booked the meeting, move to qualified then closed/loss so they get credit for it)	Require Product(s), Contact(s), Next Step, Close Date
10%	Analysis	Demo or Solution Reviewed against needs/asks (demo done!)	Demos should also be logged as “meetings”
25%	Quote Sent	Proposal call has been conducted, AE has reviewed pricing options with Prospect	Require $ at this stage. Approval needed to go below floor (once we get pricing right)
50%	Scoping	Buyer has picked the option to explore, is ready to move forward to start negotiations/ contracting. Scoping call has been scheduled with Solutions Engineer	Required scoping process to be conducted with Solutions Engineer
75%	Contract Sent	Contract, with Scope of Work, has been sent and final negotiations are occuring	Require tech scope/security review details
100%	Closed Won	Signed and countersigned	Can we have a “holding bay” for review/accuracy of info, attachments, data, etc. before allowing it to be officially CW?
0%	Closed Lost	Lost the Deal	Require reason in drop down, then allow free text for further explanation

PIPELINE MANAGEMENT IN SALESFORCE

*Deal Stage is Overlaid by Forecast Category

Deal Stage
Pre-Qual
Qualified
Analysis
Quote Sent
Scoping (sales engineer only)
Contract Sent
Closed Won
Closed Lost

Forecast Category	Definition
At-Risk	*Renewals Only*
Not Forecasted	Omit from my commit - I am tracking this deal but I can't even consider it pipeline at this point
Pipeline	It's moving through the funnel, but I am not ready to commit yet
Commit	I'm 80%+ confident that the deal will close by "Close Date"
Best Case	It's possible this could come in on the date reflected in "Close Date". I'm at least 50% confident that the deal could close by the close date

Forecasts pulled every Thursday from Forecast Tab

Closed, Additional Commit, Best Case

EXAMPLES:

Forecast

Forecast Category	Best Case	Close Date	12/2/2025
Probability	60%	Stage	Scoping
Next Step	Send Contract/ SOW	Next Step Due Date	10/1/2025

Forecast

Forecast Category	Commit	Close Date	10/15/2025
Probability	75%	Stage	Contract Sent
Next Step	Procurement Meeting	Next Step Due Date	9/26/2025

CRM HYGIENE EXPECTATIONS

- Deal Naming Convention =
    - New Business: Company Name - MM/YY (Example: ABC Company - 12/25)
    - Upsell/Expansion: Company Name - Upsell - MM/YY (Example: ABC Company - Upsell - 12/25)
    - Renewals: Company Name - Renewal - MM/YY (Example: ABC Company - Renewal - 12/25)
- Real-Time Updates whenever possible, end of business updates otherwise
- Anything that doesn’t automatically log for Activities is your responsibility (Call recording & transcript, email and SMS are all automated)
- When a <60-day commit slips, communicate that verbally as well right away
- More data points = more sales sophistication & knowledge
- If it’s not in CRM...it didn’t happen!