|  |  |
| --- | --- |
|  | BUYER & SALES PROCESS |
|  | What buyer is doing during this part of Sales Process | What buyer is doing during this part of Sales Process |  | What buyer is doing during this part of Sales Process |
|  | PLAN/CREATE | DEAL STAGE | DEAL STAGE | DEAL STAGE | DEAL STAGE | DEAL STAGE | CLOSED/WIN |
| **Sales Process Steps & Activities** | **(Example Activities related to deal stage)*** Prospecting Strategy
* Account, Territory & Market Research
* Research Challenges & Initiatives
* Use Various Approaches to Stimulate Interest
 | * Activities required to complete in this deal stage.
 | * Activities required to complete in this deal stage.
 | * Activities required to complete in this deal stage.
 | * Activities required to complete in this deal stage.
 | * Activities required to complete in this deal stage.
 | (**Example Activities related to deal stage)*** Get necessary documents signed
* Confirm rules of engagement including work orders and invoicing process
* Get fully executed documents back to client
* Sales transition to Professional Services meeting
 |
| **Verifiable Outcomes** | **List what is completed and recorded in CRM to prove this stage is complete*** Qualifying Notes
* Initial Email
* Update CRM
 | * List what is completed and recorded in CRM to prove this stage is complete
 | * List what is completed and recorded in CRM to prove this stage is complete
 | * List what is completed and recorded in CRM to prove this stage is complete
 | * List what is completed and recorded in CRM to prove this stage is complete
 | * List what is completed and recorded in CRM to prove this stage is complete
 | **List what is completed and recorded in CRM to prove this stage is complete*** Signed Contract
* Schedule Kick Off Meeting
 |
| **Pipeline %** | 0% | 10% | 25% | 50% | 75% | 90% | 100% |
| **Internal Enablement Tools & Job Aides** | * List internal tools that can/should be used in this deal stage
 | * List internal tools that can/should be used in this deal stage
 | * List internal tools that can/should be used in this deal stage
 | * List internal tools that can/should be used in this deal stage
 | * List internal tools that can/should be used in this deal stage
 | * List internal tools that can/should be used in this deal stage
 | * Sales to Services Transition Plan
 |
| **External Content** | * Product Collateral One Pagers
* eBooks & Guides
* Infographics
* Game Changer Videos
* Webinars
 | List external content available for rep to use during this stage | List external content available for rep to use during this stage | List external content available for rep to use during this stage | List external content available for rep to use during this stage | List external content available for rep to use during this stage |
| **Departmental Resources** | * Sales
* Marketing
* Enablement
* Sales Ops
 | * Sales
* Marketing
* Enablement
 | * Sales
* Product Consultants
* Enablement
* Sales Mgmt.
* RFP Team
* Product Marketing
 | * Sales
* Product Consultants
* Enablement
* Sales Mgmt.
* Professional Services
* Product Marketing
 | * Sales
* Product Consultants
* Enablement
* Sales Mgmt.
* Professional Services
* Product Mgmt.
* Product Marketing
 | * Sales
* Sales Mgmt.
* Finance
 | * Sales
* Sales Mgmt.
* Sales Ops
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