|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | 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 |