

Get organized

Sales Process Worksheet

A sales process is a set of repeatable steps that your sales team follows to convert prospects into customers. Use this worksheet to define your sales efforts and build a roadmap for your success.



INSTRUCTIONS

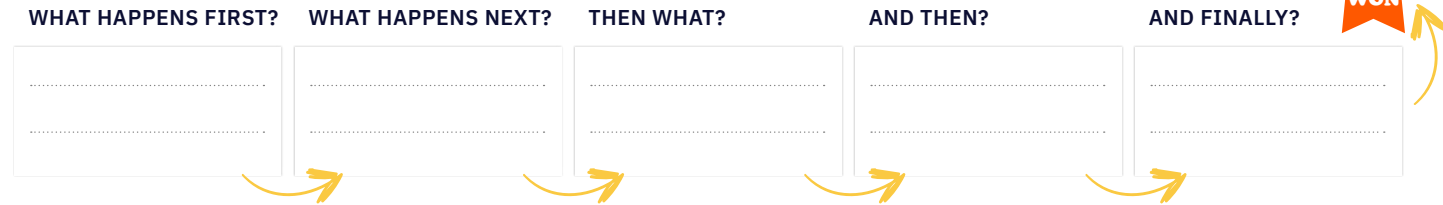
- Write down the key activities, milestones, and decisions that **need to take place** throughout the course of every sale.
- Choose a series of **sales stages** to support that process—between 3–7, depending on the complexity of the relationship. Typical stage names include:
 - Prospect
 - Propose
 - Make Contact
 - Get Signature
 - Qualify
 - Close
 - Research
 - Check-In
 - Pitch
 - Upsell
- For each stage, **list the tasks** that your development team must complete to accomplish the stage goal. Some typical tasks include:
 - Call new lead
 - Prepare for meeting
 - Conduct web demo
 - Fill out proposal

Note: Each stage should have a **goal** that reps must complete before the lead moves forward. What's the specific action or agreement that must be reached in each stage?

Optional: Do you assign leads to your sales reps based on territory, product line, value, or other criteria? **Think about the rules** you currently use to distribute each new lead to the rep who's most likely to close it. (You can automate these rules in Nutshell.)

Pro Indicates a feature only available in Nutshell Pro

Your Customer's Buying Process



Your Sales Stages (aka Your Pipeline)

*To add pipeline stages, lead assignments, goals, tasks, and automated email sequences in Nutshell, go to your [Sales Automation](#) page



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