Nutshell

101 Task Ideas for Any Sales Process

Now that you've picked out your sales process stages, it's time to fill those stages with tasks.

Tasks are the recurring activities that your sales reps follow on every lead to keep their deals moving from stage to stage.

Browse through our suggested tasks and grab the ones that make the most sense for how your team sells.

Tasks for PROSPECT stage

Collect recent customer referrals	Leverage a data intelligence tool to create a prospect list from repeat visitors to your website.	Enter new leads into your CRM*
Collect business cards at trade show/ networking event	Send direct mail campaign	Identify target accounts (for ABM businesses)
Collect recent leads from website forms and content offers*	Re-engage with lost leads*	Work with your marketing team to run targeted ad campaigns to warm up your cold call list
Research LinkedIn and Twitter for potential buyers	Buy lead list	Filter out any new leads that are clearly bogus

Tasks for PRE-QUALIFY stage

Determine if prospect is the right person to contact, based on their job title	Verify whether or not prospect's company is in an industry that your business serves
Verify size of prospect's company	Prioritize the leads that seem most worthy of your sales team's attention

* Denotes tasks that can be automated in Nutshell. (Read this for a quick rundown of how to do that.)

Tasks for INITIAL CONTACT stage

Identify a personal or professional detail to use as an icebreaker	Send cold email*	Send follow-up email (if no response within # days)*
Identify a specific challenge the prospect might be struggling with in their business	Make cold call	Make follow-up call (if no response within # days)
Identify social proof that would be relevant to the prospect (i.e., online reviews from customers in the same industry)	Leave automated voicemail	Log call notes into your CRM
Make a list of industry specific case studies to share with your prospects	Connect with prospect on social media	Send remainder of your follow-up email series*
Record personalized video		

Tasks for QUALIFY stage

Assess prospect's needs and pain points	Identify primary stakeholders and secondary influencers	Determine purchase timeline
Determine product fit	Assess prospect's budget and potential size of account	Assign lead score/lead confidence*

Tasks for EDUCATE stage

Invite prospect to informational webinar	Send competitive comparisons showing how your product/solution is superior to others the prospect may be considering	Schedule training session with prospect
Send prospect video overview of your product/solution	Send other relevant content that would be helpful to your prospect	Conduct training session with prospect
Send success stories and testimonials featuring similar customers	Subscribe prospect to trial onboarding email series*	Monitor trial progress/usage to generate specific guidance and recommendations

Tasks for RESEARCH stage

Understand what your potential client does, how they operate, and what sets them apart	Learn more about prospect's recent milestones	Search your CRM for similar customers who have had success with your solution
Learn more about prospect's specific business goals	Learn some of the jargon/terminology used in your prospect's industry so you can speak in their language	Consult with teammates on which strategies have been successful with similar prospects in the past
Learn more about the company's leadership	Prepare to discuss how your product might enhance other products, strategies, or tactics your client is currently using	See who you may be connected to on LinkedIn who knows the prospect and could be leveraged for additional influence
Learn more about prospect's industry and competitors		

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Looking for a place to learn, vent, laugh, and collaborate with other sellers? We're building a community to connect our readers—and it wouldn't be the same without you.

Come in and say hi!

LET ME IN!

Tasks for SCHEDULE PRESENTATION stage

Book time for demo, presentation, or meeting	Prepare tailored recommendations to incorporate into pitch	Prepare presentation slides
Review all the email/phone conversations you've had with the prospect so far	Prepare questions that can be used to draw out any remaining information you need from prospect	Practice presentation with a colleague
Complete "prep cheat-sheet"		

Tasks for PRESENT/PITCH stage

Create a "mental model" of how your pitch will go (believe us, it works)	Log notes from presentation into CRM	Conduct presentation follow-up call
Conduct presentation	Send follow-up email with meeting summary and relevant content	Log follow-up call notes in your CRM
Schedule follow-up call with prospect after presentation		

Tasks for SEND PROPOSAL stage

Personalize proposal based on prospect's needs	Have a colleague proofread your proposal	Schedule proposal review call
Lay out cost, terms, and timeline that were verbally agreed to	Send proposal	Conduct proposal review call
Proofread your proposal	Send follow-up email if no response after # days	Receive signed proposal

The Sell to Win Playbook

Want to learn from the masters? Read these 55 expert tips from some of the world's most highly regarded sales thought-leaders.

GET THE PLAYBOOK

Tasks for OVERCOME OBJECTIONS stage

Identify prospect's remaining concerns	Address objections with the prospect	Obtain verbal agreement for the sale (aka, Ask for the sale!)
Consult your company's internal knowledge base to find methods that your team has used to overcome objections with similar clients	Demonstrate value of your solution above other solution(s) they're considering	

Tasks for CLOSING stage

Complete final negotiations	Grab mallet, hit gong!	Follow up with customer immediately after delivery of product/service
Prepare contract	Obtain initial payment	Send welcome package
Send contract	Pass to onboarding/order fulfillment/ customer success team	Write thank-you card
Make follow-up contact if contract not received within # days*	Subscribe buyer to customer newsletter*	Update your internal knowledge base with any customer/industry insights you've gained during the course of the sale
Receive signed contract		

Tasks for NURTURE stage

Schedule recurring follow-up contact*	Conduct first upsell call	Ask for referral
Conduct first customer consultation call	Ask for positive review	Send gift after customer has been with you for ## months