Nutshell

16 Sales Process Templates for B2B Pipelines

Contents

> **Picking the right sales stages for the way you sell is one of the most important elements of a successful sales process.**
>
> **Whether you're building your first pipeline from scratch or want to overhaul an existing process, these sales process templates will give you a great head-start.**

Three-Step Sales Process (aka, the Default Process)

This is the bare minimum set of stages for a sales process with few moving parts. In fact, this is the default template in Nutshell's sales process builder.

QUALIFY

Confirm that the prospect has the budget and need to make a purchase in the near future. Verify that the point-of-contact is the primary decision-maker; if they're not, determine who else would need to sign off on the purchase.

PITCH

Demonstrate your solution to the prospect, showing how it would improve their life and/or make them more successful. Encourage the prospect to share questions and objections so you can learn more about how to best serve them.

CLOSE

Overcome last-minute objections, make final negotiations, and obtain a signed contract or initial payment to make the sale official. Then, ensure that your solution is delivered to the customer and schedule your first follow-up touches to retain their business.

Simple Outbound Sales Process for Cold Calling

PROSPECT
Find potential leads through online/social media research, networking, and asking current customers for referrals.

MAKE INITIAL CALL
Complete the first touch with a new lead via phone call. Explain the key benefits of your solution and determine if there’s mutual interest.

QUALIFY
Confirm that the prospect has the budget and need to make a purchase in the near future. Verify that the point-of-contact is the primary decision-maker; if they’re not, determine who else would need to sign off on the purchase.

PITCH
Demonstrate your solution to the prospect, showing how it would improve their life and/or make them more successful. Encourage the prospect to share questions and objections so you can learn more about how to best serve them.

CLOSE
Overcome last-minute objections, make final negotiations, and obtain a signed contract or initial payment to make the sale official. Then, ensure that your solution is delivered to the customer and schedule your first follow-up touches to retain their business.

Simple Outbound Sales Process for Cold Emailing

PROSPECT
Find potential leads through online/social media research, networking, and asking current customers for referrals.

RESEARCH
Learn about the target company's product focus, strategy, position in the marketplace, recent milestones, and leadership in order to add personalized details to your initial email.

SEND EMAIL
Complete the first touch with a new lead via email. Explain the key benefits of your solution and how it would help the prospect specifically, and attempt to set up a time to connect via phone or video-conference.

QUALIFY
Confirm that the prospect has the budget and need to make a purchase in the near future. Verify that the point-of-contact is the primary decision-maker; if they're not, determine who else would need to sign off on the purchase.

PITCH
Demonstrate your solution to the prospect, showing how it would improve their life and/or make them more successful. Encourage the prospect to share questions and objections so you can learn more about how to best serve them.

CLOSE
Overcome last-minute objections, make final negotiations, and obtain a signed contract or initial payment to make the sale official. Then, ensure that your solution is delivered to the customer and schedule your first follow-up touches to retain their business.

Simple Inbound Sales Process

REVIEW INCOMING LEADS

Analyze new leads to determine which ones are a close customer fit and worth the sales team's attention.

COMPLETE QUALIFICATION CALL

Complete the first touch with an interested lead to confirm whether or not they have the budget and need to make a purchase in the near future. Verify that the point-of-contact is the primary decision-maker; if they're not, determine who else would need to sign off on the purchase.

RESEARCH

Gather more information on the prospect in advance of a formal presentation; learn as much as possible about their company operations, desired outcomes, and the specific needs of all stakeholders.

PITCH

Demonstrate your solution to the prospect, showing how it would improve their life and/or make them more successful. Encourage the prospect to share questions and objections so you can learn more about how to best serve them.

CLOSE

Overcome last-minute objections, make final negotiations, and obtain a signed contract or initial payment to make the sale official. Then, ensure that your solution is delivered to the customer and schedule your first follow-up touches to retain their business.

Fast-Touch Inbound Sales Process

GENERATE LEADS

"Through content marketing, we generate visits to our site where the inbound requests to our sales team arise."

COMPLETE QUALIFICATION CALL

"We make a qualification call within 60 seconds, while the client is still in front of their computer or cell phone seeing our site, with their own doubts/concerns fresh in their mind. If we call the prospect five minutes later, he/she may have already entered a meeting or is driving and can not answer the call. We discovered that our conversion increases significantly the earlier we call."

EDUCATE CLIENT

"Over the next 72 hours, we try to inform the client about our services through webinars, emails, and different pieces of valuable content, and why he/she should choose our company instead of the competition."

OFFER TRIAL

"Finally, we offer the client a free trial of our services for one month, and we explain in detail how to use them to obtain the best results."

"After that, the client goes from trial to customer completely independently, with no more actions from our sales reps," Rennella adds.

Provided by Cristian Rennella
CEO and CoFounder of
elMejorTrato.com.ar

Five-Step Enterprise Sales Process

Provided by Steven Benson, Founder and CEO of Badger Maps.

INITIAL CONTACT

"We use demand generation techniques to drive awareness with potential buyers," says Benson. "We get a ton of referrals from field sales people using our product to the people they know—the secret here is to focus on making your customers successful and they will tell people about you. Prospects also receive cold calls, cold emails, our newsletter, and read content on our blog to become aware of how we help field sales people."

IN TRIAL

"Once people get through various pieces of content with different CTAs to guide them through the funnel, they sign up for our free trial. Then they receive onboarding emails to get started and can also schedule a time on our calendar for a training session/demo. Since we have their email we can now send them more valuable content and information based on their interest."

QUALIFICATION

"When someone signs up for a trial, he or she will be assigned to a specific sales rep to be qualified. That rep reaches out to them and finds out if our solution is a fit for their needs and if there is potential for more users or a team setup, etc."

TRAINING AND SUPPORT

"If the lead is qualified, the assigned account manager will provide training and a full trial for their team, make sure they're all set up, and touch base to make sure they are satisfied."

CLOSING

"Once the trial phase is over, the user purchases a subscription and becomes a customer to be passed on to the customer success team."

Trust-Building Sales Process

> “Many salespeople talk themselves out of sales every single day but it is very hard to listen yourself out of a sale,” says legendary sales coach Brian Tracy. The following template is adapted from his suggested sales stages and advice.

PROSPECT

Consider exactly what your product or service does to improve the life or work of your customer, then seek out people in the marketplace who want and need that benefit or result.

BUILD TRUST THROUGH QUESTIONING

Instead of pitching a prospective customer right away, ask a series of carefully organized questions to determine if the person has a genuine need for your product or service, and that the sale can proceed. The more questions that you ask in order to fully understand the needs of the customer, the more the customer relaxes, trusts you, and believes that your product or service is the right one for him or her.

“If you mention or discuss your product, service or price before you have established a high enough level of likability, trust, and credibility with a prospect, you will kill the sale,” Tracy says. “The prospect will tune out and will lose all interest in doing business with you. This is why you must be patient at the beginning and ask questions, listening closely to the answers, as a way of building trust.”

PRESENT

Once it is clear that the prospect wants, needs, and can benefit from your product or service, your job is to show the prospect that your product or service is the logical solution to his or her problem or need.

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Trust-Building Sales Process
(continued)

ANSWER OBJECTIONS

Objections indicate interest. Write down all the reasons that the prospect might give you for not proceeding with your offer, then develop logical answers for those objections. When the customer brings up the objection, question for clarification and then answer the objection in such a way that the customer is completely satisfied.

CLOSING

Assure that the customer has no lingering questions or objections and then invite the customer to make a buying decision. This should be simple, straightforward, and stress-free. Your job here is to close the sale painlessly and professionally and move on to completing the paperwork and delivering the product or service.

GET RESALES AND REFERRALS

Take such good care of the customer after the sale that they buy from you again and again and tell their friends. Respond quickly to your customer's needs or problems. Ask for referrals after each customer interaction. Follow-up and report back to the customer with what happened when you contacted the referral.

Proposal-Based Sales Process

MAKE CONTACT
Complete the first touch with a new lead via phone call or email. Explain the key benefits of your solution and determine if there's mutual interest.

QUALIFY
Confirm that the prospect has the budget and need to make a purchase in the near future. Verify that the point-of-contact is the primary decision-maker; if they're not, determine who else would need to sign off on the purchase.

RESEARCH
Gather more information on the prospect in advance of a formal presentation; learn as much as possible about their company operations, desired outcomes, and the specific needs of all stakeholders.

PITCH
Demonstrate your solution to the prospect, showing how it would improve their life and/or make them more successful. Encourage the prospect to share questions and objections so you can learn more about how to best serve them.

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So you have your pipeline stages... now what?

Read our "How to Implement a Sales Process" guide to learn how to automate your sales process in your CRM and measure its effectiveness.

TAKE ME THERE

Proposal-Based Sales Process

(continued)

PROPOSE

Prepare and send a detailed proposal covering what you would provide, at what cost and terms, and over what timeline.

GET SIGNATURE

Secure buy-in from the prospect by collecting the signed proposal, and prepare for closing activities.

CLOSE

Overcome last-minute objections, make final negotiations, and obtain a signed contract or initial payment to make the sale official. Then, ensure that your solution is delivered to the customer and schedule your first follow-up touches to retain their business.

Demo-Based Outbound Sales Process

PROSPECT
Find potential leads through online/social media research, networking, and asking current customers for referrals.

MAKE CONTACT
Complete the first touch with a new lead via phone call or email. Explain the key benefits of your solution and determine if there's mutual interest.

QUALIFY
Confirm that the prospect has the budget and need to make a purchase in the near future. Verify that the point-of-contact is the primary decision-maker; if they're not, determine who else would need to sign off on the purchase.

SCHEDULE DEMO
Get prospect to agree to a time and place (either in person or via video chat/web conference) to meet for the live presentation of your solution.

COMPLETE DEMO
Conduct your presentation and schedule a follow-up contact.

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Demo-Based Outbound Sales Process

(continued)

OVERCOME OBJECTIONS

Draw out the remaining roadblocks to making the sale and alleviate the buyer's concerns regarding how your product offering will meet their needs and budget. Explain how your solution is better for their specific needs than competing solutions that they may also be evaluating.

SEND CONTRACT

Deliver a formal agreement to the buyer laying out the details of the sale as you've agreed to them in conversation, and make last-minute negotiations.

CLOSE

Obtain a signed contract to make the sale official. Then, ensure that your solution is delivered to the customer in a timely fashion and schedule your first follow-up touches to retain their business.

Complex Inbound Sales Process

> This set of sales stages is typical for SaaS/web service companies (like Nutshell!)

REVIEW INCOMING LEADS

Sort through your new inbound leads, filtering out any that seem bogus or clearly aren't qualified, and prioritizing the leads that fit your ideal customer profile.

ATTEMPT FIRST CONTACT

Make the first call to a new lead in order to introduce yourself and your company. If you reach the prospect's voicemail box, explain who you are and mention that you'll be calling back at a certain day/time.

CONDUCT MEANINGFUL CONVERSATION

Complete the first legitimate phone conversation with a new lead. Explain the key benefits of your solution, determine if there's mutual interest, and offer to provide materials for further education.

QUALIFY

Confirm that the prospect has the budget and need to make a purchase in the near future. Verify that the point-of-contact is the primary decision-maker; if they're not, determine who else would need to sign off on the purchase.

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Complex Inbound Sales Process

(continued)

SCHEDULE DEMO

Get prospect to agree to a time and place to attend a live presentation of your solution via video chat/web conference.

COMPLETE DEMO

Conduct your presentation and schedule a follow-up contact.

OVERCOME OBJECTIONS

Draw out the remaining roadblocks to making the sale and alleviate the buyer's concerns regarding how your product offering will meet their needs and budget. Explain how your solution is better for their specific needs than competing solutions that they may also be evaluating.

CLOSE

Obtain a signed contract or payment information to make the sale official. Then, ensure that your solution is delivered to the customer in a timely fashion and schedule your first follow-up touches to retain their business.

PASS TO ONBOARDING

Connect your new customer with an onboarding specialist or your Customer Success team, and ensure that the customer gets everything they need to successfully integrate your solution into their business.

Account-Based Sales Process

IDENTIFY AND PRE-QUALIFY TARGET ACCOUNT

Conduct preliminary research to identify a company that would be an ideal fit for your product or service, in everything from the size of the company to the elements of their business operations that would make your product a valuable addition.

CREATE LIST OF STAKEHOLDERS

Through company website pages and social channels, find out the names of all potential stakeholders who would have a say in the purchase, from sales and marketing staff to departmental heads to C-level leadership.

ASSEMBLE INITIAL STRATEGY

Create your gameplan for the target account, based on what has been successful with similar accounts in the past. Assign stakeholders to your reps, and conduct deeper research to create the personalized content and messaging that the stakeholders will receive.

COMPLETE FIRST ROUND OF CONTACT

Make initial calls and/or send cold emails to everyone on your stakeholder list.

COMPLETE MEANINGFUL CONVERSATION

Identify interest from at least one stakeholder, learn more about their current needs, and pitch them on your solution

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Account-Based Sales Process

(continued)

SCHEDULE PRESENTATION

Get stakeholders to agree to a time and place to meet for the live presentation of your solution. Include as many decision-makers as possible.

CONDUCT PRESENTATION

Conduct your presentation and schedule a follow-up contact.

OVERCOME OBJECTIONS

Draw out the remaining roadblocks to making the sale and alleviate the buyer's concerns regarding how your product offering will meet their needs and budget. Explain how your solution is better for their specific needs than competing solutions that they may also be evaluating. Secure buy-in from all decision-makers.

SEND CONTRACT

Deliver a formal agreement to the buyer laying out the details of the sale as you've agreed to them in conversation, and make last-minute negotiations.

CLOSE

Obtain a signed contract to make the sale official. Then, ensure that your solution is delivered to the customer in a timely fashion and schedule your first follow-up touches to retain their business.

Team-Focused Sales Process

QUALIFY
Your sales development representative (SDR) makes contact with a new lead to confirm that they have the budget and need to make a purchase in the near future, and that the point-of-contact is the primary decision-maker.

RESEARCH AND SHARE INFORMATION
Your sales and marketing teams dig in deeper to learn more about the specific operations and needs of the prospect, and share information on which strategies have been successful with similar prospects in the past.

PITCH
One of your account managers demonstrates your solution to the prospect, showing how it would improve their life and/or make them more successful. During the pitch, the account manager encourages the prospect to share questions and objections in order to learn more about how to best serve them.

PROPOSE
The account manager prepares and sends a detailed proposal covering what you would provide, at what cost and terms, and over what timeline.

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Team-Focused Sales Process

(continued)

GET SIGNATURE

Your team secures buy-in from the prospect by collecting the signed proposal, and begins preparing for closing activities.

CLOSE

Your account manager overcomes last-minute objections, makes final negotiations, and obtains a signed contract or initial payment to make the sale official.

HANDOFF TO CUSTOMER SUCCESS

After the sale, your customer success team ensures that your solution is delivered to the customer in a timely fashion, and schedules the first follow-up touches to provide initial product support and retain their business.

Offer + Negotiation Sales Process

House Heroes is a "fix-and-flip" company based in Florida—kind of like what you see on HGTV, but in real life.

According to Vice President Earl White, "Our exclusive means of generating our deals is inbound marketing (SEO and Google ads) and outbound marketing (direct-mail and cold calls), and I have separate sales pipelines for each source of leads. Here's the sales template for our cold call leads, which is perhaps the most nuanced."

LEAD CONTACT INFO OBTAINED

"The beginning of any telephone marketing campaign is obtaining and uploading contact info, including e-mail, telephone, and address if available," says White. "The information may come from an opt-in campaign or data compilation services. When leads are stuck in this stage, it is an indication that your contact info for the lead is inaccurate. If most leads never move beyond this stage, it's a sign your source of contact info is generally not working."

CONTACTED LEAD

"Once we've spoke to the lead we move to a new stage. This stage exists because often you reach a lead but they are busy. You haven't yet pitched your service or made an offer."

OFFER MADE

"This stage is when we've pitched our service to the lead and are awaiting their response. Ideally, this is done over the phone but in many cases it happens via e-mail or text and we are awaiting the reply. When there is a trend that leads are not proceeding past Offer Made, it's a sign of poor leads or lead selection, or our offer details need adjustment."

From Earl White,
Vice President of
House Heroes LLC

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Offer + Negotiation Sales Process

(continued)

CONSIDERING/NEGOTIATING

"There is after we make our offer, it hasn't been rejected, and the lead is considering it. This stage is a good place to focus lead follow-up."

VERBALLY ACCEPTED OFFER

"The 'verbally accepted offer' is perhaps the most important phase for our business. These are 'hot leads' with serious interest in the service, but they've yet to sign the written agreement. We carefully monitor this phase to ensure the hottest leads get appropriate attention, but also to identify if there can be process improvements to go from verbal to signing on the dotted line."

CONTRACT EXECUTED

"This phase occurs once the lead has agreed to our service in writing. We begin to work the deal, and in our specific business, enter due diligence to purchase real estate from the lead."

DEAL CLOSED

"This is the end of the lead journey—we've successfully provided our service and closed on the real estate purchase."

Relationship-Based Sales Process #1 (Follow-Up Contact)

MAKE CONTACT

Complete the first touch with a new lead via phone call or email. Explain the key benefits of your solution and determine if there's mutual interest.

QUALIFY

Confirm that the prospect has the budget and need to make a purchase in the near future. Verify that the point-of-contact is the primary decision-maker; if they're not, determine who else would need to sign off on the purchase.

FIRST CONSULTATION

Hold a longer conversation to learn the prospect's personal and organizational needs. Identify the pain they're seeking to address, and educate the prospect on the benefits of the product/service type that you're selling.

PROPOSE A SOLUTION

Based on the prospect's needs, present a detailed plan for what you can provide that would create the best win-win situation.

CONFIRM THE SALE

Review the customer's willingness and ability to make a commitment. The goal is to build trust and make the customer as comfortable as possible with the sale.

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Relationship-Based Sales Process #1 (Follow-Up Contact)

(continued)

CLOSE
Handle any last-minute objections and obtain a signed contract to make the sale official.

FULFILL ORDER
Pass the order to your fulfillment team and personally ensure that your product or service is delivered within the timeframe specified in the contract.

COMPLETE FIRST CHECK-IN
Contact your new customer a few days to a week later to see how their experience has been so far, and address any unexpected challenges.

SCHEDULE RECURRING FOLLOW-UP
Schedule contact on a regular basis to provide ongoing guidance, listen to the customer's needs, and suggest/collect follow-up orders.

ASK FOR TESTIMONIAL/REFERRALS
Once you've retained a satisfied customer for a certain period of time, reach out to ask for a testimonial that your organization can use in marketing materials as well as referrals for potential new business.

Relationship-Based Sales Process #2 (Subscription/ Recurring Revenue Model)

MAKE CONTACT

Complete the first touch with a new lead via phone call or email. Explain the key benefits of your solution and determine if there's mutual interest.

QUALIFY

Confirm that the prospect has the budget and need to make a purchase in the near future. Verify that the point-of-contact is the primary decision-maker; if they're not, determine who else would need to sign off on the purchase.

SCHEDULE DEMO

Get prospect to agree to a time and place (either in person or via video chat) to meet for the live presentation of your solution.

COMPLETE DEMO

Demonstrate your solution to the prospect, showing how it would improve their life and/or make them more successful. Encourage the prospect to share questions and objections so you can learn more about how to best serve them.

SEND CONTRACT

Deliver a formal agreement to the buyer laying out the details of the sale as you've agreed to them in conversation, and make last-minute negotiations.

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Relationship-Based Sales Process #2 (Subscription/ Recurring Revenue Model)

(continued)

CLOSE

Obtain a signed contract to make the sale official. Then, ensure that your solution is delivered to the customer in a timely fashion and schedule your first follow-up touches to retain their business.

PASS TO ONBOARDING

Connect your new customer with an onboarding specialist or your Customer Success team, and ensure that a customer gets everything they need to successfully integrate your solution into their business.

SCHEDULE ONGOING SUCCESS CALLS

Schedule a call on a regular basis (such as monthly, quarterly, or biannually) to provide ongoing guidance, listen to the customer's suggestions, and gain insights from their experience.

UPSELL

Identify ways to expand the financial relationship, such as suggesting a higher tier of your product or a larger recurring order.

Customer Success Pipeline

> If your company sells a very complicated solution (such as software for large enterprises), your Customer Success team might use a separate pipeline for training and onboarding users after the sale. Here's an example of what that might look like:

INTERNAL HANDOFF
Receive new customer details from your sales team and get up to speed on their basic needs.

SCHEDULE INITIAL CALL
Reach out to the new customer via phone or email to introduce yourself and schedule a time to speak more in-depth about how your solution fits into their organization's goals.

COMPLETE INITIAL CALL
Speak to at least one primary contact primary or admin for 30-60 minutes to gather information about their specific needs and what they hope to accomplish with your product. Before the end of the call, schedule a time for a team training so that every user can get up and running smoothly.

COMPLETE FOUNDATION SETUP
Ensure that your solution is properly integrated within their organization and that all approved users can access it.

COMPLETE TEAM TRAINING
Host a video conference call to guide non-admins through your product and answer any questions that arise.

FINALIZE SETUP
Fine-tune your solution for the customer's needs (to the best of your ability) and provide them with any other resources they'll need to be successful. Schedule your first check-in call.

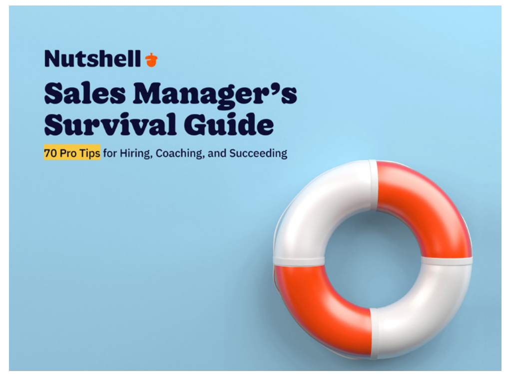
Nutshell

What can CRM do for you?

Read our free guide Does My Business Need CRM? to learn:

- The value CRM brings to your entire organization—not just sales
- Whether or not your business is ready for CRM
- What you need to know before choosing a CRM platform

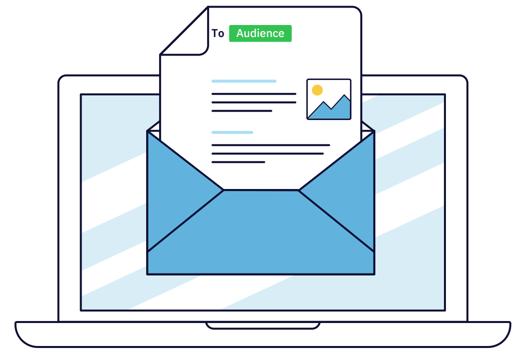
GET THE GUIDE



Want to be a better leader?

The *Sales Manager's Survival Guide* includes 70+ expert tips on hiring, coaching, and motivating your sales team. Download it today!

GET THE GUIDE



Powerful email marketing, minus the headaches

Nutshell Marketing plugs directly into your CRM data, so you can create highly targeted audience segments, track the impact of your emails in real-time, and manage all your communications out of a single tool. Get started for free!

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