7 OF 7 BEST
Business and Life Strategies, LLC

THE SNOW MILLIONAIRE MASTERY *Intensive*

SALES PROCESS
SALES FLOW

"I have always said, that everyone is in sales. Maybe you don't hold the title, salesperson, but if the business you are in requires you to deal with people, you, my friend, are in sales."

Zig Ziglar

An organization should be systems dependent... Not people dependent.

One of the questions that seems to plague our organizations is whether or not a particular client and their project something we really should be doing?

At first, we take every single client, every single job that we can get our hands on. But as we go on and grow our organization, we find that some jobs do better. And some jobs, we make more profit.

And then there are the other clients and the other jobs that are just not fun and worse, not making money.

One of the reasons is that we do not qualify the client before we take them on as clients. In our first module, we learned to quantify the clients that will satisfy our Strategic Objective. We understand the who, what, and where of our clients. And from this, we start our sales process.

The second thing we will be looking at in this sub-module: Tracking the client request through to the signed contract.

Once we know that we have a live client on our hands, we need to know how to track the request from the client completely through the whole process.

We will use a simple method to track the request, the estimate, the proposal, the delivery, the rejected contract, and of course to the signed contract!

THE SALES SYSTEMS:
Quantification / Log Sheet And Tracking

The systems are what run the company and the people are what will run your systems. Systemic thinking is the real secret behind building an organization that works.

The first two systems of Module Four Sales Systems:

1. **Qualification & Log Sheet:** This is a simple checklist that comes from your Strategic Objective. This checklist will help everyone in your organization understand who is your client and just as important who is not your client.
2. **Tracking Method:** Tracking and knowing what is where from the moment a client request something to the signed contract, is put into your sales system.

We will look at each template to understand what they are used for, why they are important, and then create them for our organization.

The first template is where everyone in the organization starts. This is where sales, the office, the field management, and even the owner will write the request for the potential client or a current client.

If it is a potential client, we use questions from our strategic objective to qualify the client. We need to make sure we will be doing are best work and that the client will be best served.

If we find that it is indeed our type of client, we start to take the information to get started in our sales process.

SALES LOG

CLIENT Qualification and Service REQUEST	
Qualify the Client	
Q1: Comercial / Residential	
Q2: Distance	
Q3: Size	
Q5: Yearly Service Available	
Q6:	
Q7:	
Date / Time of Call:	
Person taking Call:	
Company:	
New Client? - If so, how were they referred to us?	
Site Address for Service:	
Inquiry / Service Requested:	
Details of Request:	
Time Frame to Work Completion:	
Best Method of Contact (i.e. phone, fax, email):	
Given to Sales Department:	

Now we will check off this first part of our sales process into a simple excel tracking system. The top reason we track each and every process in the sales process is to know exactly where the work is located and with whom.

Client	Request Date	Field Estimate Work Orders Scheduled - Completed	Estimate Work Scheduled - Completed	Proposal Prepared - Completed	Proposal Sent to Client	Method Proposal Sent
Residential Clients						
Commercial Clients						
Multi-location Clients						
Non Paying Clients						

Ok Ladies and Gents,
Watch the Video,
Work with the Templates,
And if you have any question or need help,
Need Help, Summit the Request Form.

Be Great, Domenic