

PERSONAL DEVELOPMENT WORKSHOP

Build Your Sales Process

A Practical Workbook for Creating the Sales System That Fits What You Sell, Who You Sell To, and How You Sell Best



Chad Johnson



PERSONAL DEVELOPMENT WORKSHOP

GET BETTER SERIES

practical tools designed to work together across the suite



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CHAD JOHNSON

From the Get Better Series | **WORKBOOK**

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How to Use This Book

This is not a book you are supposed to finish, highlight, and put on a shelf. It is a workbook. The goal is to leave with a sales process you can actually use.

Write in it. Change the language. Cross things out. Add steps. Remove steps that do not fit your sale. The framework gives you direction; your experience turns it into your system.

BUILD YOURS

The goal is not to learn my sales process. The goal is to build yours.

Throughout the book, keep coming back to four questions: What am I trying to accomplish? What do I need to learn? What actions should I take? What must be true before I move forward?

Introduction — Stop Borrowing Someone Else's Sales Process

Most companies do a decent job teaching you what they sell. They show you the product, the pricing, the CRM, the territory, the customers, the policies, and the paperwork.

Then, sooner or later, somebody says: “Go sell.”

That is where a lot of salespeople get left out in the cold.

Knowing the product is not the same as knowing how to sell the product. Knowing how to enter an opportunity in a CRM is not the same as knowing what should happen between the first conversation and the signed agreement.

So the salesperson starts figuring it out on the fly. They copy another rep. Try a script. Change the presentation. Chase a few bad deals. Send proposals too early. Miss a decision-maker. Follow up too much on one opportunity and not enough on another.

Eventually, if they stay in the business long enough, they start developing a process. The problem is that it can take years.

BUILD YOURS

It does not have to take years. You can build the process intentionally instead of accidentally discovering it.

A process gives you direction. It helps you know where you are, what you are trying to accomplish, what you still need to learn, and what should happen next.

Without one, selling can feel like wandering around the woods. You may be moving all day, but movement is not the same as direction.

A defined process gives you the red knob on the white stick. You know where you are headed, and you have something to follow.

You Are Building a System

Before we go any further, understand what we are actually doing here. We are building a system.

Not a pile of tips. Not a list of things to remember. Not one perfect script.

A system gives you a repeatable way to approach the work. It answers practical questions: Where do I start? What comes next? What information do I need? What is the objective at this stage? How do I know whether the opportunity is moving? What do I do when it stalls?

We will start with the overall sales process. Then we will break each stage into a smaller process. Then we will add the questions, actions, tools, checkpoints, and measurements that make it useful.

The pieces connect. Targeting affects qualification. Qualification affects discovery. Discovery affects the business case. The business case affects the close. Delivery affects the next opportunity.

CORE IDEA

Each part has a purpose. Each part connects to the next. And when something is not working, you have a place to look.

THE SALES SYSTEM



Each stage gives the next stage better information.

Instinct, personality, and experience still matter. A system does not remove judgment. It gives your judgment somewhere to operate.

The goal is simple: at the end of this book, you should be able to say, “This is how I sell.”



PART 1

Build the Process Before You Use the Process

Chapter 1 — Understand How You Actually Sell

Before you build a sales process, understand the sale.

Selling a \$500 service to a business owner is not the same as selling a \$500,000 solution to an organization with multiple stakeholders, procurement rules, budget cycles, technical reviews, and implementation risk.

The fundamentals may be similar. The process will not be.

Your Process Has to Match the Sale

Do not copy a process from somebody selling something completely different and assume it belongs in your business.

Your process should match what you sell, who buys it, why they buy, how much it costs, how much risk the customer feels, how many people are involved, how long the decision takes, and what has to happen before they can say yes.

Simple Sale or Complex Sale?

Sales live on a continuum. A simple sale may have one decision-maker, a low investment, little customization, and a short buying cycle. A complex sale may involve multiple stakeholders, a significant investment, a longer timeline, competition, politics, procurement, budget cycles, legal review, technical evaluation, and implementation concerns.

Neither is better. The right process is the one that fits the sale.

CORE IDEA

Simple sale example: Target → Understand Need → Recommend → Decide → Follow Up

BUILD YOURS

Complex sale example: Target → Qualify → Discover → Map Stakeholders → Build Business Case → Develop Solution → Navigate Approval → Negotiate → Implement → Grow

Start With the Customer

A salesperson may think the process is: call, demonstrate, quote, propose, close. The customer may be doing something very different: recognize a problem, decide whether it matters, compare options, involve other people, find budget, reduce risk, get approval, and finally make a decision.

That means you should ask two questions throughout the sale: “What should I do next?” and “What does the customer need to do next?”

CORE IDEA

Stop moving according to your calendar. Start moving according to customer progress.

Seven Factors That Shape Your Process

- The offer
- The customer
- The problem
- The risk
- The decision process
- The timeline
- The cost of change — including the cost of doing nothing

Build Your Sales Environment Profile

What I sell:

Typical customer:

Primary problem I solve:

Average deal size:

Typical sales cycle:

How many people are usually involved:

Who usually approves:

Who can stop the decision:

What customers hesitate about most:

What happens if they do nothing:

What usually makes the sale complex:

Where opportunities usually stall:

Your Style Matters Too

Your process also has to fit you. Some sellers are analytical. Some are relationship-driven. Some are direct. Some are patient and consultative. Some are great presenters. Some are strongest one-on-one.

You do not have to change your personality to fit somebody else's process. But your process should take advantage of your strengths and protect you from your tendencies.

A relationship-driven seller may need stronger qualification so "nice conversations" do not become fake opportunities. A results-driven seller may need a deliberate discovery step so they do not present too fast. A detail-oriented seller may need a checkpoint that prevents them from overwhelming the customer.

CORE IDEA

Your style should shape how you execute the process. It should not determine whether you follow one.

Process Creates Freedom

Think about a quarterback. The team has a play, a formation, routes, reads, and responsibilities. Then the ball is snapped and reality happens. The quarterback adjusts.

The structure does not eliminate judgment. It makes judgment useful. Without the play, everyone is just running around hoping somebody gets open.

Your Sales Environment Statement

I sell _____ to _____ who typically need to solve _____.

The average decision involves _____ people, takes approximately _____, and normally requires the customer to overcome _____.

Because of that, my sales process needs to be especially strong in:

COMMON MISTAKE

Do not ask, "What is the best sales process?" Ask, "What process does this sale require?"



PART 2

The Sales Process



Stage 1 — Target the Right Opportunities

Prospecting starts before the phone call. It starts with deciding who deserves your time.

CORE IDEA

Prospecting should not begin with “Who can I call?” It should begin with “Who should I call?”

You can make more calls, send more emails, attend more events, drive more miles, and have more meetings. None of that guarantees you are working the right opportunities.

You can be extremely busy and still be pointed in the wrong direction.

Think about a rocking chair. You can rock harder, faster, longer, and even track how many times you rocked. You still did not go anywhere.

Identify → Prioritize → Research → Find a Reason → Approach

1. Identify

Start by identifying customers most likely to benefit from what you sell. Do not overcomplicate the ideal customer profile. Look for patterns in your best customers.

Who already buys? Who gets the most value? Who is easiest to help? Who stays? Who refers? What problems or circumstances show up repeatedly?

Look Back Before You Look Forward

Study your best accounts, not only your biggest accounts. Why did they buy? What problem existed? What changed? Who became involved? What almost stopped the deal? What created value?

Characteristics shared by my best customers:

--

Common problems they have:

--

Circumstances that create opportunity:

--

2. Prioritize

Not every target deserves equal attention. Some deserve a lot. Some deserve a little. Some deserve none right now.

You can use a simple A/B/C system: A accounts are strong fit, strong potential, good timing, and have a reason to pursue. B accounts fit but timing or need is less clear. C accounts are possible fits but low priority.

The labels can change. A C account today can become an A account tomorrow when something changes.

3. Research

Research should match the opportunity. You do not need three hours of research for every call. You need enough context to improve your approach.

Look for what is happening, what is changing, who is involved, what pressures exist, what goals are public, and what might create a reason for a conversation.

Useful sources might include company websites, public reports, LinkedIn, job postings, trade publications, public budgets, board minutes, current projects, leadership changes, CRM history, and relationships.

CORE IDEA

Research is useful when it improves the questions you ask.

4. Find a Reason

Before contacting someone, ask: “Why am I contacting them now?”

The reason might be growth, new leadership, a contract expiration, regulation, an inspection, a budget cycle, aging equipment, a project, a referral, a conversation at an event, or something you noticed.

Trigger events create movement in the customer’s world. They do not guarantee a sale, but they can create a reason to start a conversation.

My common trigger events:

--

Where I can monitor them:

--

5. Approach

Only now do we get to what most people call prospecting.

The first approach does not always need to sell. Its job may simply be to create the next conversation, confirm a problem, ask a relevant question, or schedule time.

Do not try to fit your entire company into a voicemail. Do not make the cold email do the whole sale. The objective is movement.

Target Accounts, Not Just Leads

Especially in complex sales, think about accounts, not just individual names. One contact can leave, lack authority, support you, oppose you, or disappear. The question is not only “Who can I contact?” but “What account should I develop?”

Target Exit Criteria

Move from Target to Qualify when there is a reasonable customer fit, a possible business need, enough potential value to justify the effort, a reason to pursue, and at least one path into the organization.

My Target exit criteria:

CORE IDEA

We did not simply say “prospect more.” We created a way to prospect. That is the difference between advice and a system.



Stage 2 — Qualify the Opportunity

You found someone who fits your target market. Great. That does not mean you have a sale. It does not even mean you have an opportunity yet.

It means you have earned the right to learn more.

CORE IDEA

Qualification is how you stack the deck in your favor by investing more time in opportunities that have a better chance of becoming real business.

Fit → Need → Ability → Timing → Buy-In → Next Step

Targeting Is Not Qualification

Targeting says the customer resembles people who may buy. Qualification goes deeper. A homeowner has a roof. That makes them a possible roofing customer. It does not tell you whether the roof is damaged, whether they recognize a problem, whether they can act, or whether timing makes sense.

1. Fit

Could this realistically be one of our customers? Do not force a bad fit because you need pipeline.

Strong-fit characteristics:

Warning signs of poor fit:

2. Need

Need is the foundation of qualification. The customer may recognize it, or they may not.

Do not rely on “Do you need what I sell?” Sometimes your job is to help the customer understand the condition through a conversation, assessment, inspection, audit, demonstration, data, or a different perspective.

CORE IDEA

You are not creating a fake problem so you can sell something. You are determining whether there is a real problem worth solving.

At this stage, you do not need the entire answer. Qualification is not Discovery. You are simply deciding whether there is enough need to justify going deeper.

3. Ability

Can the customer realistically move forward? That may involve budget, authority, approvals, procurement, implementation, or the size of the investment.

In a complex sale, you may not know every detail yet. Gather enough to know whether the path is realistic.

4. Timing

Need does not automatically mean now. Timing may depend on budget cycles, contracts, projects, leadership, funding, seasons, inspections, renewals, or other events.

A good customer at the wrong time can still be a good future customer. Your process should keep them visible without forcing you to chase them every week.

5. Buy-In

Qualification is not something you do to the customer. The customer has to see enough value to keep participating.

Why should they take the next meeting? Why should they do the assessment? Why should another person join? Why should they give you information? Every next step needs enough value to justify itself.

Use Qualification to Learn the Person

Rapport starts here. Pay attention to how the person communicates, what matters to them, how much detail they want, whether they are direct, analytical, relationship-driven, cautious, or fast-moving.

CORE IDEA

The prospect may think you are making small talk. You should be paying attention.

The process gives you structure. Your judgment tells you how to operate inside it.

6. Next Step

Every step in a complex sale should create movement. Do not end with “I’ll touch base sometime.” Define what happens next.

Not Qualified Does Not Mean Dead

Maybe there is no current need. Maybe timing is wrong. Maybe budget is years away. Maybe they are satisfied. You still learned something.

The account may move to nurture, trigger monitoring, future follow-up, or no active pursuit at all. Qualification tells you not only whom to pursue, but how much attention an opportunity deserves right now.

Qualify Exit Criteria

Move forward when there is a reasonable fit, a potential need worth exploring, enough customer buy-in to continue, reasonable timing or a known future trigger, a path toward the people involved in the decision, and a defined next step.

My qualification criteria:



Stage 3 — Discover What Is Really Going On

You have identified the right prospect and qualified enough of the opportunity to know it deserves more of your time.

Now slow down.

This is where salespeople often get themselves into trouble. They hear one familiar problem and immediately think, “I know exactly what you need.” Then they start selling.

COMMON MISTAKE

The mistake is not talking too much. The mistake is talking about your solution before you have created enough reason for the customer to care about it.

Current State → Problem → Impact → Desired State → Problem Gap → Build Priority

Start Where They Are

If somebody asks you for directions, you need to know where they are before you can tell them how to get where they want to go. Discovery works the same way.

What are they doing now? What works? What does not? What changed? What have they tried? What happens if nothing changes? Where would they rather be?

1. Current State

Understand how things work today before you judge them. The current solution may be imperfect, but parts of it may work very well. If you attack everything the customer currently does, you can lose credibility quickly.

What I need to understand about the current state:

2. Problem

The first answer is not always the actual problem. “We need new software” may really mean “our systems do not communicate and people are wasting hours entering the same information twice.”

Keep asking until you understand what sits underneath the symptom. Do not interrogate. Follow the conversation.

3. Impact

A problem without consequences may never become a priority. What does the problem cost? Who does it affect? What risk does it create? What happens if it continues?

Customers can live with problems for a long time. Eventually “this is how we have always done it” starts to feel normal. Discovery brings the consequences back into focus.

4. Desired State

Do not only ask what is wrong. Understand what the customer wants instead. What would better look like? What would success look like? What would change if the problem disappeared?

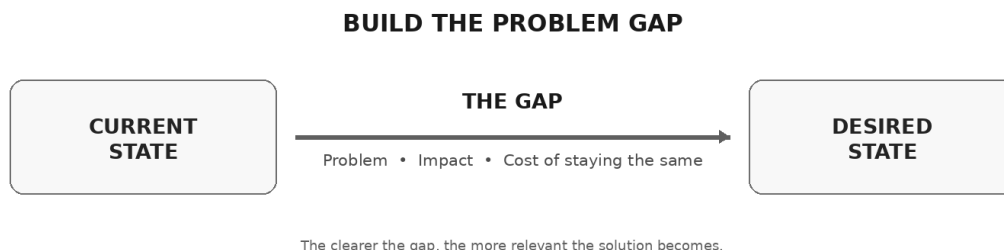
5. Build the Problem Gap

The problem gap is the space between where the customer is today and where they want to be.

Current state: what is happening now. Desired state: what they want instead. The gap: what prevents them from getting there and what continuing to stay where they are costs them.

CORE IDEA

Ask until the problem gap is strong enough. Then move.



Forget the Talk/Listen Scorecard

You have probably heard “listen more than you talk.” That is fine advice when the buyer is talking and giving you useful information. Keep them talking. Ask another question. Dig deeper.

But there is no magic percentage. A salesperson may need to educate, explain, challenge an assumption, reframe the situation, share an example, or help the customer see something they have not considered.

Sometimes you may talk more than the customer. That alone does not make the meeting bad.

CORE IDEA

The better rule is: keep asking questions before you try to sell or close too early.

Clarify What You Heard

Summarize the situation back to the customer: “Let me make sure I understand.” Then confirm the current state, problem, impact, desired outcome, and why it matters.

You would rather be corrected during discovery than build an entire proposal around something you misunderstood.

6. Build the Priority

Finding a problem is not enough. Customers have plenty of problems. Your job is to help them understand why this one deserves attention.

Do not simply ask “Is this a priority?” and pack up when the customer says no.

If you prepared properly, found a legitimate problem, understand the consequences, and know you can help, find out why it is not a priority. Maybe the customer does not understand the impact. Maybe you have not connected it to something they care about. Maybe another problem is consuming attention.

Go back. Ask another question. Reposition. Connect the problem to money, time, risk, growth, efficiency, customers, employees, reliability, opportunity, or whatever matters in that situation.

CORE IDEA

Make them earn the “not a priority.” Do not hand it to them.

BUILD THE PRIORITY



Help the customer connect the dots. Do not manufacture urgency.

This is not manufactured urgency. It is helping the customer understand the consequences and value clearly enough to decide what deserves attention.

Know When You Know Enough

Discovery does not mean asking questions forever. There comes a point when the customer understands the problem, the impact is clear, the desired outcome is clear, and the issue has enough priority to justify the next step.

Do not hide behind discovery because you are afraid to advance the sale. The purpose of slowing down is eventually to move faster with better information.

Discovery Exit Criteria

Before moving on, you should reasonably understand the current situation, the real problem, its impact, the desired outcome, the problem gap, why action matters, and whether your solution can realistically help.

Discovery Worksheet

Build a question bank you can pull from. This is preparation, not a script.

Current-state questions:

Problem and impact questions:

Desired-state and problem-gap questions:

Priority questions:



Stage 4 — Map the Sale

You understand the problem and the gap. Now you need to understand how a decision actually gets made.

A great solution can still lose if the wrong people are missing from the process.

People → Influence → Motivation → Process → Obstacles → Access

1. People

Who is involved? The user, manager, budget owner, technical evaluator, executive, procurement, outside consultant, board, owner, spouse, or somebody else? It depends on what you sell.

Do not make assumptions from titles alone.

Do Not Ask Only Who Can Say Yes

Find out who can say no. Someone may not have final approval but still have enough influence to stop the deal.

2. Influence

Who drives the project? Who does everyone listen to? Who owns the problem? Who controls resources? Who is skeptical? Who quietly has more influence than their title suggests?

3. Motivation

Organizations do not buy. People inside organizations buy, and they may care about different things.

Finance may care about cost. Operations may care about reliability. Leadership may care about risk. Users may care about ease of use. Same solution. Different value.

Key stakeholder / what they care about / likely concern:

4. Process

How does the customer actually buy? Quote? Formal proposal? Demonstration? Inspection? Legal review? Finance? Procurement? Committee? Board? Budget approval? Trial? Contract?

CORE IDEA

Ask early: “If you decided you wanted to move forward with something like this, what would normally have to happen?”

The customer may not have the process perfectly mapped either. You sell this every day. They may buy it once every five years. Part of your value is helping them navigate the decision.

5. Obstacles

What normally stops deals like this? Budget? Timing? Fear of change? Current vendor? Internal politics? Procurement? Implementation? Competition? Doing nothing?

If the same objection appears repeatedly, do not wait until the end to discover it. Build your process so it is addressed earlier.

6. Access

Knowing who matters is not enough if you only have a relationship with one person.

Sometimes your contact can introduce you. Sometimes you need a larger meeting. Sometimes you cannot get direct access and must help your contact sell internally.

CORE IDEA

If your customer has to sell your solution internally, make sure they are equipped to do it.

Do Not Lose Control of the Process

Control does not mean controlling the customer. It means keeping direction. What happened? What happens next? Who owns the action? When will it happen?

Do not let a good meeting end with “We’ll get back to you.”

Map Exit Criteria

Before investing heavily in the final solution, understand who is involved, who influences the decision, who can approve, who can stop it, what matters to the key people, how the buying process works, what obstacles are likely, and how you will stay involved as the decision moves through the organization.

Map one live opportunity:



Stage 5 — Build the Solution

Now you are finally ready to put the solution together.

Notice how long it took to get here. That is intentional.

You targeted, qualified, discovered, built the problem gap, created priority, and mapped the people and process. Now your solution has context.

Problem → Solution → Value → Proof → Objections → Business Case

Stop Selling Everything You Have

Do not show every feature, service, certification, option, and slide because you are proud of it. If you tell the customer everything and hope they figure out what matters, you are making them do your job.

1. Start With the Problem

Begin with what the customer told you. “Based on our conversations, there are three things we are trying to accomplish.” Then state them.

That immediately tells the customer you listened and creates context for everything that follows.

2. Connect the Solution

A feature is what something does. A benefit is why that is useful. An outcome is what changes for the customer.

The further you can get toward the outcome, the more relevant the conversation becomes.

Feature → Benefit → Customer Outcome:

3. Establish the Value

Why is solving this worth doing? Value might show up as lower cost, reduced risk, longer life, less downtime, growth, customer experience, predictability, compliance, time saved, or peace of mind.

Use the customer’s language. If they called it “putting out fires,” do not turn it into a phrase nobody in their company would ever say.

4. Provide Proof

Proof can include results, case studies, existing customers, references, data, demonstrations, inspections, experience, warranties, guarantees, or success stories.

A short relevant story can help the customer picture the future state: what was happening, what changed, what was done, and what happened afterward.

5. Preempt the Objections

By now many objections should be predictable. If implementation is always a concern, address implementation. If price is always an issue, build value before price. If customers worry about support, explain support.

CORE IDEA

Fill in the gaps before the customer fills them with assumptions.

Common objections I should address earlier:

6. Build the Business Case

A customer may like your solution and still need to justify it to somebody else. The business case connects the problem, solution, value, investment, risks, and expected outcome.

Build it with the customer when possible. Ask what finance will want to see, what leadership will care about, and what concerns other stakeholders are likely to raise.

The business case can grow as the sale develops. Do not create a fifty-page document when five clear points will do.

Problem:

Why it matters:

Desired outcome:

Recommended solution:

Value:

Investment:

Risks/concerns:

Proof:

Next step:

Watch for the Buying Cue

At some point the customer's questions change. They stop asking what something does and start asking when you can start, what implementation looks like, what the contract says, or which option makes sense.

Do not keep presenting because you still have slides left. If they are ready, move.

Build Exit Criteria

Move forward when the solution clearly connects to the problem, addresses the desired outcome, creates enough value to justify the investment, makes sense to key stakeholders, has supporting proof, anticipates predictable concerns, and gives the customer enough information to explain the decision internally.



Stage 6 — Advance the Sale

At some point, you have to ask for something.

Good meetings happen every day that end with nothing happening. Everybody smiles, shakes hands, and says the presentation looked great. Then two weeks later the salesperson sends: “Just checking in.”

CORE IDEA

A good conversation is not necessarily progress. Something has to change.

Recognize → Ask → Commit → Act → Follow Up → Resolve

Closing Is Not One Event

Complex sales usually contain a series of smaller commitments before the final one: the meeting, the assessment, the information, the stakeholder introduction, the proposal review, the approval, and eventually the sale.

Sell the Next Step

If the customer is not ready to buy, do not ask them to buy. Ask for the next reasonable commitment that moves them closer to being able to decide.

That might be another meeting, an inspection, a demonstration, data, a stakeholder introduction, a technical review, or a proposal review.

1. Recognize

Buying cues may include questions about timing, implementation, contracts, pricing details, options, starting dates, or what happens after signing. Pay attention.

Do Not Keep Selling After They Have Bought

The customer may be ready while you are still presenting. Do not create new objections because you cannot stop talking.

2. Ask

You did the work. When the time is right, ask clearly and confidently.

Closing should feel like the next logical step. If it feels completely disconnected from the conversation, the problem may have happened earlier: weak need, weak priority, missing people, unclear value, or unresolved concerns.

Trial Closes Are Small Commitments

Questions such as “Does this solve the problem the way you expected?” or “If we handle that concern, would you be comfortable moving forward?” help you learn whether the customer is moving toward a decision.

3. Commit

A verbal yes is exciting, but know what actually makes something a sale in your business: signature, purchase order, deposit, contract, approval, or something else.

4. Act

When the customer is ready, make it easy to move. Have the paperwork, calendar, agreement, or introduction ready. Momentum matters.

What, Who, When

KEY QUESTION

Every meaningful next step should answer: What needs to happen? Who owns it? When will it happen?

Whenever possible, schedule the next meeting while you are still together. Unnecessary dead space is one of the easiest ways for deals to lose momentum.

5. Follow Up

Follow-up happens throughout the sales process, not just after a proposal. The first conversation, assessment, discovery, stakeholder meeting, presentation, proposal, and contract may all require follow-up.

Follow up with purpose. If you defined the next action properly, you have something specific to discuss.

6. Resolve

When a deal stops moving, find the holdup. Is the problem weak? Is priority low? Is value unclear? Is a stakeholder missing? Is there an objection? Is money the issue? Is timing the issue? Have you actually asked?

The sales process is not always a straight line. Sometimes you go backward to move forward.

Persistence Without Relentlessness

Customers are busy. They are not waking up every morning thinking about your proposal. Follow up. Be professional, relevant, and persistent. But know when active pursuit no longer deserves your time.

Advance Exit Criteria

There are two exits: the customer makes the commitment that officially creates the sale, or the opportunity moves out of active pursuit and into lost, nurture, future follow-up, or trigger monitoring.

What officially makes something sold in my business?

When will I stop actively pursuing an opportunity?



Stage 7 — Deliver & Grow

Congratulations. You got the sale. Now do not disappear.

You built the relationship, made the promises, and created the expectations. The customer may work with operations, implementation, service, or support after the sale, but you should not vanish the minute the order is signed.

Set Expectations → Follow Through → Communicate → Review → Anticipate → Grow

1. Set Expectations

Make sure everyone understands what was purchased, what happens next, who owns what, the timeline, what the customer needs to provide, who they should contact, and what happens if something changes.

Remember What You Sold

Complex sales contain promises, special requests, timing commitments, and expectations. Make sure those survive the handoff.

Customer handoff — problem / outcome / promises / stakeholders / timing / concerns:

2. Follow Through

Before the purchase, the customer had to trust what you said you would do. After the purchase, they get to see what you actually do.

If you say you will call Friday, call Friday. If something goes wrong, do not hide. Problems happen. Responsiveness and honesty determine whether the problem weakens the relationship or strengthens it.

3. Communicate

Do not make the customer chase you. Silence creates uncertainty. A short update can preserve confidence and remind the customer that you are still paying attention.

4. Review the Value

Go back to the original problem gap. Did the situation improve? Did the customer get the outcome they expected? What changed? What worked? What did not?

Closing the loop helps the customer see the value, helps you learn, and creates proof you may be able to use later.

Ask for Feedback

Why did they choose you? What almost stopped them? What mattered most? What could you have explained better? What has been better than expected? What could improve?

CORE IDEA

Your customers can tell you things no sales seminar ever will.

5. Anticipate

The customer's needs keep changing. Watch for the next problem, budget cycle, growth event, replacement need, renewal, new department, or new goal.

When you know the customer well enough to see something coming, help them get ahead of it.

6. Grow

If the customer is happy and another legitimate need exists, sell them something else. Upsell, cross-sell, renew, expand, or add another location when it truly fits.

The second sale may move faster because you already understand the people and process, but do not skip the thinking. Go back through the system as needed.

Ask for the Referral

If somebody is happy with you, ask. You do not need a complicated script. Earn the right, then ask.

A referral feeds Stage 7 back into Stage 1. The process begins again.

Create Advocates

Satisfied customers can become testimonials, references, case studies, reviews, introductions, and stories. Those become proof for future customers.

Deliver & Grow Has No Final Exit

As long as the relationship matters, the stage continues. Define what good account management looks like for you.

Deliver & Grow Worksheet

Use this page to define the ongoing rhythm for an existing customer relationship.

How I will stay involved:

How I will review the value delivered:

Future needs or trigger events I will watch for:

When I have earned the right to ask for a referral, testimonial, or introduction:



PART 3

Build Your Sales Playbook

Build Your Sales Playbook

You now have the pieces. The next step is connecting them into one system you can actually use. The seven stages are the framework. Your playbook is what you do inside the framework.

CORE IDEA
Your playbook should be detailed enough to give you direction and simple enough that you will actually use it.

The Six Things Every Stage Needs

- Objective — What am I trying to accomplish?
- Actions — What do I normally do?
- Questions — What do I need to learn?
- Tools — What helps me do it?
- Exit Criteria — What must be true before I move forward?
- Next Step — What does advancement normally look like?



Your One-Page Framework

TARGET — Identify → Prioritize → Research → Reason → Approach

QUALIFY — Fit → Need → Ability → Timing → Buy-In → Next Step

DISCOVER — Current State → Problem → Impact → Desired State → Problem Gap → Build Priority

MAP — People → Influence → Motivation → Process → Obstacles → Access

BUILD — Problem → Solution → Value → Proof → Objections → Business Case

ADVANCE — Recognize → Ask → Commit → Act → Follow Up → Resolve

DELIVER & GROW — Set Expectations → Follow Through → Communicate → Review → Anticipate → Grow

Change the words. Add a step. Remove a step. Combine stages if your sale requires it. The point is not to copy the diagram. The point is to build yours.

Build Around Your Strengths and Weaknesses

My biggest sales strength:
How my process uses it:
My biggest sales weakness:
How my process protects me from it:

Build Your Question Bank

Targeting questions:
Qualification questions:
Discovery questions:
Problem-gap questions:
Priority questions:
Decision-process questions:
Objection questions:

Closing questions:

Customer-review questions:

Scripts Are a Foundation, Not a Crutch

Prepare the language you use repeatedly: your introduction, reason for calling, value proposition, common follow-up, explanation of your process, objection responses, closing language, and referral request.

The goal is not to sound scripted. The goal is to become so comfortable with the material that you can have a real conversation.

Make Your CRM Match Reality

Your CRM should help you see where the opportunity actually is, what is missing, what should happen next, and where deals are stalled.

Do not move an opportunity forward because you completed an activity. “I sent the proposal” does not mean the customer progressed.

CORE IDEA

Activity is not progress.

Define Progress

Progress means something changed in the buying process: a stakeholder agreed to meet, the customer provided information, the problem became clearer, priority increased, a technical review happened, a proposal review was scheduled, or the agreement was signed.

In my sale, progress looks like:

Build Your Weekly Operating Rhythm

Prospecting — when / goal:

Follow-up — when / goal:

Opportunity development — when / goal:

Existing customers — when / goal:

Planning — when / goal:

Pipeline review — when / goal:

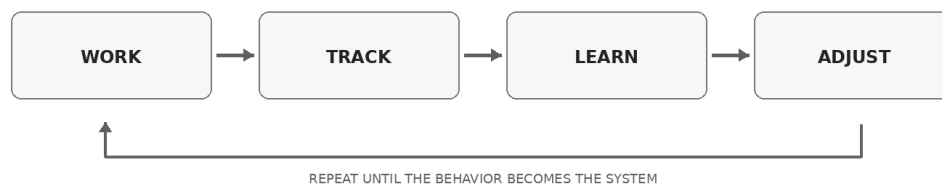
Version One Is Enough

Do not spend three months trying to build the perfect playbook before using it. Build version one. Sell. Learn. Adjust.

BUILD YOURS

Build → Execute → Learn → Improve

IMPROVE THE SYSTEM



A question does not work? Change it. A stage is unnecessary? Remove it. Deals keep stalling in the same place? Look there. A stakeholder keeps showing up too late? Move them earlier in the process.

The process gets better because you use it, not because you stare at it.



PART 4

Manage and Improve Your Sales Process

Manage and Improve Your Sales Process

You built the process. Now make it better.

A sales process should never really be finished because you are not finished. You are learning. Your customers change. Your market changes. Your product changes. And hopefully you become a better salesperson.

Your First Process Will Not Be Your Best Process

You improved at selling by doing it, learning, adjusting, and doing it again. Your process should develop the same way.

Version one gives you something to follow. Version two gets better. Then one day you look back and realize you sell completely differently than you did two years ago.

The Compounding Effect of Getting Better

One better question does not change your career tomorrow. One better follow-up does not double your income next week. But small improvements stack.

You qualify a little better. Discover a little better. Position priority a little better. Involve stakeholders earlier. Follow up with more purpose. Close a little better. Retain customers a little better.

At first, the growth can look small. Then the results begin to compound: stronger pipeline, better meetings, less wasted time, more referrals, higher close rates, and stronger relationships.

BUILD YOURS

From the outside it may look like things suddenly took off. They did not. You were building it the entire time.

Track Yourself, Not Just the Number

Revenue, quota, and commission matter, but they tell you what happened. They do not always tell you why.

The better question is: “Am I better than I was?” Are your meetings better? Are fewer deals getting stuck? Are you finding better opportunities? Are you getting to decision-makers sooner? Are customers referring you more often?

Track Just Enough to Get Better

Here is where sales systems can go off the rails. People decide to measure everything. Calls, emails, talk time, stage velocity, proposal volume, win rate, loss rate, average deal size, follow-up attempts, and seventeen other numbers.

Before long, the salesperson is spending more time measuring sales than selling.

CORE IDEA

Tracking is supposed to help you get better. It is not supposed to become another job.

Start With Two Weeks

For the next couple of weeks, work your process and pay attention. Pick one or two areas you want to improve. Maybe three. No more.

Maybe you need better targeting. Maybe discovery is weak. Maybe deals stall after proposals. Maybe you need earlier stakeholder access. Maybe follow-up is inconsistent.

For the next two weeks, I want to improve:

Why these areas matter:

Measure Progress, Not Busyness

If twenty well-directed calls create three real opportunities, that may be more valuable than one hundred random calls that create nothing. Do not automatically respond to weak results by doing more of the same thing.

Ask what the activity produced.

Look for Movement

One of the easiest measurements is simply: Did the opportunity move? Did another stakeholder join? Did the customer provide information? Did priority increase? Did a next meeting get scheduled? Did they request terms? Did they buy?

Find the Bottleneck

If you have targets but cannot get meetings, look at Target. Meetings but no real need? Look at Qualify and Discover. Good problems but no decision access? Look at Map. Strong presentations but no movement? Look at Build and Advance. Happy customers but no growth? Look at Deliver & Grow.

The process tells you where to look.

Do Not Fix Everything at Once

Find the biggest issue. Work on it. Give the change enough repetition to learn something. Then decide whether to keep, adjust, or remove it.

Tracking Is Training Wheels

The purpose of tracking is awareness. Awareness creates improvement. Repetition creates habit. Habit becomes part of the system.

Eventually you no longer need the checkbox reminding you to establish a next step. You just do it. You no longer need to remind yourself to map stakeholders. You feel when somebody important is missing.

Two-Week Check-In

What improved?

--

What still feels weak?

--

Where are deals getting stuck?

--

What am I doing more consistently?

--

What am I wasting time on?

--

What seems to be working better?

--

What is the one thing I should change next?

--

Then Get Back to Selling

Make the change. Put it into the process. Get back to work. Do not live inside the spreadsheet. The customer is not in the spreadsheet.

Quarterly Review

Once the process becomes habit, step back once a quarter. Ask what improved, where opportunities still get stuck, what wins taught you, what losses taught you, what changed in the market, and what part of the process needs an adjustment.

What improved this quarter?

--

What am I doing better than three months ago?

Where are opportunities still getting stuck?

What did my wins teach me?

What did my losses teach me?

What part of my process needs an adjustment?

What is my main improvement focus next quarter?

Annual Reflection

Once a year, look further back. Compare the salesperson you are today with the salesperson you were twelve months ago.

Do not only ask whether you hit quota. Ask whether you became better, whether the system improved, whether you work smarter, whether relationships are creating more business, and whether you make better decisions.

The biggest way I improved this year:

The part of selling that became easier:

The biggest lesson I learned:

The mistake I am less likely to make now:

The strongest part of my process:

The weakest part:

What I added:

What I removed:

What needs to change next year:

Eventually, You Track Less

That is the destination. Not more tracking. Less.

You track intensely enough to learn. You learn enough to improve. You repeat enough to build the habit. Then the habit becomes part of the system.

CORE IDEA

**In the beginning: Work → Track → Learn → Adjust. As habits develop: Work → Review → Improve.
As the system matures: Execute → Reflect → Refine.**

The goal is not to become great at tracking sales. The goal is to become great at selling and let the system you built help keep you there.

Conclusion — This Is How You Sell

At the beginning of this book, the goal was simple: build a sales process that fits what you sell, who you sell to, how your customers buy, the complexity of the decision, and the way you sell best.

Now you have one.

You Built the System

We started with the overall process, then built the process inside each stage, then added the objectives, questions, actions, tools, exit criteria, and next steps that make it usable.

Advice Is Easy

Prospect more. Listen better. Ask good questions. Follow up. Build relationships. Create value. Ask for the sale. None of that is wrong.

But knowing what to do and knowing how you are going to do it are two different things. This book was built around the how.

Slow Down to Speed Up

Slow down long enough to target correctly, qualify correctly, understand the customer, build the problem gap, create priority, find the right people, understand the buying process, and build the right solution.

CORE IDEA

Slow down does not mean move slowly. It means do not skip the work that earns you the right to move fast.

You Are Supposed to Guide the Sale

You are not a passenger. Ask another question when more information is needed. Challenge an assumption when it needs challenging. Reposition the problem when the customer does not understand the priority. Bring in the right people. Ask for the next commitment. Ask for the sale.

Your job is not to pressure people. Your job is to provide direction.

Your Process Gets Better Because You Get Better

Every lesson can go back into the system. You lose a deal because somebody important was left out? Improve Map. A common objection keeps showing up? Improve Build. A qualification question saves months of wasted work? Put it into Qualify.

One lesson can improve every future opportunity. That is leverage. That is compounding.

The Red Knob on the White Stick

When you are unsure what to do next, go back to the process. Where am I? What am I trying to accomplish? What still needs to be learned? What has to happen next?

You have something to follow.

This Is How I Sell

That is what I want you to be able to say when you finish this book.

BUILD YOURS

I know who I should pursue. I know how I qualify. I know how I discover the problem. I know how I build the gap. I know how I position priority. I know who needs to be involved. I know how the customer buys. I know how to build value. I know how to ask for the next step. I know how to close. I know what happens after the sale. And when something stops working, I know where to look.

You built the process intentionally. Now use it. Improve it. Make it yours. And get better at sales.

My Customized Sales Process — Master Worksheet

Keep this simple enough that you can actually use it. This is your one-page roadmap expanded just enough to capture what matters.

1. TARGET: WHO SHOULD I PURSUE?

Identify → Prioritize → Research → Reason → Approach

My customized version:

My most important questions/actions:

I move forward when:

2. QUALIFY: IS THIS OPPORTUNITY WORTH MORE TIME?

Fit → Need → Ability → Timing → Buy-In → Next Step

My customized version:

My most important questions/actions:

I move forward when:

3. DISCOVER: WHAT IS REALLY HAPPENING?

Current State → Problem → Impact → Desired State → Problem Gap → Build Priority

My customized version:

My most important questions/actions:

I move forward when:

4. MAP: HOW WILL THE DECISION ACTUALLY GET MADE?

People → Influence → Motivation → Process → Obstacles → Access

My customized version:

My most important questions/actions:

I move forward when:

5. BUILD: HOW DOES MY SOLUTION CONNECT TO THEIR NEEDS?

Problem → Solution → Value → Proof → Objections → Business Case

My customized version:

My most important questions/actions:

I move forward when:

6. ADVANCE: WHAT IS THE NEXT COMMITMENT?

Recognize → Ask → Commit → Act → Follow Up → Resolve

My customized version:

My most important questions/actions:

I move forward when:

7. DELIVER & GROW: WHAT HAPPENS AFTER THE SALE?

Set Expectations → Follow Through → Communicate → Review → Anticipate → Grow

My customized version:

My most important questions/actions:

I move forward when:

My Biggest Strength:

How my process uses it:

My biggest sales weakness:

How my process protects me:

Where my deals most often get stuck:

What I will do differently:

My Main Improvement Focus Right Now

I will work on these for the next two weeks, then review what changed

My Final Process

Stage 1:
Stage 2:
Stage 3:
Stage 4:
Stage 5:
Stage 6:
Stage 7:

My Rule

KEY QUESTION When I am unsure what to do next, I will ask: Where am I in the process? What am I trying to accomplish? What still needs to be learned? What needs to happen next?
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THIS IS HOW I SELL
