**Sales – Template**

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| **1. Map out the sales cycle for a product or service by populating the cells below with activities corresponding to each stage.** |
| Receive inquiry | Click or tap here to enter text. |
| Qualify details | Click or tap here to enter text. |
| Arrange appointment | Click or tap here to enter text. |
| Customer appointment | Click or tap here to enter text. |
| Understand customer needs | Click or tap here to enter text. |
| Evaluate potential solutions | Click or tap here to enter text. |
| Present solutions and finalise the sale | Click or tap here to enter text. |

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| **2. Examine the type of selling activity in which your organisation engages and consider whether changes might be beneficial. For instance, what would the effect be of selling directly to consumers or to other businesses?** |
| Click or tap here to enter text. |

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| **3. Examine the sales cycle and methods that underpin the sales process.** |
| Click or tap here to enter text. |

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| **4. Examine the offering and consider its degree of complexity, whether it is a commodity, or if it can be sold as a subscription.** |
| Click or tap here to enter text. |

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| **5. Evaluate whether social media is, or can be used, to effectively communicate with clients and support the sales process.** |

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| **6. On the basis of your judgements in previous steps, determine actions to optimise the sales process or support activities.** |
| Click or tap here to enter text. |