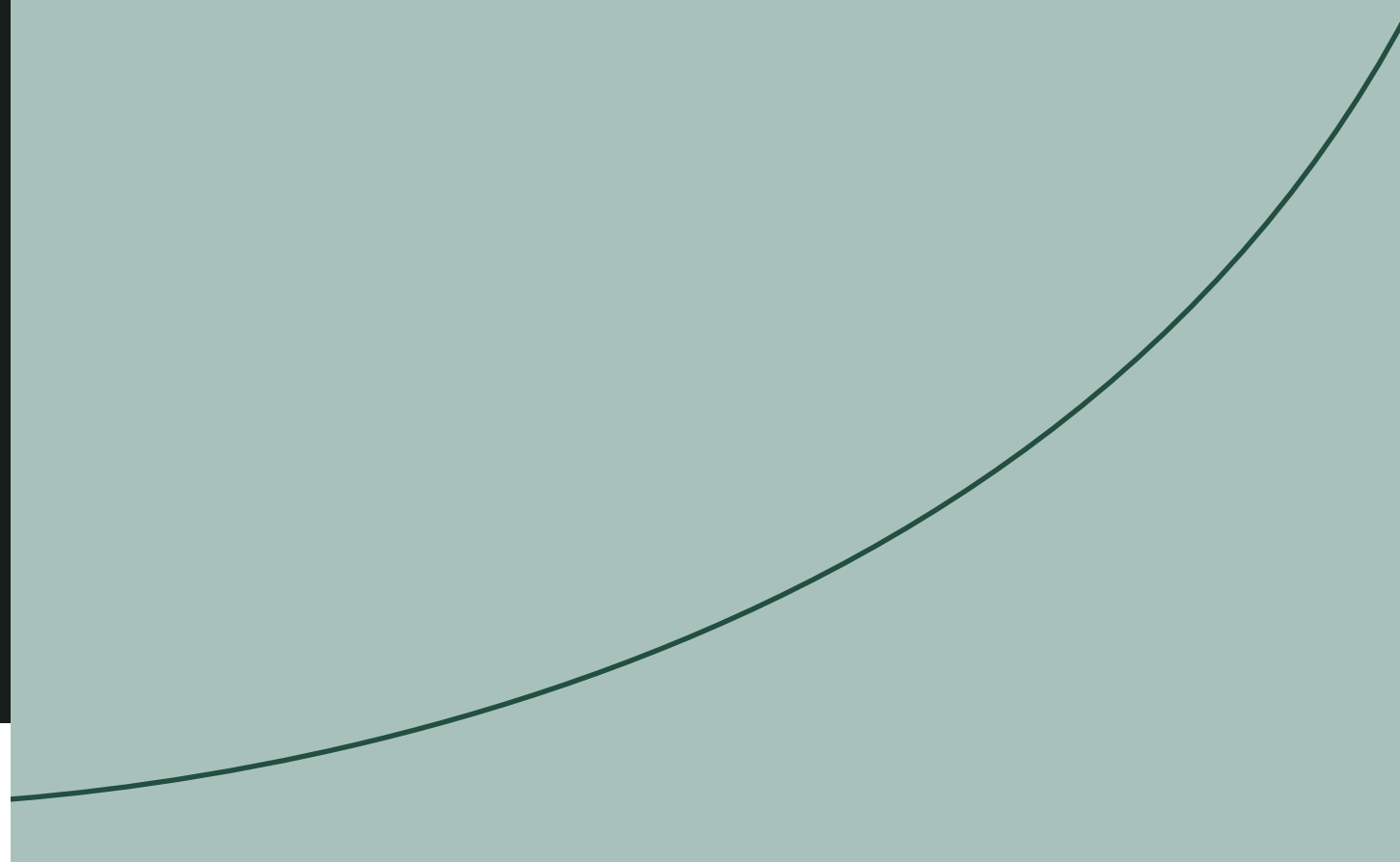


How we scaled this

Scaling the sales process

Series Vol. 3

Robert Koehler
GTM Advisor / Consultant



SCALE

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Key takeaways

Summary

Most early-stage companies struggle to repeat a sales process that leads to consistent revenue and outcomes. Instead, sellers work in an ad-hoc manner, and best practices for engaging buyers live in the heads of the founders, a few executives and early sellers. Lacking a documented easy-to-follow sales process, new reps continue with the ad-hoc approach.

Without clear documentation of the buyer's decision-making process, reps struggle to determine the most effective path to deals. In turn, they are challenged to move deals forward as quickly as possible and confidently forecast revenue.

I've encountered this situation in countless early-stage companies. **By surfacing and addressing five common challenges, I've empowered these companies to consistently advance opportunities and produce more reliable revenue forecasts.**

It's no wonder: research from the likes of the Harvard Business Review shows that businesses with a standardized sales process see up to 28% higher revenue compared to those that do not.

About the author

Robert Koehler excels in building repeatable revenue models—calling upon his successes launching world-class sales processes for over forty companies (including renowned companies like TOPO, LinkedIn, and IBM). He's also brought this same sales expertise to numerous start-ups.

Most recently as Director of Sales Effectiveness, Robert built the sales process for Compass, which scaled the sales organization 400%. Compass grew revenue from \$800M plus to over \$3.2B in three and a half years. As a GTM Consultant for Scale, Robert guides companies on their revenue strategy.

Overview and results



Challenge

Companies rely on ad hoc, undocumented or overly complicated sales process



Solution

A consistent, repeatable approach aligned with the buyer process and six key steps:

- 1 Define clear stages in a concise sales process
- 2 Align sales stages with the buyer journey
- 3 Frame buyer-centered sales objectives
- 4 Highlight key sales steps
- 5 Clarify exit criteria to move deals forward
- 6 Tie sales stages to forecasting stages



Results

Reduced deals dropping out of funnel by ~18%



Target

SMB,
Strategic enterprise



Product

SaaS SEO
platform



ACV

\$25—
300K

~18%

Less deals
dropping out
of funnel.

Define clear sales stages in a one-page sales process

An actionable, repeatable sales process defines clear sales stages for how to proceed.

How we did it

We reviewed the company's documented sales processes and available metrics on:

Deal size

Sales cycle time

Number of stakeholders in the buying process

Win rate

Then, we interviewed sales leadership and top sellers to understand a typical closed-won engagement and where deals get stuck.

What we did

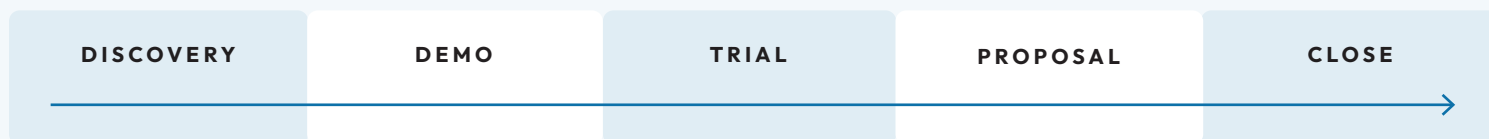
Made discovery and demo two distinct stages

Eliminated stages related to administrative processes such as updating the CRM

Reduced eleven documented stages to five

Documented four-slide sales process on one, easily digestible page

Diagram: Repeatable sales process model



Results

- + Increased discovery
- + Reduced generic demos
- + Increased conversion rates

Why it worked

A simple visual roadmap increased usability. Splitting discovery and demo into two stages **empowered sellers to execute each more effectively.**



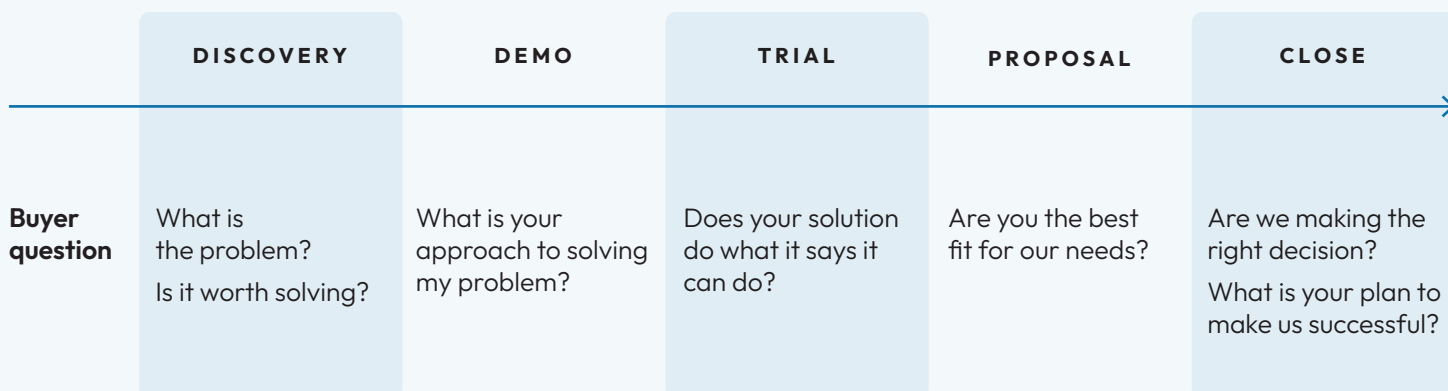
Top tip

Avoid artificially condensing stages or including more than six stages in your sales process.

Align each stage of the sales process to the buying process

During each stage of the buying process, the buyer is typically trying to answer a key question that sellers should help them answer.

Diagram: Buyer questions



How we did it

We interviewed sales, marketing and product management to map the buying process.

What we did

- + Converted answers into key questions the buyer is trying to answer throughout their journey
- + Made the primary buyer question the first component of every sales stage
- + Ensured sellers aligned the purpose of each meeting to the buyer's typical questions at that stage

Results

- + Factored the buying process into forecasting
- + Shifted reps to prioritizing the buyer problem over their solution

Why it worked

By aligning with the buyer, **sellers could be more relevant and match their actions to buyer needs.**



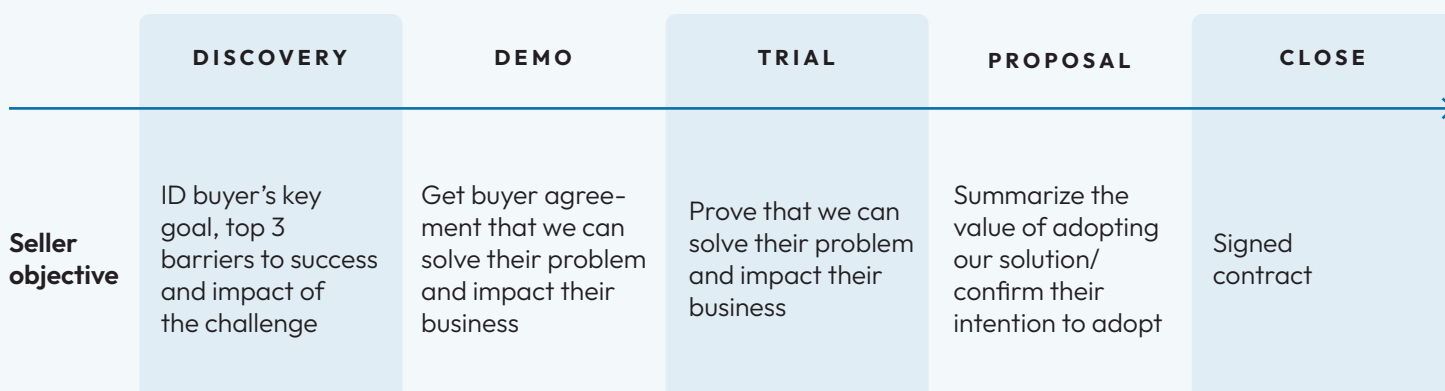
Top tip

Tie sellers' objectives to the buying process so they engage accordingly and your forecast is not based solely on seller actions.

Map seller objectives to buyer concerns

For each stage, it's important to note the sales team objective tied to the buyer's key question.

Diagram: Seller objectives



How we did it

We interviewed sales, marketing and product management to map the buying process.

What we did

We reframed objectives in more specific, buyer-centric terms.

Results

- + Increased pre-meeting planning
- + Improved quality of discovery questions

Why it worked

Sellers thought more intentionally about:

- + Each meeting's goal
- + What they needed to accomplish with the buyer to meet the goal



Top tip

Drive sales focus on the outcomes rather than specific tasks.

Highlight key sales steps

An adoptable sales process clarifies the primary actions throughout the sales cycle.

Diagram: Key steps

	DISCOVERY	DEMO	TRIAL	PROPOSAL	CLOSE
Key steps	<div>1 Research account</div> <div>2 Confirm qual criteria</div> <div>3 Ask discovery questions</div>	<div>1 Discovery recap</div> <div>2 Brief preso</div> <div>3 Demo</div>	<div>1 Trial kickoff</div> <div>2 Checkpoint meetings</div> <div>3 Trial impact meeting</div>	<div>1 Proposal meeting</div> <div>2 Close plan</div>	<div>1 Signed contract</div> <div>2 Customer success handoff</div>

How we did it

We interviewed sellers and sales leaders and listened to call recordings.

What we did

Broke down the stage components and prioritized the 2-3 most important steps.

Results

- + Greater sales buy-in and consistent execution of the sales process
- + Higher satisfaction with onboarding



Why it worked

Highlighting 3 key steps max and matching them to stages **made it simpler to identify the key skills and meetings to be mastered.**



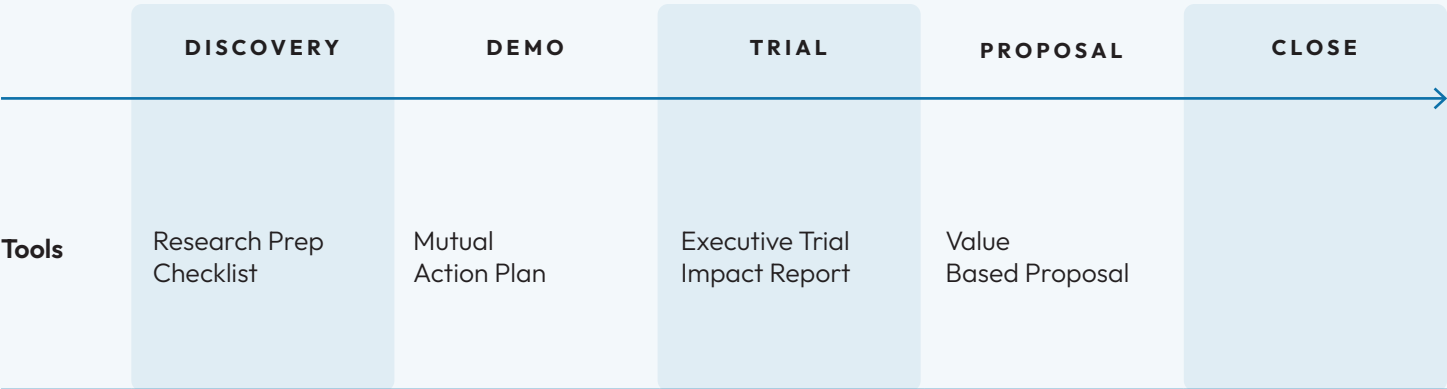
Top tip

Focus on the most common steps that happen in every sale. Avoid outliers.

Identify critical sales tools

An internal or external tool supports each sales stage.

Diagram:
Tools



How we did it

We reviewed the frameworks and tools used to support buyers and sellers at each stage.

What we did

- + Created a checklist for identifying key topics to research and how to apply the information in under ten minutes
- + Moved the Mutual Action Plan earlier in the sales process to improve deal command and forecasting
- + Built an end-of-trial Executive Impact Report to show value and increase trial conversion rates
- + Rebranded ‘Quotes’ to ‘Value Based Proposals’ to emphasize executive summaries, business value, and tying solutions to critical buyer outcomes

Results

- + Sales tool usage increased by over 33%
- + The sales team used consistent terminology and tools such as the Value Based Proposal across all regions, territories and teams



Why it worked

Tools made each stage more tangible.

We helped sellers see the relationship between using tools and improving execution



Top tip

Implement and train on one primary tool per sales stage.

Move deals forward based on outcomes

When sellers focus on meeting objective exit criteria, their next steps better align with the buyer's place in the evaluation process.

Diagram: Exit criteria

	DISCOVERY	DEMO	TRIAL	PROPOSAL	CLOSE
Exit criteria	<ol style="list-style-type: none"> 1 Buyer confirms goals, challenges and impact 2 Seller documents buyer's three main goals or challenges and their impact 3 Demo scheduled and accepted 	<ol style="list-style-type: none"> 1 Buyer confirms they believe we can solve their issue 2 Buying process shared & initial MAP completed 3 Conditional close confirmed as part of scheduled trial kickoff meeting 	<ol style="list-style-type: none"> 1 Trial Executive Impact report delivered to decision makers 2 Champion confirms no barriers to adoption 3 Proposal meeting scheduled & accepted 	Internal purchase approver agrees verbally and in writing to close plan and commercial terms	Buyer accepts scheduled kickoff meeting

How we did it

We asked sales operations leaders how they know if an opportunity should move to the next sales stage, and identified areas where the company invested significant time and resources on the wrong opportunities.

What we did

- + Created “exit criteria” — a limit of three — for each sales stage, i.e., objective, observable actions taken by both the buyer and the seller
- + Trained sales managers on coaching to exit criteria/outcomes instead of sales activities
- + Implemented “hard gates”, i.e., exit criteria that had to be met to obtain resources. For example, to get a solution architect for a trial, sellers had to provide a copy of a trial success plan signed by the buyer

Results

- + Fewer resource-draining trials
- + Trial conversion rate rose 25%
- + Fewer proposals
- + Proposal win rate increased over 20%
- + Significantly fewer deals lost to ‘no decision’
- + Forecasting accuracy increased in the first two quarters by over 8%

Why it worked

Sales couldn't be as subjective in assessing an opportunity stage. Buyers were continually qualified throughout the sales process by objective criteria.



Top tip

Manage your sales process according to outcomes, not activities.

Tie sales stages
to the forecast

A well-defined sales process — based on consistent steps, tools and exit criteria allowing for individual seller styles — improves forecasting.

Diagram: Forecast



How we did it

We identified how sales leaders forecasted opportunities to gauge forecasting consistency and alignment to the Chief Revenue Officer’s (CRO) vision.

What we did

- + Aligned forecasting more to opportunity stages vs. seller confidence
- + Defined and added standard forecasting guidelines for each stage
- + Adjusted the pre-defined forecasting categories in the CRM
- + Aligned to forecasting guidance based on categories — ‘pipeline’, ‘best case’, ‘commit’ and ‘closed won’ vs. percentages (e.g., trial = 50%)

Results

- + More consistent forecasting
- + Avoided assigning arbitrary percentages to deals
- + Forecasting accuracy improved over 8% in the first two quarters after implementing the new sales process

Terms

Pipeline	The buyer is in the early stages of the buying process still defining the problem or the solution approach
Best case	We have nailed the ‘Big 3 Opportunity Matrix’, there is an agreed to MAP
Commit	The MAP or ‘close plan’ is being followed and we are confident that the opportunity will be successfully closed
Closed won	The deal is won. No further sales action is required to ensure the deal closes or to ensure revenue



Why it worked

Aligning opportunity stages to the forecast gave leadership more confidence in forecasting accuracy, **while still giving sellers the flexibility to factor in 'sales confidence' in extenuating circumstances.**



Top tip

Tie the sales process to the buying process for confidence that forecasting will be more accurate than if done by simply equating sales process stages with strict percentages.

Diagram: the repeatable sales process

	DISCOVERY	DEMO	TRIAL	PROPOSAL	CLOSE
Buyer question	What is the problem? Is it worth solving?	What is your approach to solving my problem?	Does your solution do what it says it can do?	Are you the best fit for our needs?	Are we making the right decision? What is your plan to make us successful?
Seller objective	ID buyer's key goal, top 3 barriers to success and impact of the challenge	Get buyer agreement that we can solve their problem and impact their business	Prove that we can solve their problem and impact their business	Summarize the value of adopting our solution/confirm their intention to adopt	Signed contract
Key steps	1 Research account 2 Confirm qual criteria 3 Ask discovery questions	1 Discovery recap 2 Brief preso 3 Demo	1 Trial kickoff 2 Checkpoint meetings 3 Trial impact meeting	1 Proposal meeting 2 Close plan	1 Signed contract 2 Customer Success handoff
Tools	Research Prep Checklist	Mutual Action Plan	Executive Trial Impact Report	Value Based Proposal	
Exit criteria	1 Buyer confirms goals, challenges and impact 2 Seller documents buyer's three main goals or challenges and their impact 3 Demo scheduled and accepted	1 Buyer confirms they believe we can solve their issue 2 Buying process shared & initial MAP completed 3 Conditional close confirmed as part of scheduled trial kickoff meeting	1 Trial Executive Impact report delivered to decision makers 2 Champion confirms no barriers to adoption 3 Proposal meeting scheduled & accepted	Internal purchase approver agrees verbally and in writing to close plan and commercial terms	Buyer accepts scheduled kickoff meeting
Forecast	Pipeline	Pipeline	Best case	Commit	Closed won



Key takeaways



Differentiate through not just what you sell but how you sell

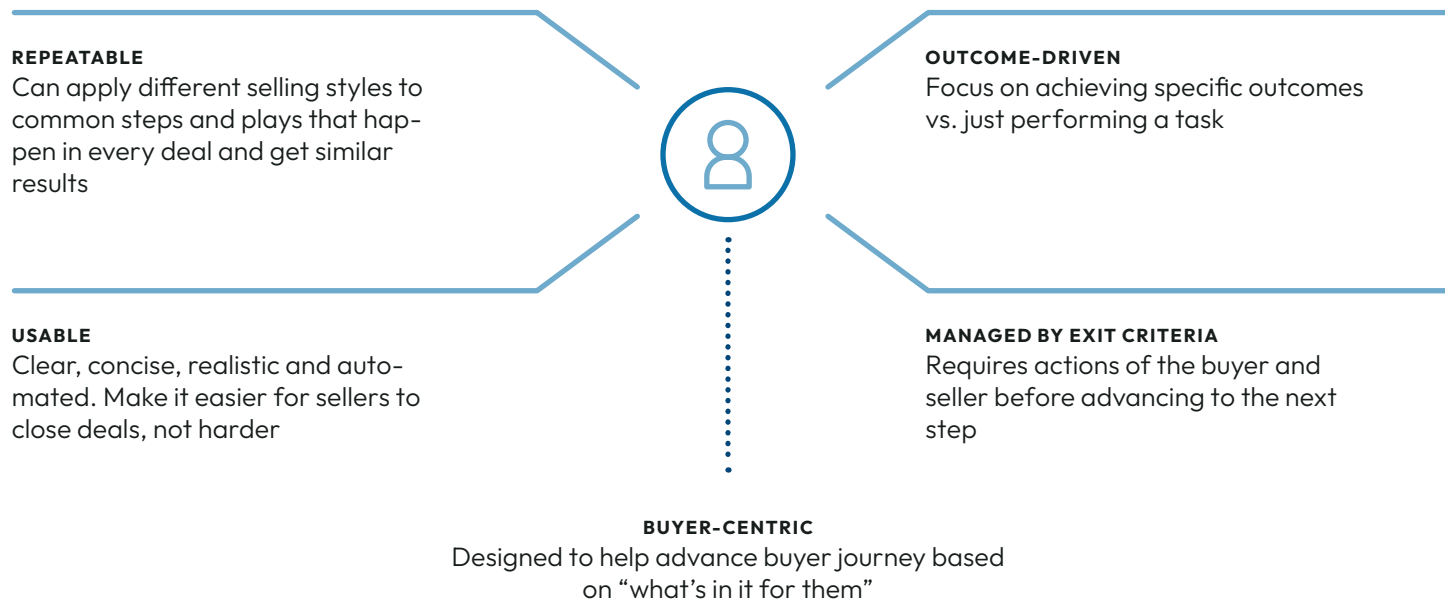


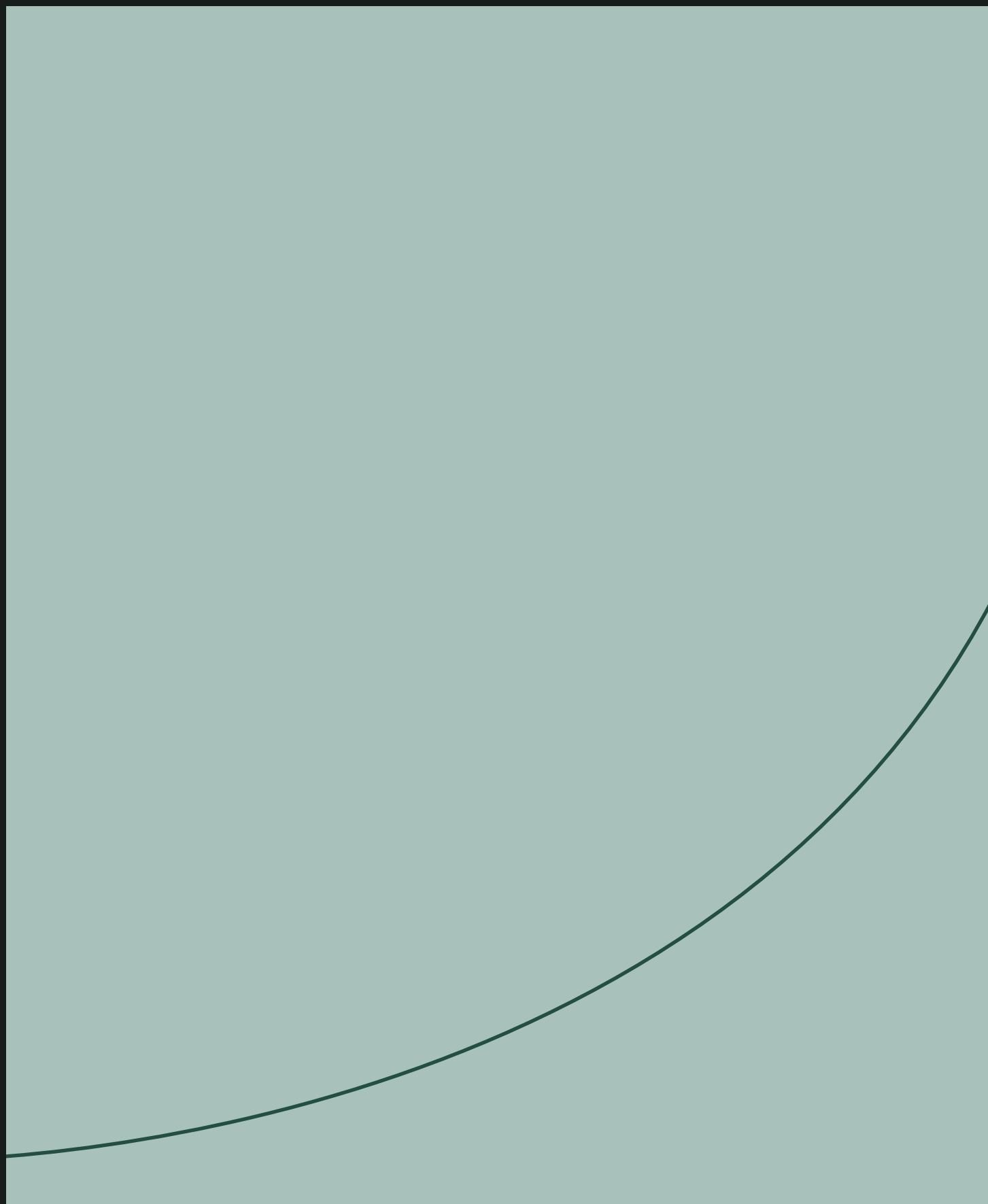
Streamline the sales process with a focus on outcomes, not activities



Sync next-best sales actions with where the buyer is in the decision-making process

Adhere to the following framework to develop a sales process:





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