Sales Process Builder.

Need help? Watch the lesson.

Define your sales process with this interactive worksheet. Most advisors do not have an intentional process to move lead to client, and client to advocate. Be more consistent, effective, and efficient in your business development, onboarding, and client service efforts.

Start here → 1 2 3 4 5

BUYER MINDSET	STAGE NAME	MILESTONE(S)	TACTICS / PROCESSES	METRICS	OWNER(S)
A client-centric approach	Name key stages in your sales process. Use these (or rename) in your CRM and internal conversations.	Define what success is at each stage?	Define tactics to accomplish milestones. Document and train each tactic/process, automate where possible.	Define leading and lagging indicator(s). Use your CRM to track and report.	Every tactic and/or process has an owner.
Aware	LEAD				
Considering	PROSPECT				
Preference	PROPOSAL SENT				
Decision	WON / LOST				
Advocate	ADVOCATE				

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Sales Process Builder Best Practices.

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Aware	**LEAD**	They provide their name and email (or you're given name)	› Offer a gated value-add › Contact us form/email	Leading: # of "leads" (total and by source) Lagging: Lead to prospect conversion rate (% leads that you meet)	› Marketing owner
		Book an intro meeting	› Define lead follow-up › Use an online scheduler › Always offer a next step		› Calendaring system › Follow-up owner
Considering	**PROSPECT**	Complete intro meeting	› Define an ideal intro meeting (prep, during, follow-up)	Leading: Pipeline value ($) Lagging: # of booked second meetings or won	› Advisor
		Qualify the opportunity	› Define what "qualified" means and capture in CRM › Define unqualified process		› Advisor
Preference	**PROPOSAL SENT**	Provide personalized value to support decision making process: provide evidence of "why us," quarterback next steps, and address concerns	› Deliver personalized evidence (i.e. proposal) › Prospect follow-up for final meeting or decision	Leading: # of proposals sent Lagging: % client conversion (met with to client)	› Advisor › Proposal developer
			› Prospect follow-up process, final meeting or decision		› Follow-up owner
Decision	**WON / LOST**	Verbally commit and sign advisory agreement	› Onboarding process	Leading: Completion of onboarding tasks vs. expectations Lagging: Client's satisfaction following onboarding	› Support staff/advisor
Advocate	**ADVOCATE**	Receive referrals from client and/or high satisfaction rating	› Segmentation › Client service model	Leading: Proactive, personalized activity Lagging: # of referrals, high satisfaction rating, or walletshare	› Advisor/support staff

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