

How to Choose the Right CRM

A SALES
WORKBOOK



SALES PROCESS WORKBOOK OUTLINE

This is a Sales Process workbook designed to help business owners build effective sales processes for acquiring and retaining customers.

Objectives of this Workbook:

Enable business owners/sales teams to map out the sales processes their businesses require.

1. Introduction

- What is a Sales Process?
- Why is a Sales Process Important?

Sales Stage	Description	Your Notes/Inputs
Prospecting	Identifying potential customers to target	
Preparation	Researching and planning how to approach the prospect	
Approach	Making initial contact with the potential customer	
Discovery	Find out finer details regarding the client in alignment with Ideal Profile	
Presentation	Demonstrating your product/service and its benefits	
Handling Objections	Addressing concerns or barriers to purchasing	
Closing and Follow-up	Finalizing the deal and maintaining communication	
Repeat Sales & Referrals	Encouraging future purchases and customer referrals	

II. Defining Your Target Audience

What is an Ideal Customer Profile: Detailed description of the customer whose needs can be met by your product or services. It outlines the characteristics of the most promising customers

ICP Category	Description	Examples/Prompts	
Sociographic	Organizational attributes	Industry, revenue, number of employees, organizational structure	
Demographic	Personal attributes of decision-makers or consumers	Age, gender, location, business size	
Behavioral	Buying behavior and preferences	Lifestyles, values, purchasing behaviors	
Geographical	Location-based traits	Region, climate, urbanicity, frequency of travel	
Product Use	Relationship with your product/service	Repeat purchase, upsell/cross-sell potential, likelihood to refer	

- Identifying Ideal Customer Profiles - customized examples of ICP's to your specific business

Demographics	Goals & Pains	Motivations & Attitudes

III. Building the Customer Acquisition Process

What is an Ideal Customer Profile: Detailed description of the customer whose needs can be met by your product or services. It outlines the characteristics of the most promising customers

Qualification Factor	What to Look For	Prompt Questions	Your Notes/Inputs
Need	Does the prospect have a clear need for your product/service?	<ul style="list-style-type: none">- What problem are they trying to solve?- How are they currently handling it?	
Authority	Is the person you're speaking with the decision-maker?	<ul style="list-style-type: none">- Who makes the final decision on purchases?- Is anyone else involved in the approval process?	
Budget	Do they have a budget allocated for this solution?	<ul style="list-style-type: none">- Do you have a budget range in mind?- Has funding been approved?	
Timing	What is their buying timeline? Is solving this problem a priority right now?	<ul style="list-style-type: none">- When would you ideally want to implement a solution?- Are there internal/external deadlines driving this?- What happens if this isn't addressed?	

- **Wishlist:** list of potential customers

- **Prospecting:** MBG

Methods of connecting with the potential customers (e.g. cold calling/visits, networking at events, referrals)

Method	Applicable? (✓/X)	Notes/Ideas
Cold Calling		
Referrals		
Networking Events		
Linkedin Outreach		
Walk-ins		

- **Engaging and qualifying leads by assessing their needs:**

Engaging strategies: Building trust.

Qualifying by understanding the customer and matching their needs to your solution.

Step	Objective	Guidelines/ Strategies	Prompt Questions	Your Notes / Inputs
1. Initial Engagement	Create connection and openness	<ul style="list-style-type: none"> - Use warm introductions (if possible) - Be genuinely curious about their business - Ask open-ended questions - Mirror their communication style 	<ul style="list-style-type: none"> - "Tell me more about your business." - "What are your biggest goals this quarter?" 	
2. Building Trust	Establish credibility and comfort	<ul style="list-style-type: none"> - Share success stories/testimonials - Offer helpful insights up front - Be transparent (don't oversell) 	<ul style="list-style-type: none"> - "Would you be open to a quick story of how we helped a similar business?" - "What would success look like for you?" 	
3. Uncovering Needs	Understand core pain points	<ul style="list-style-type: none"> - Ask discovery questions - Let them talk more than you - Avoid assuming too quickly 	<ul style="list-style-type: none"> - "What challenges are slowing your growth?" - "What's currently not working with your solution?" 	
4. Qualifying Fit	Match their need to your offer	<ul style="list-style-type: none"> - Check for fit with your ICP - Be honest if it's not a match - Position your solution as a response to their unique problem 	<ul style="list-style-type: none"> - "If we could help. you solve [pain point], would that be worth a conversation?" - "Is this something your team is actively looking to fix now?" 	

- **Education/Demo:**

Presenting your solution as a response to their needs
Conducting Product/Service Demos

- **Making a Sale:**

Handling Objections
Negotiating
Closing Techniques

- **Onboarding customers:**

Ensuring a Smooth Transition
Providing Initial Support and Resources

IV. Customer Retention and Growth (Account management/Customer success)

- **Managing and Growing Relationships:**

Regular and consistent customer follow-ups including value ads:
Sharing market insights that benefit the customer.

Provide Ongoing Support on the products or services that you provided the client.

Action	Purpose	Strategies	Example Prompts/Tips	Your Plan / Notes
Regular Follow-ups	Stay top of mind with clients	<ul style="list-style-type: none">- Monthly/quarterly check-ins- Account health reviews	<ul style="list-style-type: none">- "Just checking in- how are things going with [product/service]?"- "Any new goals we can support?"	
Value- Added Sharing	Deepen value by offering insights	<ul style="list-style-type: none">- Share industry trends- Offer tips that improve their business	<ul style="list-style-type: none">- "Here's a new trend report that could impact your market."	
Personalized Service	Make clients feel special	<ul style="list-style-type: none">- Custom support- Tailored offers	<ul style="list-style-type: none">- "Based on your goals, we thought you'd love this new feature..."	

- **Gathering Feedback:**

Surveys and Reviews

Addressing Customer Concerns

- **Upselling and Cross-selling:**

Identifying new opportunities that your additional products and services can meet (Sales)

Opportunity	Identification on Strategy	Approach	Example Prompts/Tips	Your Plan / Notes
Upselling	When customer's needs have grown	- Offer premium/expanded packages	- "You've grown a lot - would you be interested in exploring [higher-tier service]?"	
Cross-selling	When they have other needs you can solve	- Suggest complementary services	- "Many clients using [product A] also benefit from [product B]. Want to see if it fits?"	

- **Building Customer Loyalty:**

Loyalty Programs and Incentives

Initiative	Goal	How To Set It Up	Example Ideas	Your Plan / Notes
Loyalty Programs	Reward repeat customers	<ul style="list-style-type: none"> - Points systems - VIP client perks 	<ul style="list-style-type: none"> - Exclusive discounts for 1-year clients - Free trainings after purchase 	
Personal Thank Yous	Deepen emotional connection	<ul style="list-style-type: none"> - Handwritten notes - Personalized gifts 	<ul style="list-style-type: none"> - "Thanks for being a valued client for 2 years - here's a small token of appreciation!" 	
Customer Communities	Foster belonging	<ul style="list-style-type: none"> - Create online communities (WhatsApp, Facebook and LinkedIn groups) 	<ul style="list-style-type: none"> - "Join our exclusive community where we share insights and client - only offers." 	

V. Tracking and Measurement

- **Key Performance indicators (KPIs)**

Time to acquisition/Sales cycle (Days, weeks, months)

- **Using Data to Improve the Sales Process**

- **Sales Process Template?**

KPI	Current Value	Target Value	Notes
Sales Cycle Length	21 days	14 days	Optimize demos & follow-ups
Conversion Rate	15%	25%	Improve qualification
Retention Rate	70%	85%	Add quarterly check-ins

VI. Resources and Tools

Templates and Checklists (ICP/Pain points/Sales Process)

Software and Technology

Further Reading and Training

VII. Action Plan

Steps to Implement the Sales Process

Setting Goals and Timelines-Part of Wider Annual Sales Planning Process

Review and Refinement

Goal	Action Steps	Timeline	Owner
Increase monthly sales by 30%	- Train reps on objection handling	May - July	Sales Lead
Shorten sales cycle to 14 days	- Create follow-up templates	Ongoing	Sales Rep
Build 20 ICP - targeted leads/month	- LinkedIn search & warm outreach	Weekly	BDR

VIII. Conclusion

This outline will help guide business owners in creating a comprehensive sales process. Each section can be further expanded with detailed instructions, examples, and templates to make the workbook practical and effective.

- Edward Ndegwa (Mwalimu wa sales)