Strengthen your sales framework

This checklist will help you to establish some priority actions to improve consistency and effectiveness of your sales framework and methodology. It's not an exhaustive list but will highlight the process to develop your own approach. Top tips are noted with a

1. Objectives and goals

Start with 'why'. Be clear on what improvements you want your sales framework to deliver. Quantify the change and decide how you will monitor progress and measure outcomes.

Ensure you've engaged and agreed objectives with all relevant sponsors and stakeholders. Without exec-level buy-in, it's difficult to embed and operationalise your changes.

2. Fine-tune your framework

This is the foundation for developing a consistent approach so it's important to get it right.

1. Map the stages in the customer's buying journey. Summarise the key activities the customer typically undertakes (internally and externally) at each stage.
2. Align your sales stages to the customer's stages.

   Start by overlaying your CRM forecast stages and see if they align to the customer stages.

   You may need to adapt your stages to better align to the customer's journey. This will help you to better identify your true status and improve forecasting accuracy. Stages will map to clear customer choice and decision points.
3. List for each stage
   - The key activities you need your sales team to perform
   - The people resources they should involve
   - The collateral available to support them
4. Define the exit criteria (i.e what needs to have happened) to move from one stage to the next.

Want to go faster?

Contact us to request our framework template in Excel.

Want to go even faster?

Our clients get

A pre-populated tech B2B template

Facilitation to quickly tailor the framework for their unique business and CRM.

Best practice guidance, job-aids and examples

3. Implement a common methodology

Having a common set of definitions, tools and models is key to creating consistency.

You may want to integrate methodologies already in use in the business. if so, make them formal and consistent.

Your methodology may include as much or as little as you need. For instance, how to qualify an opportunity, what a good 'discovery' meeting or demo looks like, at what stage(s) to conduct a demo and who should be there, how to create a winning proposal.

Define common language and definitions for the important things. For instance, what are the roles in the decision making process and how are they defined?

We use just 5 roles and 5 stances, all with very clear definitions, to build out visual stakeholder maps. These are transformative if you are often single-threaded or wrong-footed by competitors or politics in accounts.

4. Embed and operationalise for lasting change

Operationalising your approach is essential to make long-term change that is not dependent on a few individuals.

- Document and then train and coach your teams in the framework and associated methodology. This should focus on **Knowledge** of the new ways of working, the **Skills** needed to follow the approach and developing the **Mindsets** that embrace change and growth. A blended approach over time is usually most effective.
- Review your CRM. This can feel painful but there are often quick wins to be had and the impact can be significant. Deliver consistent CRM usage with clear processes.
- Work closely with other teams that feed into and out of sales to ensure handovers are seamless and in-line with your customer journey and framework. This can pay dividends in lead conversion, customer experience, expansion and retention.
- Measure progress along the way using pre-defined metrics.
- Embed your approach into new starter induction programmes to accelerate new sales people to deliver revenue faster.

Want to go faster?

Our clients benefit from a suite of ready-made definitions, tools and models that can all be easily tailored.

We facilitate and co-ordinate internal stakeholders to develop the definitions that work for you.

Our blended, and tailored sales enablement training programmes are proven to fast-track behaviour and mindset change.

Embedding in Salesforce?

Through our partnership with Point N Time, we have a native Salesforce plug-in that supports strategic account development customised to your framework and methodology.

Want to fast-track your growth?

Accelerate sales growth

Our clients are all looking to grow. Their focus often spans these common goals:

- Scale growth with limited resources — nationally or internationally
- Drive strategic revenue growth into new markets, products or services
- Speed up partner enablement and alignment
- Move from transactional to value-led partnerships
- Integrate sales teams post M&A to increase cross-portfolio sales
- Develop a company-wide, repeatable sales process to connect sales execution to business strategy

Clients

Credentials

How we make an impact

PREPARE IMPROVE PERFORM

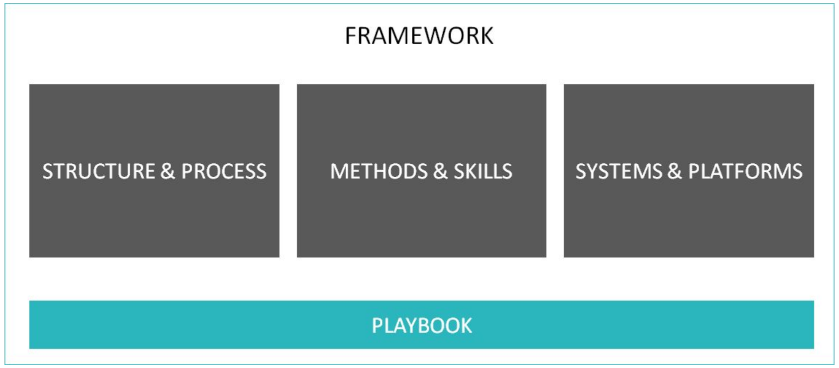
We genuinely tailor our programmes to your goals and objectives, your customer buying journeys, your culture and your business.

We begin with the end in mind. Our shared focus is on developing the capability needed to deliver measurable outcomes against your goals.

Using our proven framework, we identify and focus on the things that will make the difference, not methodology for the sake of methodology.

We follow a tried and true approach, including practical consulting, development, training and coaching, which turns our work into your results.

We operationalise your methodology to make it 'business as usual'



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