Sales Guide Template

[PREP EMAIL TEMPLATE](#_31pshpa0i4to) **2**

[**INTRODUCTIONS**](#_elh9ruf8u5ks) **3**

[**SALESPERSON ROLES**](#_v8wfwvfdrm7n) **4**

[**SHORTHAND**](#_gekfmgvj8bdb) **5**

[**FREQUENTLY ASKED QUESTIONS**](#_xuymyqz2qks7) **6**

[**COMMON OBJECTIONS**](#_tmr781b2u6t9) **7**

[**NEXT STEPS**](#_4ignabcyhzyz) **8**

[**INFLECTION POINTS**](#_t3bvvkn71kar) **9**

[**ELEVATOR PITCH**](#_tg1navr2h9zb) **10**

[**ASK THEM TO BUY**](#_784kkwvd2go6) **11**

[**FOLLOW UP CHECKLIST**](#_n159a5l1rujk) **12**

[**FOLLOW UP EMAIL TEMPLATE**](#_ea9jcx3j8mph) **13**

[**TRIAGE**](#_3j66vnfrl6b7) **14**

| PREP EMAIL TEMPLATESend this out before the call so you never have a no show. |
| --- |
| **Subject** | <<date of meeting>> <<company name>> & <<client name>> Agenda |
| **Body** | Hi <<name>>,I’m looking forward to speaking to you <<time date>> at <<location or video conference link>>. I have a few points for our agenda:Is there anything else we should discuss?Kind regards,<<your name>> |

##

| INTRODUCTIONSPractice a clear introduction to frame and take control of the conversation. |
| --- |
| **Personal Intro** | Hi, I’m <<your name>>. I’m the founder of <<company name>> and I have a background in <<topic>>. |
| **Company Intro** | We’re a startup team of <<number>> people making it easier to do <<problem statement>>.I’m happy to help however I can. If I can understand your goals, then hopefully we can help you. If not, I am not going to pitch you something that doesn’t work. I’ll try and suggest a better solution somewhere else.Do you mind if I ask you a few questions before getting into the details of our solution? |

##

| SALESPERSON ROLESDefine sales roles clearly so everyone knows their tasks. |
| --- |
| **Lead** | * Ask the questions
* Respond to the customer
 |
| **Support** | * Take notes
* Reflect key points
* Ask the questions the lead forgot
* Prompt with next steps
 |

##

| SHORTHANDUse this shorthand to make notes more easily searchable. |
| --- |
| ###  | Action item |
| \*\*\* | Objective or goal |
| !!!  | Pain point or obstacle |
| ???  | Follow up or unanswered question |
| %%%  | Metric or impact |
| $$$ | Important advice or value |
| +++ | Something that went well or good for the retro |
| ---  | Something negative or something that didn’t go well for the retro |
| ∆∆∆ | Suggested change for the retro |

| FREQUENTLY ASKED QUESTIONSReview these answers so you always know what to say. |
| --- |
| **What are your prices?** | * Depends on how many licenses.
* How are you planning on using the solution?
 |
| **How big is your company?** | * We have over a hundred engineers focused on this product alone.
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##

| COMMON OBJECTIONSReview how to overcome objections so you always know what to say. |
| --- |
| **We would never do business with a startup.** | * Have you ever done business with a startup before?
* Are there any non-startups effectively solving this problem?
 |
| **Your competitors have a much bigger user base than you.** | * Yes, you would be our biggest focus as a client.
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##

| NEXT STEPSPrepare a list of next steps to refer to as you close the sales call. |
| --- |
| **For Us** | * **DO NOT AGREE TO SEND A PROPOSAL** (unless full conceptual agreement)
* Send a flyer
* Schedule a demo
* Send a test license
 |
| **For Them** | * Legal / Procurement
	+ Start NDA
	+ Start vendor Listing process
	+ Procurement Questionnaire
* Introductions to other stakeholders
* Project information
	+ Budget estimate
	+ Timing
	+ Project information
 |

| INFLECTION POINTSListen for these phrases to know when to switch to pitching. |
| --- |
| * If you could solve this, it will be a game changer in our business.
* When can you deliver?
* What if we want to upgrade?
* How do you manage support?
 |

| ELEVATOR PITCHHave a clear description of your product and your value proposition |
| --- |
| Our product <<number>> allows you to <<solution statement>> by:* <<key feature>>
* <<key feature>>
* <<key feature>>
 |

##

| ASK THEM TO BUYUse these questions to ask for the sale and close the deal |
| --- |
| * “We have several options, is there one in particular you would like to move forward with?”
* “I don’t have any further questions and am confident these options work well for you. Would you like to discuss purchasing our solution?”
* “Do you have any other questions for me before we discuss purchasing?”
* Unless you have any other questions for me, I’d like to discuss purchasing our solution.
 |

##

| FOLLOW UP CHECKLISTEnsure you use all the information from the sales call effectively. |
| --- |
| * **Run a retrospective**
	+ Take one minute to run a retrospective and pick one thing to improve for your next sales call.
* **Debrief the call or a win/loss**
	+ Capture any notes for the next call.
	+ Capture any insights that might help your team.
* **Send Follow Up Notes**
	+ Ensure that everyone agrees on next steps to make sure you and the customer are aligned.
* **Qualify or Disqualify the lead**
	+ Decide to pursue or not pursue the lead.
* **Update the CRM**
	+ Keep your CRM updated so that you prioritize leads correctly and remember to follow up.
* **Update Buyer Personas & Marketing Channels**
	+ Use any information gathered to improve your marketing process and help identify better leads in the future.
* **Record Experiment Results**
	+ If there are experiments running, make sure the right information is recorded.
* **Triage the sales call**
	+ If the lead is stuck, attempt to identify reasons based on the symptoms and improve your triage guide.
 |

| FOLLOW UP EMAIL TEMPLATESend this out after the call so you have alignment on next steps.. |
| --- |
| **Subject** | <<date of meeting>> <<company name>> & <<client name>> Follow Up Notes |
| **Body** | Hi <<name>>,Thanks for taking the time to talk today. Based on our conversation, I took some notes for my own use which I'll abbreviate here.Action ItemsNotes* Objectives
* Metrics for Success
* Obstacles
* Remaining Questions
	+

Did I miss anything?Cheers,<<your name>> |

| TRIAGEIdentify reasons based on the symptoms and improve your triage guide. |
| --- |
| **Name** | **Symptoms** | **Root Cause** | **Next Steps** |
| **Never Ending Beta** | * Customer requests additional demos
* Customer requests additional features
* Customer requests a delay until after a budget period
* There is no formal evaluation process
 | * Contact is not an evangelist
* There is no decision maker
* A competitor is creating obstacles
 | * Conduct discovery interviews
* Ensure every interaction is an exchange of value
* Confirm decision maker
 |
| **Deal has Stalled** | * Customer requests a delay for unspecified reason
 | * Insufficient trust
* A competitor is creating obstacles
 | * Conduct discovery interviews with all stakeholders about: project deadline, dependencies, competitors
 |
| **Status Quo** | * Lost the deal
* Customer will not move forward with any solution
 | * No pain point
* Migration costs too high
 | * Debrief with the customer
* Check migration costs
 |
| **Unresponsive** | * Customer won’t return phone calls or emails
 | * Contact is on vacation
* Customer has other priorities
* No pain point
 | * Follow up three times
 |