Sales Guide Template

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| PREP EMAIL TEMPLATE Send 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>> |

## 

| INTRODUCTIONS Practice 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 ROLES Define 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 |

## 

| SHORTHAND Use 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 QUESTIONS Review 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 OBJECTIONS Review 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 STEPS Prepare 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 POINTS Listen 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 PITCH Have 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 BUY Use 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 CHECKLIST Ensure 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 TEMPLATE Send 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 Items  Notes   * Objectives * Metrics for Success * Obstacles * Remaining Questions   Did I miss anything?  Cheers,  <<your name>> |

| TRIAGE Identify 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 |