FREE SALES GUIDE | SALES

How you win work, and how to win more of it

Build a better sales process from the parts that already work. A half-day guide for owners, and for anyone in the business who sells.

You already have a sales process. This guide writes it down, keeps what works and fixes what does not.

1 What sales must deliver
2 Kinds of selling
3 How you win work now
4 Who, and where from
5 Stages the client moves
6 Qualify first
7 The conversation
8 The monthly review
9 A few numbers
10 Bringing the team with you
11 The next layer
12 This month I will

For owners, and people with the authority to change how the business runs, in service businesses of £500K to £10M turnover. Use it on your own, or with everyone who sells.

SMARTer Entrepreneurs

smarterentrepreneurs.co.uk

BEFORE YOU START

How this guide works

Almost every business that turns over half a million pounds has a sales process. It is simply not written down anywhere, which is why it works well on some Tuesdays and not at all on others.

Ask three people in the business how a new client is won and you will get three answers, all of them partly right. This guide helps you look at how you actually win work, keep what works, fix the step that lets you down most, and add the rest when you are ready. You finish with your process on one page and one change to make this month.

> **I sell it myself:** work through in order and skip chapter 10. **We have people selling:** do chapter 3 with each of them, and read chapter 10 before you change anything.

	Chapter	What you end up with	Time
1	What you want sales to deliver	The wins you need, and the activity behind them	15 min
2	What kinds of selling do you do?	Which sales need their own process	10 min
3	How you win work now	Your last ten, and what to keep, fix or add	40 min
4	Who you sell to, and where from	The client you want more of, and where from	15 min
5	Stages the client moves, not you	Five stages, each ended by the client	20 min
6	Qualify before it counts	The questions a deal must pass	15 min
7	The sales conversation	A plan for your next important meeting	20 min
8	Keep it moving	A monthly review in the diary	10 min
9	A few numbers that matter	Two or three numbers to watch	15 min
10	Bringing the team with you	What each seller needs for it to stick	20 min
11	The next layer	Where to go next, and when	5 min
12	This month I will	One change, written down	5 min

What you need

Last year's inbox and diary, any list of proposals or quotes, and a quiet couple of hours. The boxes fill in on screen.

SHORT ON TIME? THE 30-MINUTE VERSION

1. List your last ten opportunities and how each one ended.
2. Mark the step where most of the losses stopped.
3. Write what the client must do before a deal moves past that step.
4. Book an hour next month to look at every live deal.
5. Write the one thing you will do differently this month.

BEFORE YOU START

Which of these sounds familiar?

Most sales problems in a service business turn out to be one of a handful of common ones. Tick the ones that sound like you. They tell you which chapters to spend longest on.

The problem	Chapters	Tick
The founder is the main seller, and selling competes with delivering the work	2, 10	☐
Feast and famine: selling stops when everyone is busy, then the pipeline is empty	1, 8	☐
Proposals go quiet, or the client decides to do nothing	5, 6, 7	☐
Most work comes from referrals and existing clients, but nobody manages either	4	☐
People who do the work will not or cannot sell, or miss the follow-on work	2, 10	☐
Pricing on time rather than value, and discounting to win	11	☐
Promises made in the sale do not reach the people delivering	11	☐
The client cannot see the service before buying, so trust carries the sale	4, 7	☐

The business you will meet along the way

C

A business applications consultancy

About 18 people, implementing finance and CRM software for mid-sized companies

Most enquiries come through the software vendor's partner channel. Three people sell: the founder, his co-director and a business development manager, each in their own way. After a first call the prospect usually asks for a proposal, and a director writes it, often over a weekend. About half of last year's proposals had no reply. The directors put it down to price, or to a bigger partner.

The consultancy is an illustration, not a real client. You will see what it found, and what it changed, in each chapter.

CHAPTER 1 OF 12

Start with what you want sales to deliver

Most sales plans start with the target and stop there. A target tells you where you want to be. It says nothing about what anyone should do on Monday.

Work back from the result in three steps.

1. **The result.** What sales must deliver, and by when: new clients, fees from new work, or more work from the clients you have.
2. **The wins that would get you there.** How many new clients or pieces of work, and of what kind.
3. **The activity behind the wins.** How many first conversations, meetings or proposals it usually takes to win one, from your own history. If you do not know yet, make a sensible guess. Chapter 9 will correct it.

> **Results you can only watch. Activities you can manage.** A plan that names only the result leaves everyone hoping. A plan that also names the activity tells people what to do next week.

The consultancy wants more clients of the kind it enjoys most: mid-sized companies replacing an old finance system. Working back, that means more first conversations with those companies each month, and fewer proposals sent to anyone who asks for one.

YOUR TURN

The result, and by when

The wins that would get us there

The activity behind them, each month

CHAPTER 2 OF 12

What kinds of selling do you do?

A business that wins new clients through proposals and also grows a few large accounts is doing two different jobs. One process for both usually suits neither, and then nobody uses it.

Kind of selling	What it looks like	Its process is mostly about
New clients	An enquiry or introduction from someone who has not bought before	Qualifying, the conversation, the proposal
Growing existing clients	More work, or different work, from clients you already have	Staying close, and spotting the next need
Quick, repeat sales	Routine work bought often: a quote, a renewal, a booking	Speed, accurate quotes, following up, rebooking
Bids and large projects	A formal tender, or a project several people must agree to	Deciding whether to bid, who decides, the timetable

Give each kind you do its own light process. Large sales and quick ones work differently: Neil Rackham's research found that some things which help a quick sale get in the way of a large one, so the conversation in chapter 7 matters most for new clients, large projects and growing accounts.

The consultancy does two kinds: new clients, mostly through the software vendor, and growing existing clients after the software goes live. It had one way of selling for both, run three different ways by three different people.

YOUR TURN

Kind of selling	We do this	Who sells it	Roughly how much of our work
New clients			
Growing existing clients			
Quick, repeat sales			
Bids and large projects			

Which route are you? If one person sells everything, you are on **I sell it myself**. If two or more people sell, including people who also do the work, you are on **We have people selling**.

CHAPTER 3 OF 12

How you win work now

You have more evidence about how you win work than you think. It is sitting in your inbox, filed under the names of people who said yes, and a slightly longer list of people who stopped replying.

List your last ten opportunities that reached a conversation about fees, won and lost, including the ones that simply stopped replying. Rough answers from memory and your inbox are fine.

YOUR LAST TEN

	Client and work	How it started	Who sold it	Won, lost, no decision, open	Where it stopped, or what tipped it
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					

Where did most of the wins come from?

Where did most of the losses stop: early, in the middle, or after the proposal?

Ten is a small number. It shows you patterns, not proof, which is all you need to choose what to fix first. If you want more detail, the worksheet How you win work now goes further.

Trace the steps, then keep, fix or add

Take two or three recent wins and write down what actually happened, step by step, from first contact to yes. Not what should have happened. The steps they have in common are your process today. Then mark each one:

Keep	It works. Do not touch it.
Fix	It is where deals stall or go quiet.
Add	Something is missing. Note it for later.

Then choose one fix. One. The others will still be there next month.

> **We have people selling?** Do this separately with your strongest seller and with an average one. The difference between how they work is usually the most valuable thing you will find in this guide. The aim is to spread what works, not to make your best seller work like everyone else.

The consultancy's last ten showed that most wins came from existing clients and the vendor's referrals, and most losses went quiet after a proposal. Keep: the vendor relationship. Fix: proposals written before the client had said what the problem was costing them. Add: a monthly look at every live deal.

YOUR TURN

	Step, as it happens today	Keep, fix or add
1		
2		
3		
4		
5		
6		
7		

The one step I will fix first

CHAPTER 4 OF 12

Who you sell to and where work comes from

Not every client is a good client, and the best source of more good clients is usually the ones you already have.

Start from your best clients

Look back at the wins in chapter 3 and pick the two or three you would happily repeat: good work, fair fees, people you enjoyed working with. What do they have in common? Their size, their sector, the problem they brought, the person who called you. That is the client you want more of, and it is the description everyone who sells should carry around.

Where good work comes from

David Maister, who spent years studying businesses that sell expertise, ranked where new work is most likely to come from. In order:

1. Existing clients with a need they already know about.
2. Existing clients with a need they have not spotted yet.
3. New clients who already know they have a need.
4. New clients who do not yet know they have one.

Most selling effort goes on the last of these, which is the hardest of the four. Maister also found that clients first check that a business can do the work, then choose the people they want to work with. Showing what you know (a useful conversation, a short talk, an article in their trade press) does more than telling them.

For the consultancy, most good work came from two places: the vendor's partner team, and clients after their software went live. It now meets the vendor's partner manager every quarter, and calls each client a few months after go-live to ask how it is going.

YOUR TURN

The client we want more of

The one or two places most of our wins come from

One regular thing we will do for each

CHAPTER 5 OF 12

Stages the client moves, not you

Most pipelines are organised around what the seller has done: met them, sent the proposal, chased twice. The trouble is that sending a proposal is something you did. It tells you nothing about whether they will buy.

Rackham calls a step the client agrees to an **advance**. A meeting that ends with "let's keep in touch" feels friendly and moves nothing; he calls that a continuation. So define each stage by something the client has done.

	Stage	It ends when the client has...
1	**Conversation**	agreed to a first meeting
2	**Qualified**	said what the problem is, why it matters now, and who decides
3	**Proposal**	agreed what the proposal should cover, before you write it
4	**Decision**	given a date for the decision and said who signs
5	**Won**	signed, or confirmed in writing

For quick, repeat sales the stages are shorter: enquiry, quote, followed up, booked, delivered, rebooked. The last one matters most, because a client who books again is far cheaper to win than a new one.

The consultancy added the Qualified stage. No proposal is written now until the client has said what the problem is costing them.

YOUR TURN: YOUR STAGES

	Stage	It ends when the client has...
1		
2		
3		
4		
5		

One set of stages for each kind of selling you do. Copy them onto the process map on page 17.

CHAPTER 6 OF 12

Qualify before it counts

A smaller pipeline you believe in is worth more than a large one you hope about.

Jason Jordan and Michelle Vazzana, who studied how sales teams are managed, put it simply: decide whether an opportunity is real before it goes on the list, because the list decides where everyone's time goes. Five questions are enough for most service businesses:

1. Is there a real problem, in their words?
2. Does it matter enough to act on, and why now?
3. Who decides, and have we spoken to them?
4. Is there money for it, or a way to find it?
5. Is it work we are good at, and want more of?

> **You are allowed to say no.** A deal that fails two of these is not a deal yet. Keep in touch, be useful, and let it come back when something changes. The time you save goes to the deals that pass.

If you want a fuller version, the free guide The Qualification Scorecard scores each opportunity on the same ground.

The consultancy's proposals that went quiet mostly failed the first two questions. The prospect had a problem but had never said what it was costing them, so there was nothing to weigh the price against.

YOUR TURN

Write your own questions, in your own words. Start from the five above.

1

2

3

4

5

What we do with a deal that fails

CHAPTER 7 OF 12

The sales conversation

Rackham's team studied more than 35,000 sales calls. In larger sales, the people who won asked more about the client's problem and what it led to, and spent less time describing what they offered. In plain words, that comes down to four questions:

1. What happens now?
2. What is not working?
3. What does that lead to, or cost?
4. If it were fixed, what would that give you?

Let them answer in their own words, and note what they say. Hold back your answer until they have told you what fixing it would be worth. Then end the meeting with a step they agree to: introducing the person who decides, sharing last year's figures, booking the next meeting. "Send us something" is not a step.

Which meetings deserve a plan?

Not all of them. Plan when one meeting could make or break the sale, when you do not know what to expect, or when several people will be in the room.

> **Pressure loses large sales.** In Rackham's studies of larger sales, the sellers who used the most closing techniques won fewer orders, and most professional buyers said a close they spotted made them less likely to buy.

The consultancy held back its next proposal and had a second short call using the four questions. The proposal it then wrote used the prospect's own words about what the problem cost.

YOUR TURN: YOUR NEXT IMPORTANT MEETING

Who I am meeting, and when

The step I will ask them to agree to

What I want to find out: the problem, what it costs, what fixing it is worth

CHAPTER 8 OF 12

Keep it moving

A sales process that nobody looks at slowly turns back into whatever people were doing before. The monthly review is what keeps it alive.

Once a month, for about thirty minutes, take every live deal in turn and ask three questions:

1. What has the client actually done since we last looked?
2. What next step have they agreed to, and when?
3. Is anything missing that we should be doing?

Where a deal has no agreed next step, call once to agree one. If nothing comes of it by the next review, take it off the list and keep in touch. It comes back when the client does something.

> **We have people selling?** Hold one review with each seller, not one big meeting. Keep it about moving deals forward. Forecasting what will close is a separate question for a separate day, and mixing the two turns a useful conversation into a defensive one.

The consultancy now holds a short review with each of its three sellers in the first week of the month. In the first one, several proposals turned out to have had no conversation since they were emailed.

YOUR TURN

Date of the first review (put it in the diary now)

Who is in it

Where the list of live deals lives

CHAPTER 9 OF 12

A few numbers that matter

You cannot manage sales results directly. You can only manage what people do, and watch what happens.

Jordan and Vazzana split sales measures into three kinds. Only the first can be managed directly.

Kind	What it means	For example
Activities	What people do. You manage these.	First conversations held, meetings with the person who decides, past clients called
Objectives	What the activities should lead to. You influence these.	Share of conversations that become qualified deals, share of proposals won
Results	What you are after. You watch these.	New clients won, fees from new work

Pick two activities and one result. Compare them with your own history, not with someone else's benchmark. There is no reliable figure for a good win rate in your kind of business; your own last year is the best guide you have. Then go back to chapter 1 and check your guess about the activity behind each win.

The consultancy watches two activities (first conversations through the vendor, and calls to clients after go-live) and one result (new clients of the kind it wants more of).

YOUR TURN

	What we will count	Where we are now	Where we want to be
Activity 1			
Activity 2			
Result			

Bringing the team with you

A new process handed down by the owner tends to last until the first busy fortnight. One the sellers helped build lasts longer: a well-known 1948 study found that factory workers who helped plan a change accepted it faster than those who were simply told.

Each person who sells needs five things before a new way of working sticks, in this order:

	Each seller needs	What it looks like	What you do
1	**To see why**	They know where deals stall, and what it costs them	Share chapter 3's findings
2	**To want to take part**	They helped build it	Agree the stages and questions together
3	**To know how**	One page, one stage at a time	Show it on their own live deals
4	**To be able to do it**	It works on a real deal	Use it yourself first, and coach on real deals
5	**To keep doing it**	It is part of the month	The monthly review; notice when it works

You go first. In studies of salespeople taking up new sales systems, managers' use shaped their teams' use far more than the reverse, and new tools helped only with proper training and support.

> **Expect a dip.** When a pharmaceutical sales force switched to a new system, results fell for a few months while people learned, then recovered and ended a little higher than they started. A dip in the first month is normal. Start small (one kind of selling, one stage, one or two sellers) and review it together after 90 days.

The co-director, who had written proposals his own way for years, was the slowest to change. So the founder ran his own deals through the new stages first.

YOUR TURN

Seller	Which of the five is missing?	What I will do

The five needs follow Jeffrey Hiatt's ADKAR model (awareness, desire, knowledge, ability, reinforcement), widely used in managing change.

When you are ready: the next layer

Everything so far is the core. The rest is worth adding, one piece at a time, once the core is running.

Add the next piece only when the core (chapters 1 to 9) has been running for a couple of months. Each of these is a problem a service business commonly meets, and each has a free one-page options sheet on the website.

When this is the problem	Add	Free options sheet
Proposals take hours and go nowhere	Proposals written from the client's own words, with options	We spend hours on proposals and get nowhere
Good prospects go quiet	Following up without chasing	Good prospects go quiet, then buy from someone else
You lose and never find out why	Asking why, every time	We lose and never find out why
Only you can sell	More than one person able to sell	I'm the only one who can sell
Clients buy once and drift away	Staying close after the work, and rebooking	Clients leave and we don't see it coming
You discount to win	Holding your price	Bring it to a free call
Promises in the sale do not reach delivery	A proper handover from sale to delivery	Bring it to a free call

Three free guides that go further

The Qualification Scorecard	A fuller version of chapter 6, scoring each opportunity before you spend time on it.
Why Expertise Is Hard to Sell	Why selling something the client cannot see is different, and what helps.
The 90-Day Revenue Foundations Plan	A twelve-week plan for putting the basics in place.

All of them are free at smarterentrepreneurs.co.uk.

CHAPTER 12 OF 12

This month I will

You have done the thinking. This page turns it into something that happens.

One change, to one stage, this month. Not a new CRM system and not a sales away day. One change, written down, with a date, and somebody else who knows about it.

YOUR TURN

The stage I am changing

What I will do differently

By when

Who else needs to know

How I will know it has worked

Then put it on one page. The next page is your sales process on a page, ready to fill in from chapters 3, 5, 6 and 9. The page after it shows the consultancy's, filled in. Keep yours somewhere everyone who sells can see it, and bring it to the monthly review.

The best sales processes in businesses like yours are rarely clever. They are written down, they are looked at once a month, and they are dull in exactly the way a reliable boiler is dull. Nobody thinks about it, and the house stays warm.

THE PAGE TO KEEP

Your sales process on a page

Kind of selling (one page for each kind)

Last reviewed

Stage					
The client action that ends it from chapter 5					
What we do the activities					
Questions or tools we use from chapters 6 and 7					
The number we watch from chapter 9					
Who owns it one name					
Keep, fix or add from chapter 3					

AN EXAMPLE

The consultancy's sales process on a page

Kind of selling: new clients through the software vendor. The consultancy has a second page, shorter, for growing existing clients after go-live.

Stage	Conversation	Qualified	Proposal	Decision	Won
The client action that ends it	Agrees to a first call, usually through the vendor	Has said what the problem costs, why now, and who decides	Agrees what the proposal will cover	Gives a decision date and names who signs	Signs
What we do	Call within a day of the vendor's introduction	Second short call before any proposal	Write it from the client's words; walk them through it	Agree the timetable with whoever signs	Hand over to the delivery lead
Questions or tools we use	Is this the kind of client we want more of?	The four questions; the five qualifying questions	Their words on cost and value	Who else needs to agree?	Handover notes
The number we watch	First conversations each month	Calls that reach Qualified	Proposals talked through after sending	Time from proposal to decision	New clients won
Who owns it	Business development manager	The director who will lead the work	The same director	The same director	Founder
Keep, fix or add	Keep	Add (new stage)	Fix	Keep	Add later

> **What changed.** Before, a proposal followed every first call that asked for one. Now a proposal is written only after the client has said what the problem costs (the new Qualified stage), and someone talks each proposal through with the client rather than emailing it and waiting.

An illustration, not a real client. Yours will look different, and it should.

WE HAVE PEOPLE SELLING

Running this with everyone who sells

The people who sell already know more about how you win work than any process. The session simply gets it out of their heads and onto one page.

A sales process built by the owner and announced to the team is a document. One built with the people who sell is a habit. Here is a two-hour session for building it together, after each person has done chapter 3 on their own.

Time	What happens	Chapter
Before	Each seller fills in chapter 3 on their own: their last ten, and the steps of two recent wins	Chapter 3
0:00	Each person shares their last ten. Look for where wins came from and where losses stopped	3
0:30	Compare how the strongest and the average seller work. Agree what to keep	3
1:00	Agree the stages and the client action that ends each one	5
1:30	Agree the qualifying questions, and what happens to a deal that fails	6
1:50	Book the monthly reviews, one for each seller	8
2:00	Each person writes one change for this month	12

Go first yourself.
Run one of your own deals through the new stages before you ask anyone else to.

Listen for the reason.
When someone resists, ask which of the five needs in chapter 10 is missing for them.

Review at 90 days.
Put the date in now. Keep what works, change what does not, together.

A NOTE FROM SIMON

The process nobody followed

Some years ago I was asked to improve sales in a part of a very large software business that mattered a great deal to it. The business had a magnificent sales process, involving many salespeople, partners and a huge supporting cast.

The team and I went through the process step by step, expecting to find what was broken. It looked near perfect. The problem was somewhere else entirely: almost nobody followed it.

So we did not redesign it. We reinforced it and helped people follow it, and at the same time we changed the conversation with clients from a technical one to a business one. Sales grew by more than 15% on the year before.

The process did not need to be better. It needed to be used. That is why this guide starts with the process you already have, and spends as long on getting people to use it as on getting it right.

Simon Hale
Founder, SMARTer Entrepreneurs

Where to go next

The ten key areas review. About fifteen minutes. A quick, honest look at all ten key areas of your business, including Sales and Clients, ending with the two or three that would make the biggest difference: smarterentrepreneurs.co.uk/ten-key-areas-review.

A Plan for Every Goal. If chapter 1 showed you need a clearer goal for the business, start there: smarterentrepreneurs.co.uk/plan-for-every-goal.

Free options sheets. One page each on the problems that get in the way, from "We spend hours on proposals and get nowhere" to "I'm the only one who can sell", at smarterentrepreneurs.co.uk.

AT THE BACK

Where these ideas come from

Everything in this guide rests on published research or well-tested practice. You do not need any of it to use the guide, but if you would like to read further, these are the places to start.

Working back from the result	Jason Jordan and Michelle Vazzana, Cracking the Sales Management Code, 2012
Activities, objectives and results	Jordan and Vazzana, 2012
One process for each kind of selling	Jordan and Vazzana, 2012
Qualifying before a deal counts	Jordan and Vazzana, 2012
Large and small sales differ	Neil Rackham, SPIN Selling, 1988
Advances and continuations	Rackham, 1988
The four questions	Rackham, 1988 (the SPIN questions, in plain words)
Closing in large sales	Rackham, 1988
Where deals stall	Keith Eades and Timothy Sullivan, The Collaborative Sale, 2014
Where good work comes from	David Maister, Managing the Professional Service Firm, 1993
Involving people in a change	Lester Coch and John French, "Overcoming Resistance to Change", Human Relations, 1948
The five needs	Jeffrey Hiatt, ADKAR: A Model for Change in Business, Government and Our Community, Prosci, 2006
Sellers follow their manager	Christian Homburg, Jan Wieseke and Christina Kuehnl, Journal of the Academy of Marketing Science, 2010
Training and support	Michael Ahearne, Rebecca Jelinek and Adam Rapp, Industrial Marketing Management, 2005
Expect a dip	Michael Ahearne, Son Lam, John Mathieu and Willy Bolander, Journal of Marketing, 2010

The research on bringing a team with you was done in large companies adopting new sales systems, not small businesses adopting a process, so it is applied here by analogy.

WANT A SECOND PAIR OF EYES?

Bring your process on a page to a free call

Forty-five minutes on Zoom, with your process on a page or the sales problem that keeps coming back. We spend the time on your business, not on what I sell. If working together would help, I will say so once, at the end, and you are free to say no.

SMARTer Entrepreneurs helps owners of service businesses, £500K to £10M turnover, build a business that achieves what they want it to.

smarterentrepreneurs.co.uk

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