

Sales process templates

Generic outbound sales process

#1

Sales process stage	Team	Activities	Key metrics/KPIs	Tools
Lead research	SDR	List building, contact look-up and enrichment	E.g. # of leads generated	Sales trigger software, social listening tools, email finders, email verification tools
Prospecting	SDR	Outreach (LinkedIn, email, calls), further research and qualification	E.g. response rate, demos booked, # of phone calls	Sales engagement platform (SEP)
Pitch	Sales	Product/offer presentation	E.g. offers sent, lead to opportunity ratio	Video conferencing
Negotiations	Sales	Communication, handling objections	E.g. loss/churn rate	Email, video conferencing
Closing	Sales	Purchase	E.g. win rate, sales cycle length, sales cost	Documents management and e-signature software
Nurturing	Customer support/account managers	Onboarding and regular check-ins	E.g. customer lifetime value, NPS, retention	Customer support software, email, video conferencing

Generic inbound sales process

#2

Sales process stage	Team	Activities	Key metrics/KPIs	Tools
Qualification	SDR	Prospect research and assessment	E.g. MQL to SQL conversion rate, time response rate, demos booked	Sales intelligence software, contact enrichment tools
Engagement	Sales, SDR	Nurturing, presentation	E.g. lead to opportunity ratio	SEP, video conferencing
Negotiations	Sales	Communication	E.g. loss/churn rate	Email, video conferencing
Closing	Sales	Purchase	E.g. win rate, sales cycle length, sales cost	Documents management and e-signature software
Nurturing	Customer support/success	Regular check-ins	E.g. customer lifetime value, NPS, retention	Customer support software, email, video conferencing

SaaS sales process (consultative, outbound)

#3

Sales process stage	Team	Activities	Key metrics/KPIs	Tools
Lead research	SDR	Research	E.g. # of leads generated	B2B databases, email finders, lead generation software
Prospecting	SDR	Outreach (LinkedIn, email, calls), research and qualification	E.g. response rate, demos booked	SEP
Demo	Sales	Product presentation	E.g. demos made, lead to opportunity ratio	Video conferencing
Negotiations	Sales	Communication	E.g. loss/churn rate	Email, video conferencing
Conversion	Sales	Freemium/trial sign-up	E.g. opportunity to closed won rate	Documents management and e-signature software
Nurturing	Customer support/success managers	Onboarding, training and engagement	E.g. NPS, retention/churn	Customer support software, email, video conferencing
Closing	Sales/account managers	Purchase	E.g. trial to customer conversion	Email, video conferencing

SaaS sales process (simple, inbound)

#4

Sales process stage	Team	Activities	Key metrics/KPIs	Tools
Conversion	Marketing	Freemium/trial sign-up, marketing to sales hand-off	E.g. conversion rate	Inbound marketing tools
Nurturing	Account/customer success managers	Onboarding and engagement	E.g. NPS, retention/churn	Customer support software, email, video conferencing
Closing	Account/customer success managers	Conversion to paid subscription	E.g. trial to customer conversio	Email, video conferencing