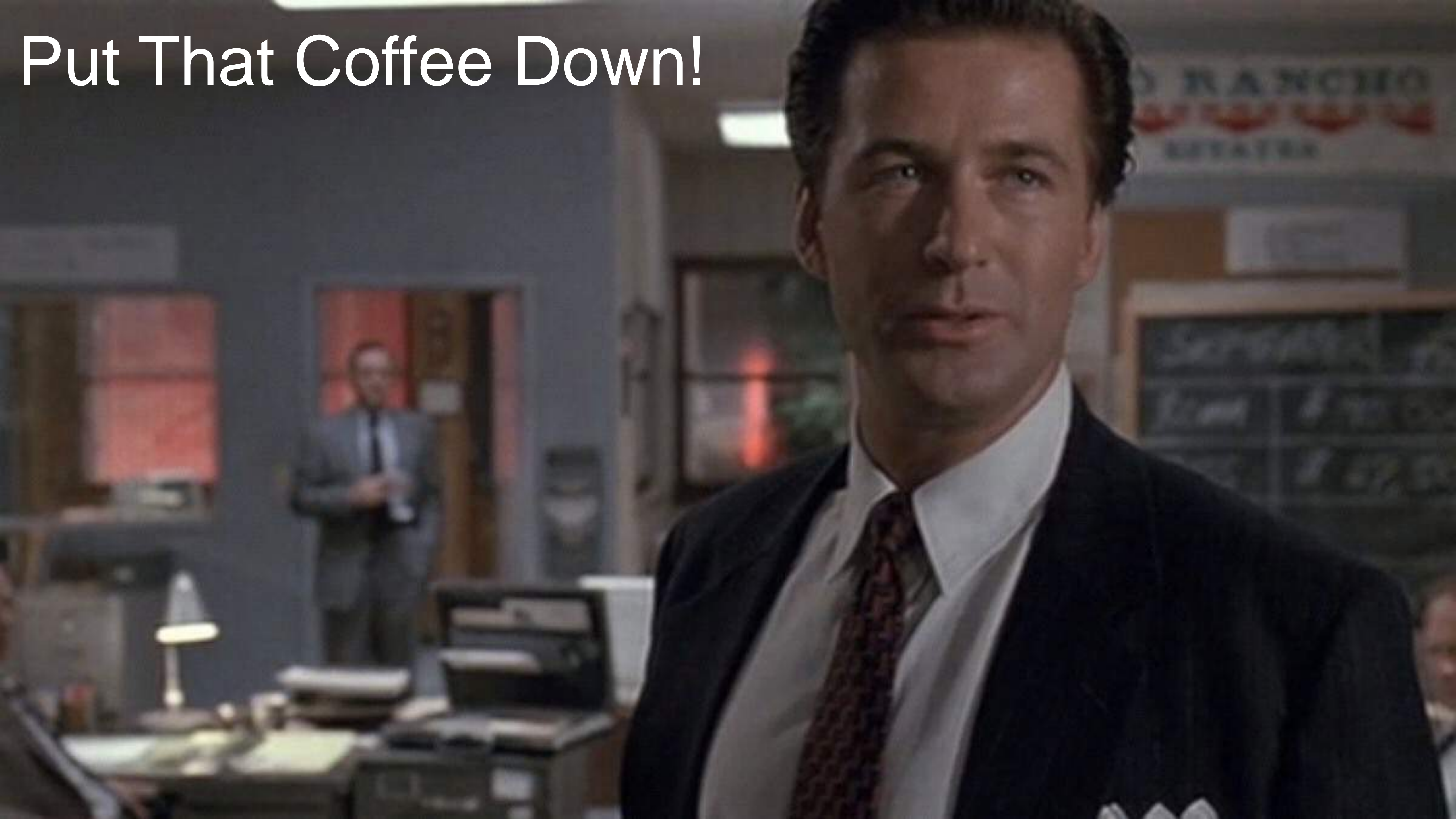


Put That Coffee Down!





# Coffee's for Closers (but only if you have an established sales process)

September 26, 2015

ADAM LAMAGNA, Solutions Consultant

***oomph***

# Introductions

SOLUTIONS CONSULTANT

## Adam Lamagna

Adam's primary focus is to help clients find the right solution to their web challenge. Cultivating new relationships, he works with companies and organizations to help find the balance between design, technology and business.



2014 - Present

*oomph*



2012 -2014

CODE & TECHNOLOGY



2007 - 2012

CONSTRUCTION



2000 -2006

SALES



1999

ROCKSTAR

# The World's 2nd Oldest Profession!!

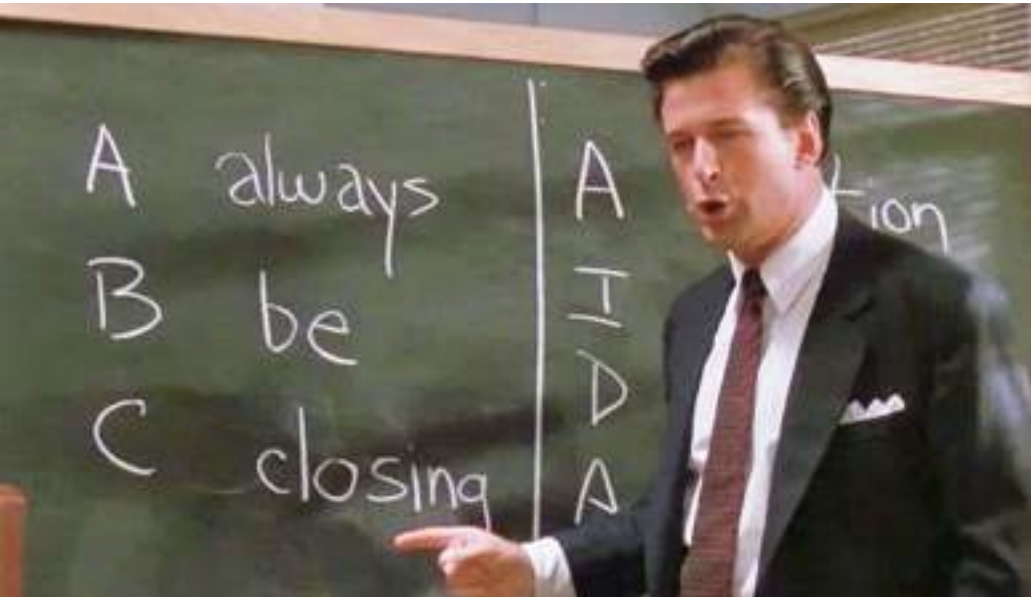
## History of Sales



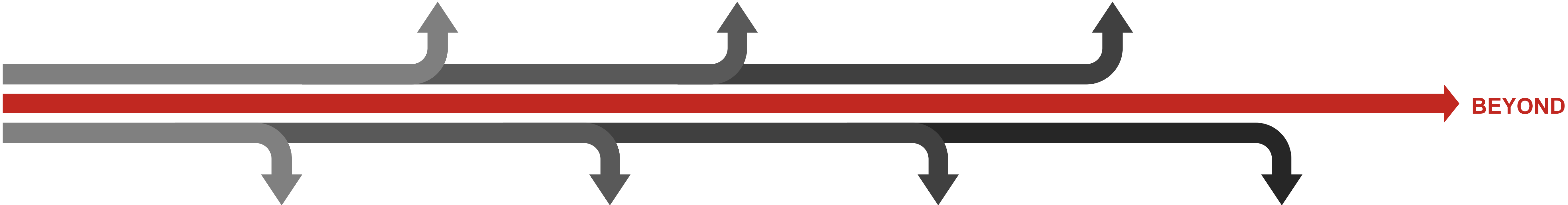
**BEFORE C.E.**  
Metal objects were introduced,  
money was born



**1940's - 1950's**  
The fast-talking salesman and  
Kirby vacuums



**1980's - 1990's**  
Solution or strategic selling -  
ABC, always be closing



**BEGINNING OF TIME**  
The bartering system



**1700's - 1800's**  
Industrial Revolution ushered  
in the era of exaggerated  
selling tactics



**1970's - 1980's**  
Consultative selling, SPIN  
selling - getting the consumer  
more involved in the process



**2000's**  
With the information age, power  
shifts from the salesman to the  
customer



## SALES PROCESS:

# What is a sales process?

A *sales process* is your view of the customer's buying journey, with the steps, tasks, procedures, and resources that allow your sales team to manage the buyer's journey effectively.



SALES PROCESS:

Why do I  
need one?



## Improvement

Always keep close watch on where bottlenecks are happening. See if certain stages of your process are taking too long. Then improve it.

## Focus

Having a process in place allows a sales team to truly focus on the customer and/or prospect. Instead of being worried about what's next, you already know.

## Measure

Creating a baseline will help you develop your process over time. It gives you a measurable process you can analyze and adjust.

## Integrate

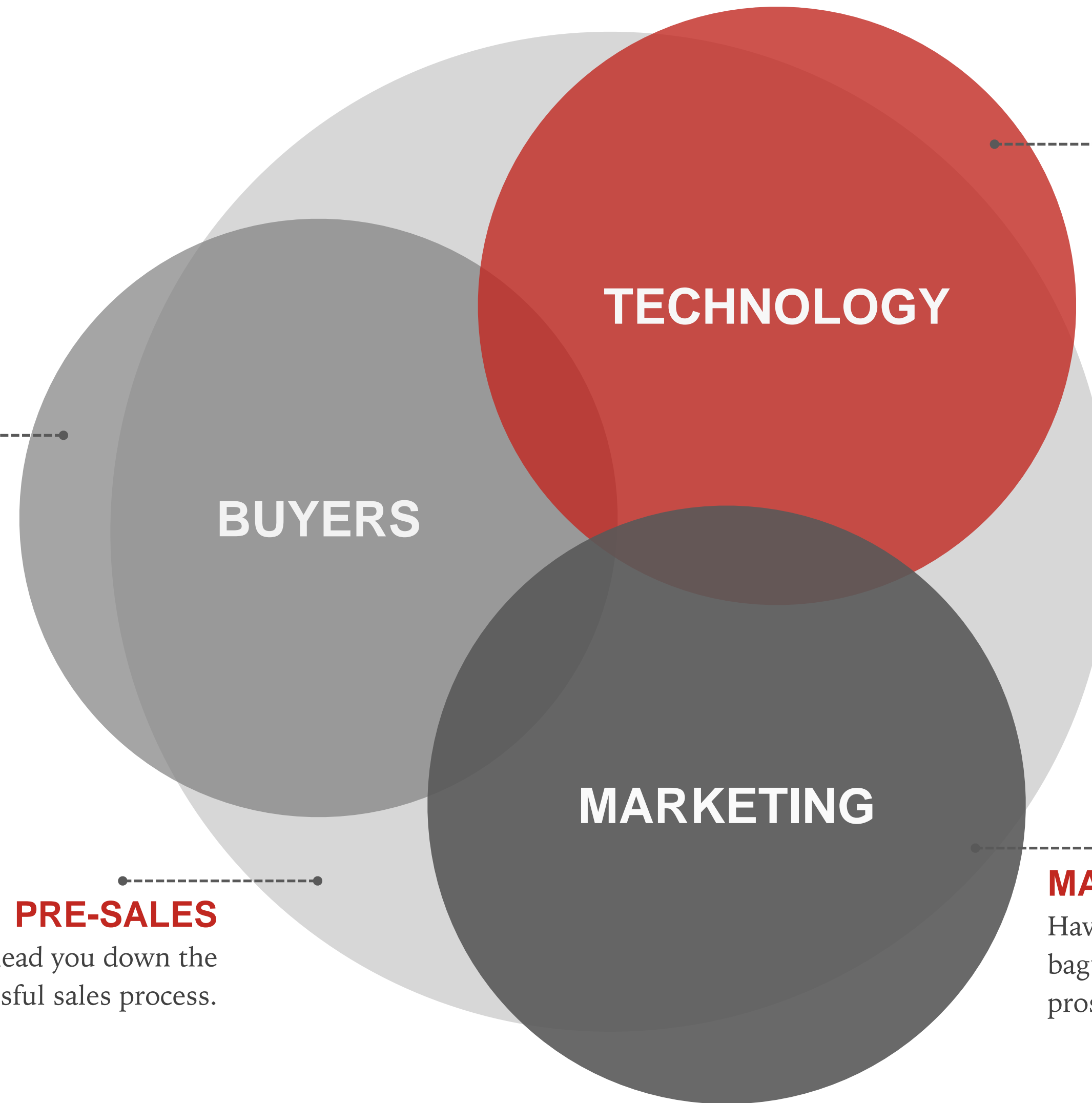
A process gives your CSRs or salespeople something to follow. They have a process that provides consistency and they can learn from it.

## SALES PROCESS: Getting Started

The pre-sales process consists of planning and preparing so you can effectively engage the right prospects at the right time with the right tools.

**BUYERS**  
Figuring out who you are selling to helps you understand your clients and prospects better.

**PRE-SALES**  
All these activities will lead you down the right path to a successful sales process.



**TECHNOLOGY**  
Use CRMs, social media, and business websites to get and retain information on your buyers.

**MARKETING**  
Having the right tools in your “sales bag” allows you to effectively engage prospects.

PRE-SALES:  
Buyers

# WHO ARE YOUR BUYERS?

1. What roles do they have?
2. What organizations / industries do they work for?
3. What do they care about?
4. What will they need to make a decision?





## Marketing Buyer

PRE-SALES:

## Buyer Personas

### Cares About

- Lead Generation
- Increased Awareness
- Results

### How do we help them?

- Be responsive / Sense of urgency
- Make data-driven recommendations
- Be a liaison with vendors

### Demographics

- Age: 30-40
- Gender: 50%M 50%F
- Married w/ kids
- VP or Director Level

### Pain Points

- Hitting deadlines
- Managing Vendors
- Lack of internal resources

PRE-SALES:  
Marketing

Marketing materials should answer your buyers' questions and showcase your value.



Case studies show prospects your capabilities.



Blog posts answer your prospects' questions.



White papers go into more depth about a subject.



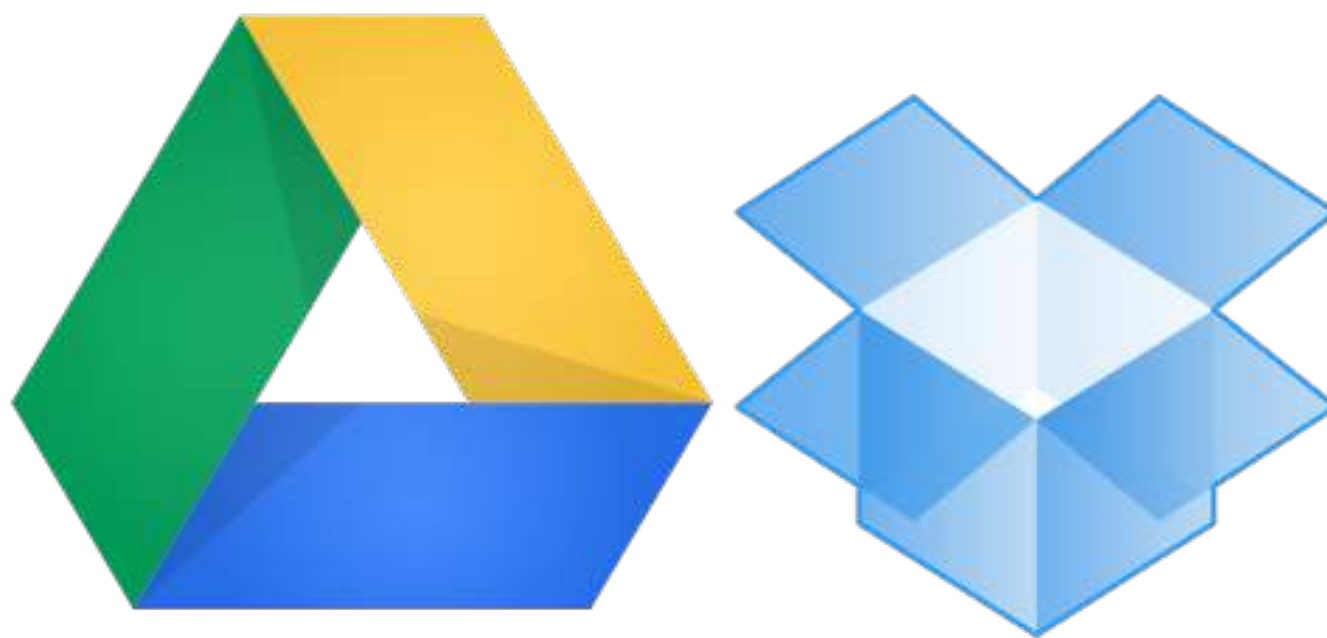
Email newsletters can generate great quality leads.



## PRE-SALES: Technology

Use technology to find and organize more business and better business

Use Google Drive or Dropbox to keep track of documents you receive.



Use a CRM (HubSpot has a great, free one. You need to organize your prospects and keep track of what stage of the sales process they're in.

Use social media to see what your prospects are up to and posting about.



- HubSpot
- Zoho
- Salesbox
- Insightly
- FreeCRM

Follow business blogs - AMEX Open Forum is a great place to keep up to date with



**ENGAGEMENT:**

# The Sales Funnel

A representation of the different stages the buyer will go through.



**ENGAGEMENT:**

# The essentials of each stage

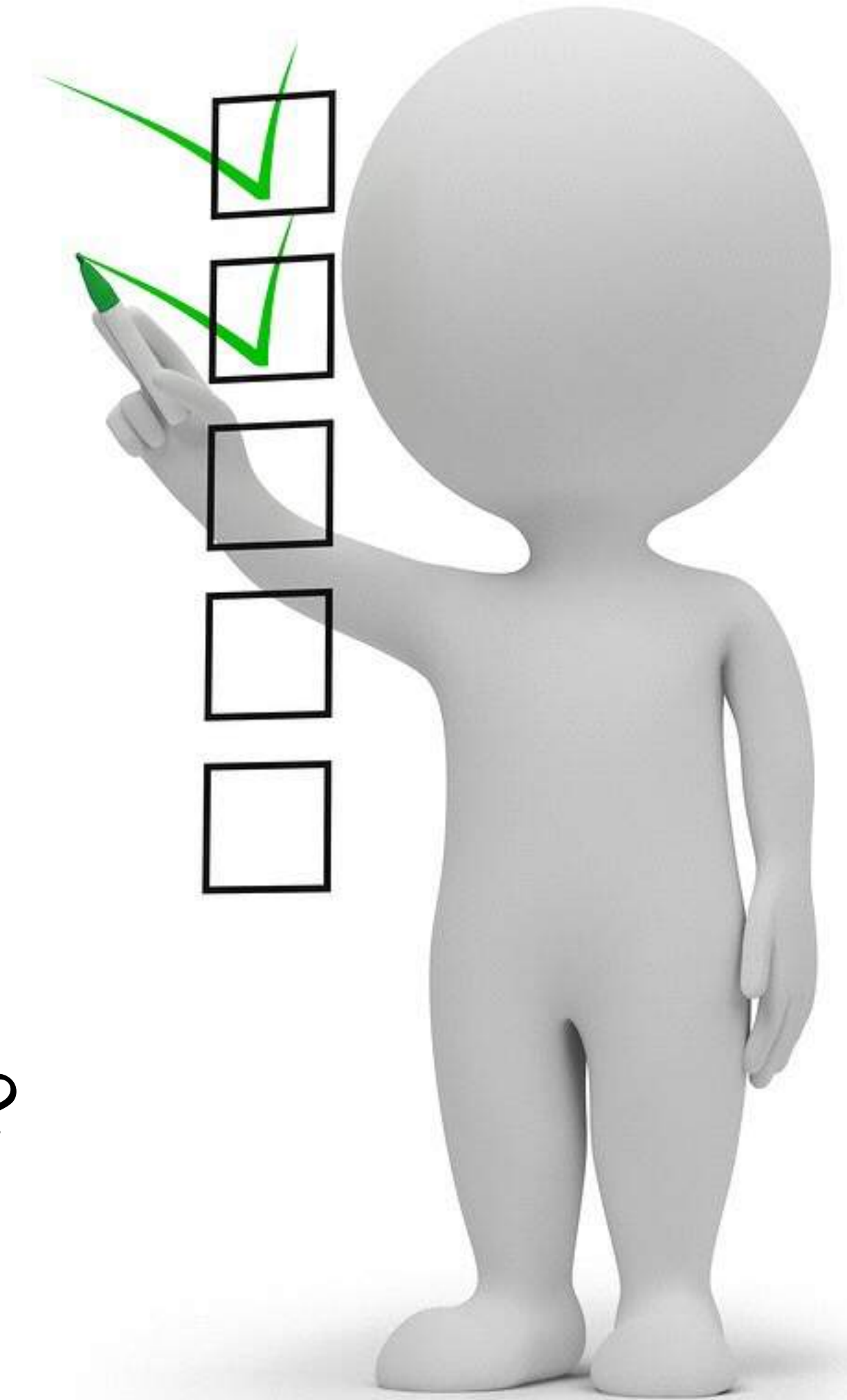
Effectively engaging your prospect at each stage of the sales process.

STAGES:	REQUIREMENT	PURPOSE	TEAM MEMBER	RESOURCES
Prospecting	Prospect has a need you think you can solve	Schedule a call or schedule a meeting	Sales or Marketing	Website, Portfolio, Emails, Marketing Collateral, etc.
Qualify	Meeting/Call has been set to qualify opportunity	Prospect is a good fit, ready to buy, has a budget	Sales Member	Screening Questionnaire, Lead Scoring, Case Studies
Scoping	Passing screener questions, budget is confirmed, you have a decent gut feel	Fully understand the prospect's challenge, begin writing proposal	Sales Member, Subject Matter Expert, Strategist	Previous SOWs, Capabilities, Experience
Proposal / Presentation	Stakeholders are engaged, will get opportunity to present	Make an offer to your prospect to earn their business	Sales Member, Strategist, other team members	Custom Proposal & Custom Presentation
Closing / Contracts	Presentation went well and you got a verbal yes	Negotiation, paperwork signed, get a new client	Sales Member, Office Manager, Contracts Manager	Contract outlining the scope of work in detail

## Screeener Questionnaire

1. Where are you located?
2. How did you hear about us?
3. What are your major goals for the project?
4. What is your target completion date and budget range?
5. Many, many, many more questions!!

<http://muledesign.com/designbook/screeener.html>



**ENGAGEMENT:**  
**Resources**

# Lead Scoring

Attaching a numeric value to your prospect.



Timeline	Impossible 0	<b>Aggressive</b> 10	Reasonable 20	<b>10</b>
Budget	< \$10 0	\$10k - \$25k 10	\$25k < 20	<b>0</b>
Lead Source	Google Search 0	<b>Referral</b> 10	Existing Relationship 20	<b>10</b>
Project Match	Difficult 0	Medium 10	<b>Easy (I can do it!!)</b> 20	<b>20</b>
Gut Feel	Lose 0	Maybe 10	<b>Win</b> 20	<b>20</b>
<b>TOTAL</b>				<b>60</b>

**POST-SALES:**

# The Hand-Off

After you've successfully signed on a new client, you have to make sure there's continuity between the sales team and the project team.





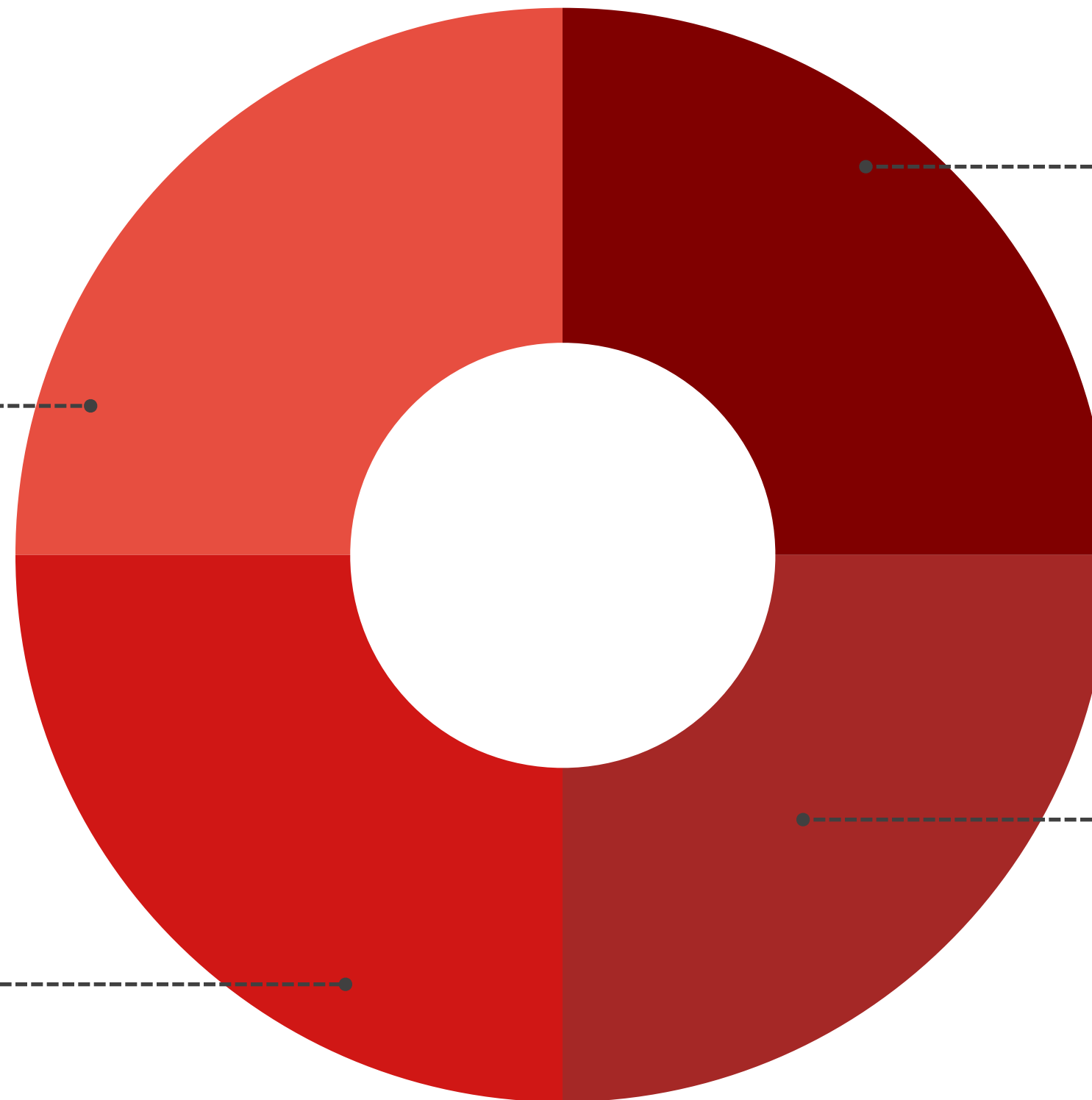
**SALES PROCESS:**

# Client Advocate

Your job is still not finished.

**CHECK-IN WITH CLIENT**  
After you've handed off a client, check in with them on a bi-weekly or monthly basis.

**GET FEEDBACK**  
Ask your client what they liked/disliked about the process. Get feedback from your team as well.



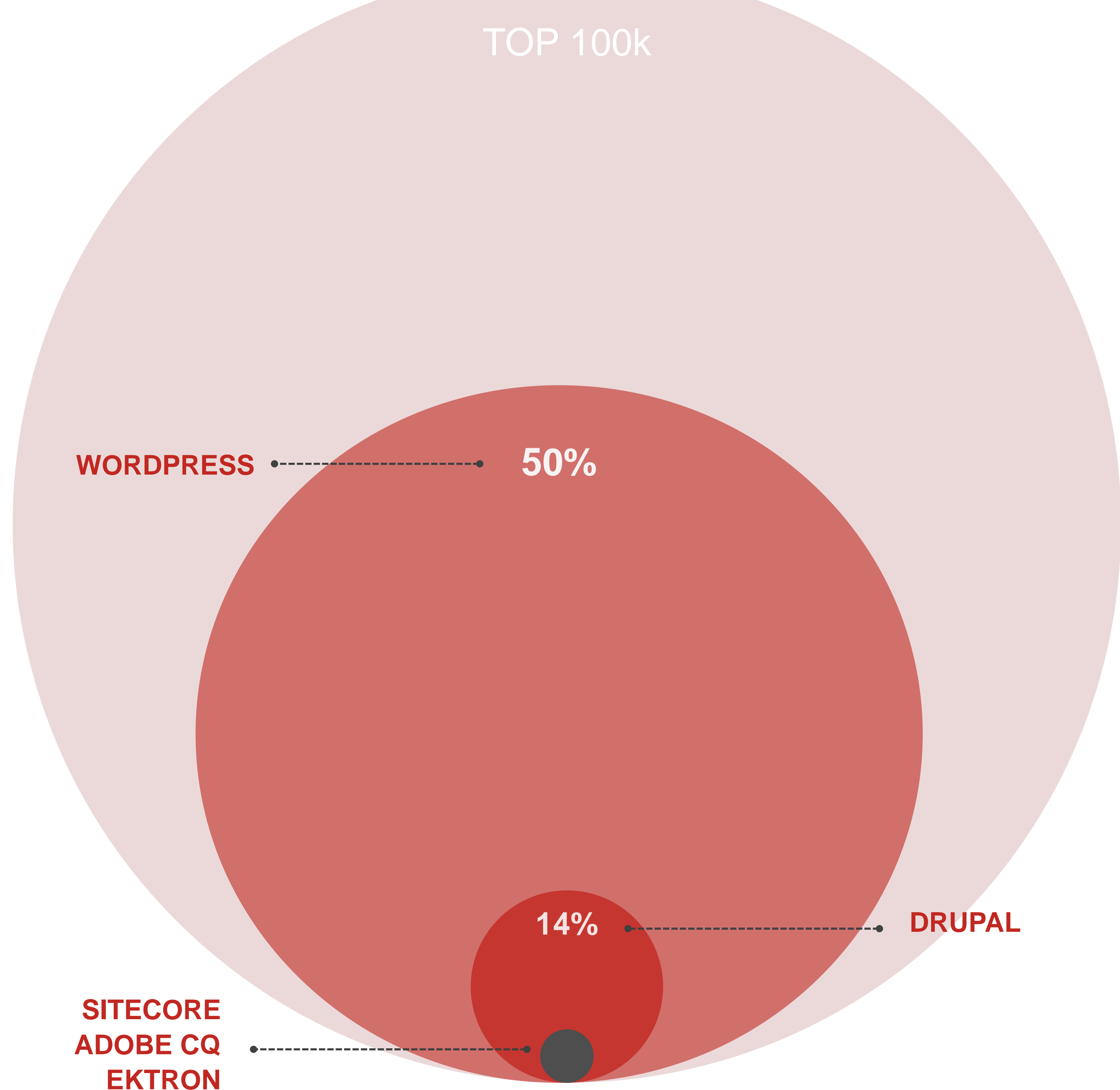
**CHECK-IN WITH TEAM**  
Ask the project team how the engagement is going, were there any unforeseen issues.

**LOOK FOR NEW OPPORTUNITIES**  
Big orgs always have other projects going on, make sure you keep your eyes/ears open.

**SALES:**  
**WordPress**

# Not just a blogging platform anymore!!

Out of the top 100,000 websites on the internet today, 50% are powered by WordPress!



\* Chart data: <http://trends.builtwith.com/cms>

**SALES:**

# Why WordPress?

## Because it's awesome!!

WordPress is a robust, enterprise-level content management system that's ubiquitous, easy to use, scalable, and has a multitude of plugins to extend functionality.



**EASE OF USE**



**GREAT FOR SEO**



**SCALABILITY**



**USER ROLES**



**EXPANDABLE**



**MULTI SITE**



**CONTROL**



**PLUGINS**

**SALES:**  
**Quick Tips**

There are a few things within our control as a salesperson.

## Listening

The greatest trait a salesperson can have!



## Time

Spend it wisely!



## Attitude

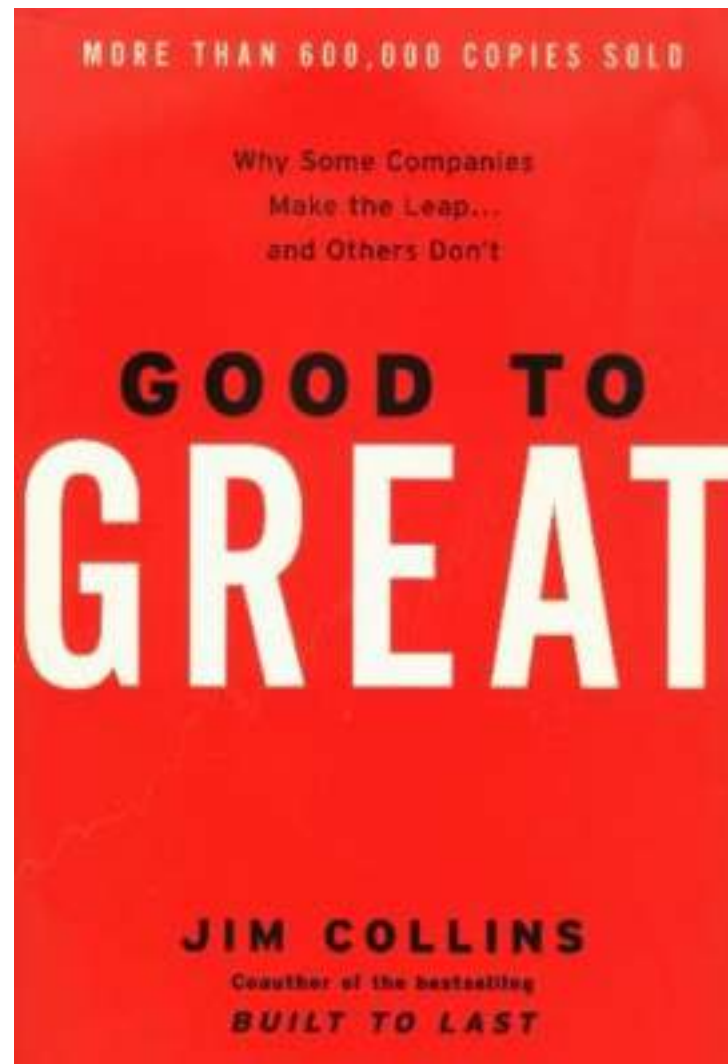
Keep it positive!



**SALES:**  
**Cool Books**

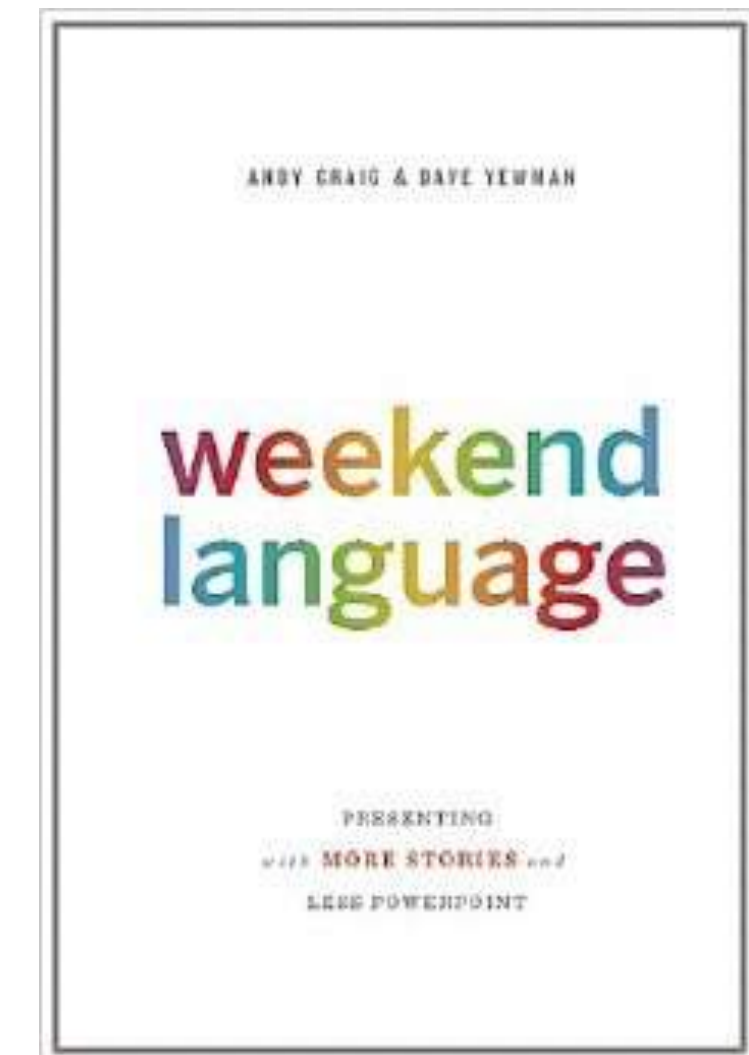
Some book recommendations if you are in sales.

Good to Great by *Jim Collins*



<http://www.amazon.com/Good-Great-Some-Companies-Others-ebook>

Weekend Language by *Andy Craig & Dave Yewman*



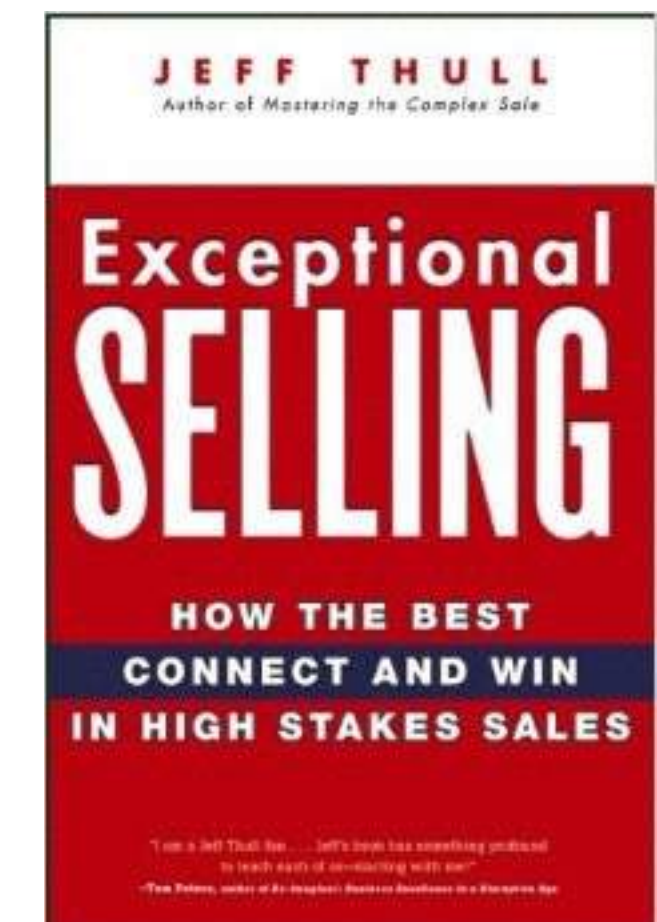
<http://www.amazon.com/Weekend-Language-Presenting-Stories-PowerPoint>

Design is a Job by *Mike Monteiro*



<http://abookapart.com/products/design-is-a-job>

Exceptional Selling by *Jeff Thull*



<http://www.amazon.com/Exceptional-Selling-Connect-Stakes-Sales>

SALES:

## Key TakeAways

### 1. Buyers or Prospects

<http://offers.hubspot.com/free-template-creating-buyer-personas>

### 2. Use technology

<http://www.hubspot.com/crm>

### 3. Qualify your prospects

- Screeners
- Lead Scoring

### 4. Know the essentials for engagement

- Requirement
- Purpose
- Team Member
- Resources

### 5. Become a client advocate

### 6. WordPress is selling!!!

### 7. Listen to prospects, manage your time, and keep your attitude in check

**SUMMARY:**  
Recap

An effective sales process helps ensure a cohesive team and more business for your organization.

**MORE BUSINESS**

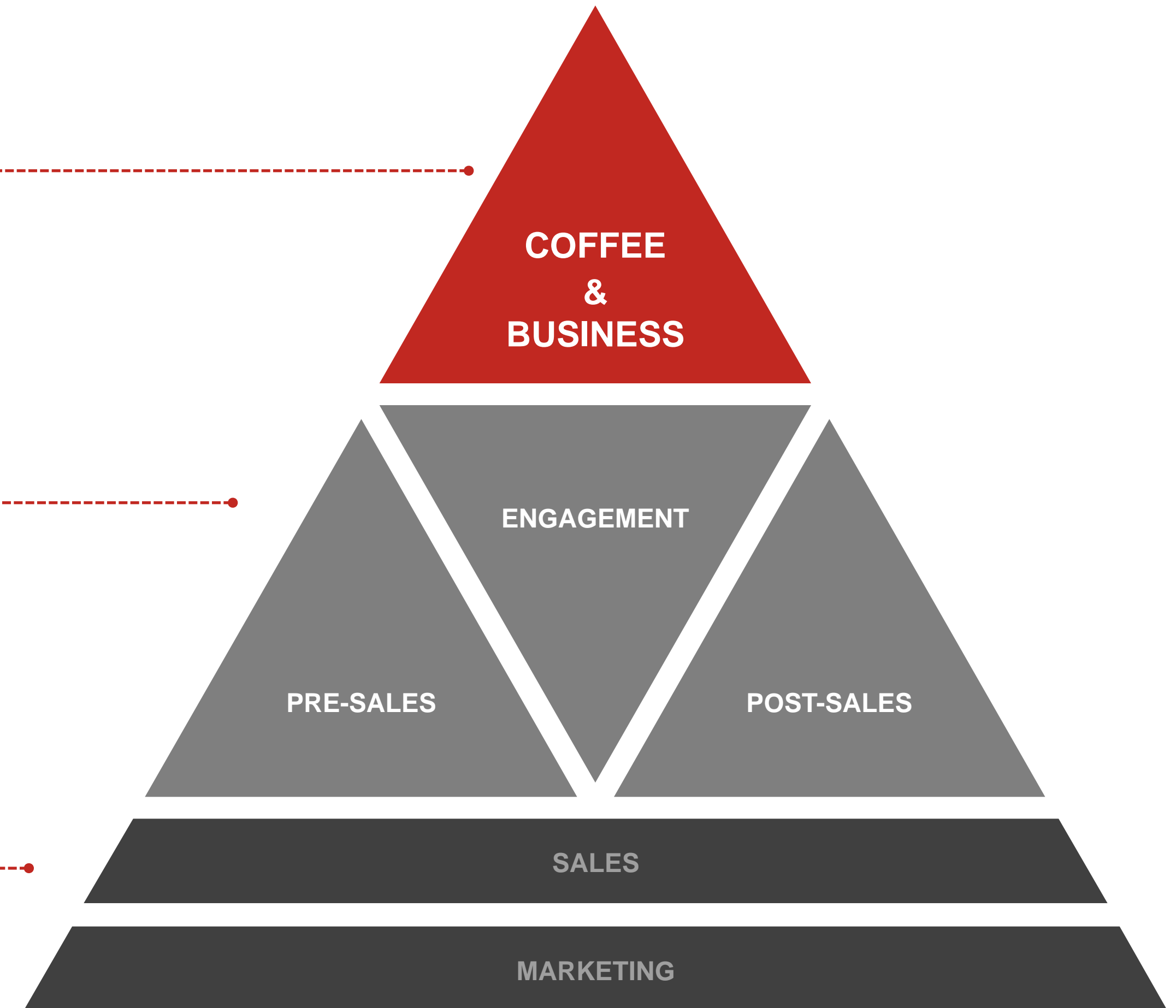
An effective sales process will engage more prospects and close more business.

**THE PROCESS**

Effectively manage the entire sales process from pre-sales into engagement, then onto post-sales.

**THE TEAM**

Sales and marketing work together, don't be afraid to bring in other team members as needed.



Thank You

Check out my blog - [adamlamagna.com](http://adamlamagna.com)

Email me direct - [hello@adamlamagna.com](mailto:hello@adamlamagna.com)

Slides - [adamlamagna.com/pdf/coffee.pdf](http://adamlamagna.com/pdf/coffee.pdf)

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