

## Action plan



### Streamline your sales process

Your sales process is the engine that powers the business. Maintenance and improvements are essential to making sure it runs effectively – and preventing waste. Streamlining your sales process will reduce the time it takes to make sales, allowing you to grow revenue without investing in additional resources.

- **Effort:** High
- **Impact:** High

#### Actions:

**Analyse the current sales process by compiling data on the source of sales and working through a handful of examples of successful and unsuccessful sales.**

- **Impact:** Low
- **Suggested duration:** 7 days
- **Why this will help:** Compiling data on how sales are generated highlights where you should focus your activity. It's common for salespeople to develop their own approach, so it's helpful to take stock of what's working for different people.

**Sense check the impact marketing activity is having on sales and how closely the sales and marketing teams are working together.**

- **Impact:** Medium
- **Suggested duration:** 21 days
- **Why this will help:** Marketing should support your sales team. Getting these two functions to work together effectively will save time and make sure your investment in marketing is paying off.

**Use the research from the first two actions to break the existing sales process down into steps and get feedback from team members about how you can make improvements.**

- **Impact:** High
- **Suggested duration:** 21 days
- **Why this will help:** Once your sales process is written down, you can start looking for efficiencies and making changes to different parts of the process. This document will also provide a blueprint for anyone you're training in the future.

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**Make sure you have the technology in place that empowers sales people and is easy to use.**

- **Impact:** High
- **Suggested duration:** 30 days
- **Why this will help:** It's crucial the information sales people are gathering is captured in a way that means you can learn from it, accurately forecast and leverage the information in the future. You need a CRM that's powerful and easy to use.

**Embed your new sales process by setting Key Performance Indicators (KPIs) that encourage the most effective activity.**

- **Impact:** High
- **Suggested duration:** 10 days
- **Why this will help:** Salespeople are motivated by targets. Setting KPIs that promote activity you know will be effective and encourage people to use your new, streamlined process will help make sure it sticks.

### How will I know if my action plan is working?

**Way to measure success**

Staff satisfaction survey results

**Why this metric?:**

Whether gathered anonymously or not, staff satisfaction surveys help gauge the sentiment of your people as changes are made and impacts felt.

**How do I start tracking?:**

Use an online survey to get feedback from members of staff three and six months after making changes to see what impact it has had.