

Developing Your Sales Process

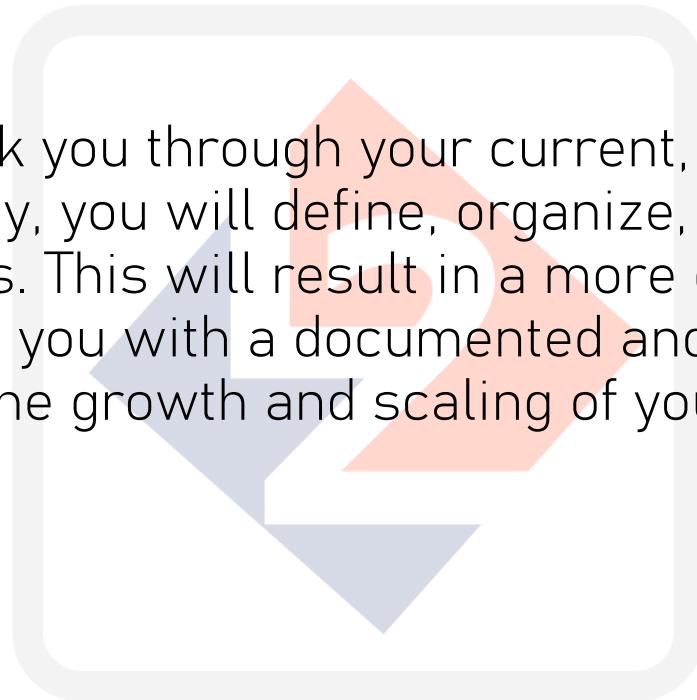
Presented by: Chuck Wiercinski



Level 2
CONSULTING

Developing Your Sales Process: Lesson 1

This course will walk you through your current, home services sales process. Along the way, you will define, organize, prioritize, and improve your sales process. This will result in a more complete customer experience and equip you with a documented and teachable process to aid you in the growth and scaling of your business.



Included with this course

Presentation deck

Worksheets & homework

Lesson audio & video files when available

 [Facebook Group Access](#)

Money back guarantee!

Simply contact me within 30 days of course completion, and if we can't resolve the issue, we will issue a full refund.



Story Time

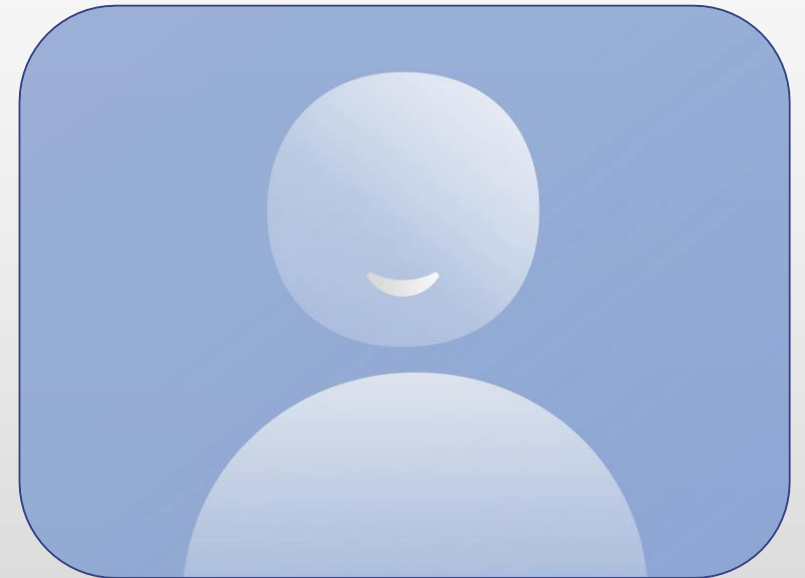


Story Topic

Lesson 1, Part 1: Introduction

4 Lessons

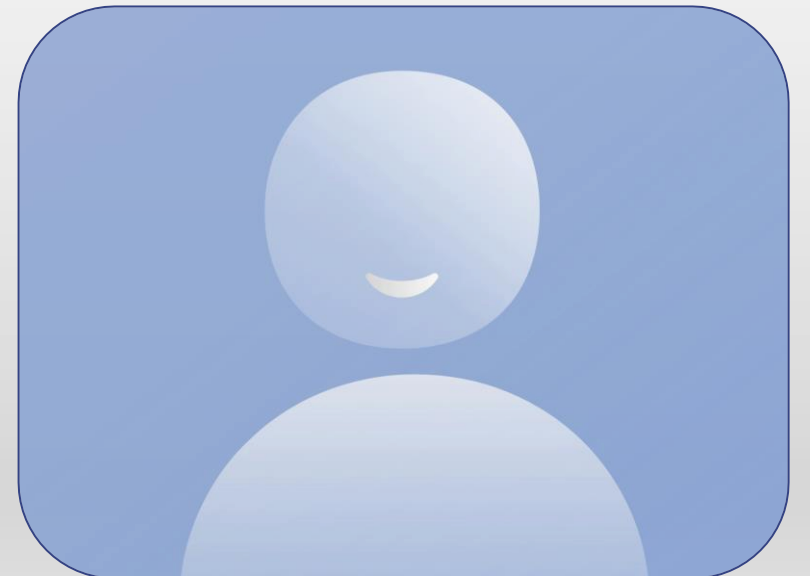
1. **Introduction:** Overview and baseline assessment
2. **Customer Origination:** Setting a great first impression
3. **Offering Solutions & Shipping the Work:** Creating and delivering your promise
4. **Customer for Life:** Keeping the customer engaged after the sale (and if they don't buy)



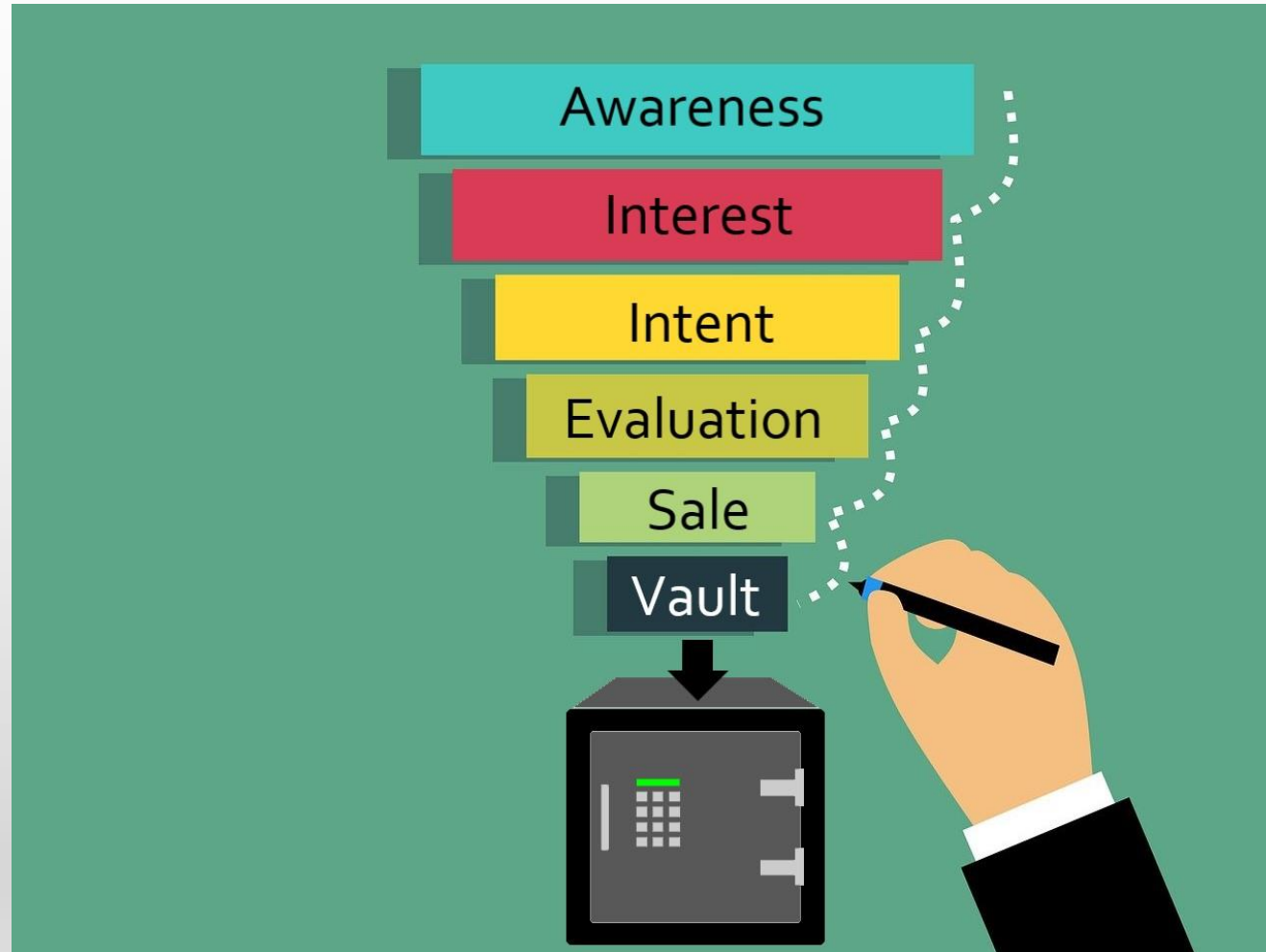
Lesson 1, Part 1: Introduction

Why define or redefine your sales process?

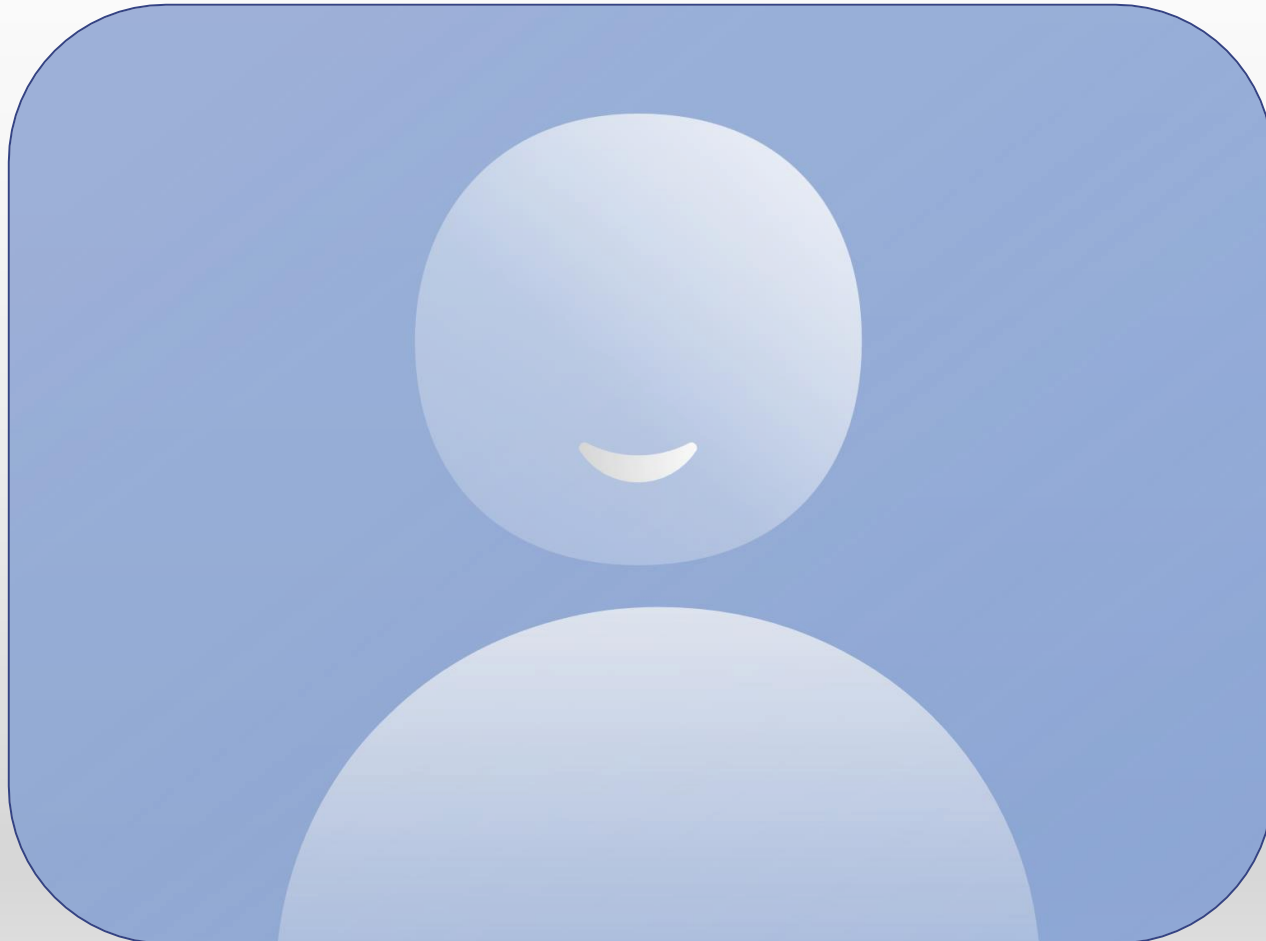
- Understand your customers' journey
 - Walk in their shoes
- Create your process and improve the parts
- Your knowledge and charisma won't scale
- Plug the holes in your sales funnel



Lesson 1, Part 1: Introduction



Self Assessment



Sales Process Baseline Assessment Worksheet (.docx or .pdf)

Score 4	This is a critical point of our sales process that needs to be developed
Score 3	Developing this topic would have a big impact on my business
Score 2	Improving this area would add some value
Score 1	This topic either doesn't pertain to me or needs no further improvement

First Contact: "How does my customer reach me?"		Score 1-4
1.	Webform	
2.	Local phone number	
3.	"800" number or equivalent	
4.	Social platforms	
5.	Live chat	
6.	Chatbot	
7.	Online booking services	
8.	Outside business hours (nights/weekends/holidays)	
9.	Contingency plan for outages	

For call-in customers		
10.	How many rings are acceptable?	
11.	How are missed calls handled?	
12.	Do you use phone scripts?	
13.	What information do you collect every time?	
14.	Customer hold times and reasons established	
15.	Are there multiple line transfers to other departments?	

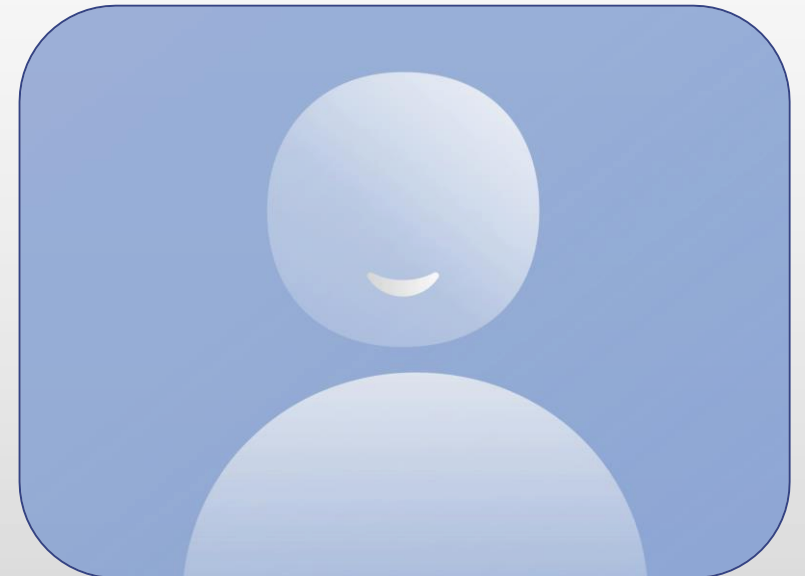
Dispatch		
16.	Lead time from first contact to first visit	
17.	Customer prepared for the visit (told exactly what to expect?)	
18.	Must an adult be present?	
19.	Will all decision-makers be present?	
20.	Do you have a pet policy?	
21.	Are payment expectations set?	
22.	Are they prepared for the next contact? (reminder call, text, etc.)	

<https://level2consulting.com/resources/>

Lesson 1, Part 2: Define Your Baseline

In a world of variables, you must create standards and processes wherever you can

- Start with your sales goals
- Walk through your current sales process
 - Take a moment and write out from beginning to end, what your sales process consists of today
- Take the baseline assessment
- Look for your highest impact points or biggest holes in your funnel
- Set your KPI's and create dashboards

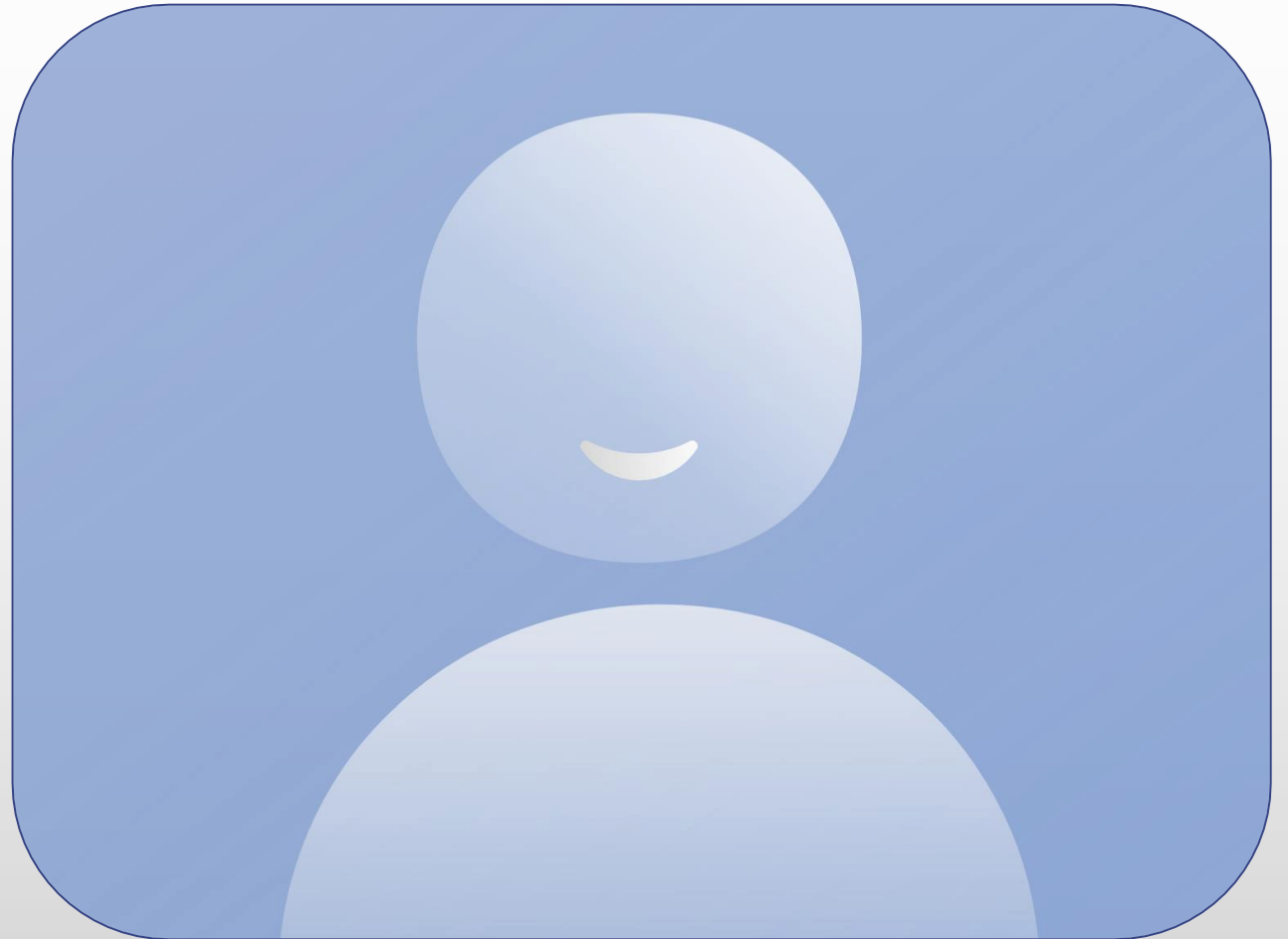


Homework

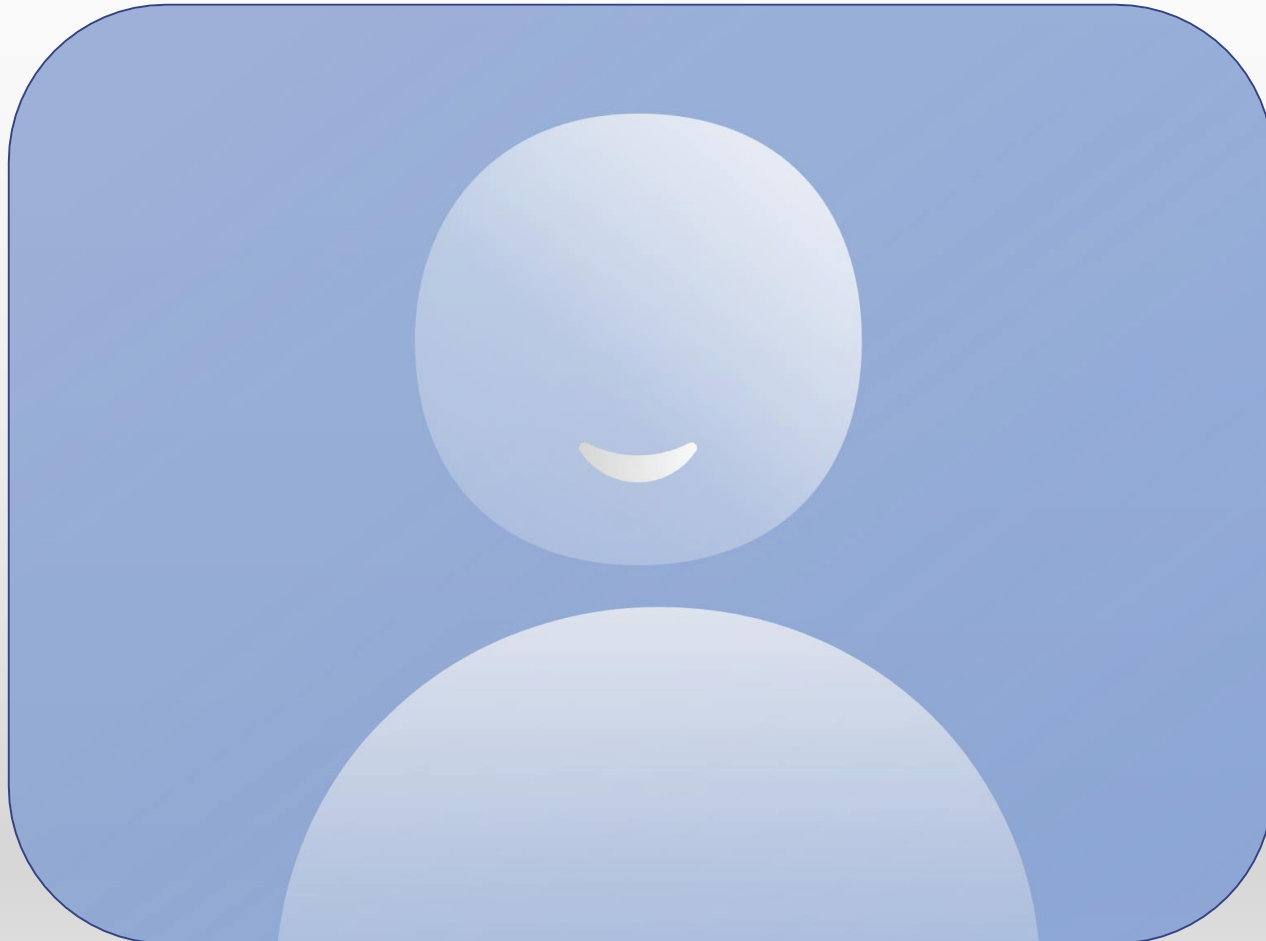
Before you fill out the questionnaire, write down your current sales process.

Include:

- What methods the customer uses to find your company
- How you handle the initial contact(s)
- How information flows from CSR to technician
- Briefly describe the first visit
- What happens with a sale
- What happens with NO sale
- Follow up?
- After the sale



Homework



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Homework

Example:

#7 Online booking services- “Currently, we do not have any form of online booking services. Several customers and friends have told me they love this feature and would use it if we offered it. I love being able to book dinner reservations without disrupting what I am doing. In an ideal world, the customer would be able to look us up on Google and click for available appointment slots and easily pick a time that works for them.”

