Mapping Your Sales Process Checklist

Section A – Foundation & Alignment

- [ ] Leadership backs the sales-mapping initiative and assigns a “process champion” where appropriate.
- [ ] Dedicated BD/team time blocked for workshops.
- [ ] CRM (or spreadsheet) will store all sales data in one place.

Section B – Gather Info

- [ ] Services, differentiators, and past projects documented.
- [ ] Ideal-client profile drafted
- [ ] Prospect-research template (company, contacts, and other pertinent info) created.

Section C – Prospecting

- [ ] Lead-source list (events, referrals, legislation alerts, RFP feeds) compiled.
- [ ] Minimum qualification criteria written (asset type, client type, location).
- [ ] Thinking about a quick-entry method for new leads (so they actually get entered)

Section D – Reach Out

- [ ] Intro-email / call scripts loaded in CRM.
- [ ] Define a cadence (ex: mail, email, cold calls, LinkedIn)
- [ ] Personalization guidelines to give reps freedom within guardrails.

Section E – Identify Need

- [ ] Discovery-question checklist finalized.
- [ ] Meeting-summary email / CRM-note protocol set.
- [ ] Optional: recording + AI transcript tool approved (for summaries and coaching)

Section F – Presentation

- [ ] Proposal templates & content library centralized.
- [ ] Turnaround target (e.g., 2 weeks) agreed upon.
- [ ] Determine what option works best for your specific client (video call, phone call, in-person).

Section G – Close

- [ ] 48-hour follow-up rule after proposal delivery.
- [ ] Negotiation playbook (fee vs. scope trade-offs) documented.
- [ ] Internal kickoff hand-off checklist ready for “Closed-Won” deals.

Section H – Post-Sale

- [ ] Thank-you note template drafted.
- [ ] 6-month check-in task auto-created in CRM.
- [ ] Project-close debrief questions written.