



# Pro Tips

Creating a Sales Process  
that will Drive Results

Ledgeview  
partners

STAGES – MISTAKES & HOW TO AVOID THEM – SELF-ASSESSMENT

# Advanced Steps



- 1 The Stages of the Sales Process  
*How Many Should I Have?*
- 2 5 Common Sales Process Mistakes  
*How to Avoid Them*
- 3 Take the Sales Process Self-Assessment



# What's your Number?



## What are the Stages of a Sales Process, and How Many Should I Have?

The ideal number of stages to have is between four and six, though a majority of companies fall between having four and eight.

Each of the stages you create should show a significant progress in the sales cycle, and should have specific criteria, needed from the buyer, to progress to the next step. Ultimately, the correct number of stages will depend on the specific buyer journey.

If you have multiple sales processes, each process can have a different number of stages. When it comes down to it, a CRM platform needs to mirror the sales process and its stages.

As a sales rep, one of the most important stages of any sales process is engaging the prospect. If you've done a good job investigating the business and have good data, you can make the process a lot easier by engaging their business.

Follow-up. Leave a lasting impression. Relate to the customer. Set the appointment. Close the sale.



“When reps have a great opportunity, they want to tell their sales manager. But, your managers don't want to hear it until it's actually put into CRM. A good rule of thumb to follow is ‘if it's not in CRM, it doesn't exist.’”

- Greg Dove, Director of Business Consulting