BULLETPROOF RESOURCES

Bulletproof Systems Across the Sales Cycle

BECAUSE SYSTEMIZING SALES may be a new concept for some readers, it's helpful to map a typical sales cycle and show where the Bulletproof systems we've shared fit in. This serves as a guide for explaining how Bulletproof systems work throughout a sales cycle, as well as how they generate updates that keep the systems relevant no matter the changes that occur in our market or customers' industries.

Before Contact Is Made

- Pipeline Construction: The verticals of a buyer journey are mapped within a CRM.
- Campaign Construction: Each vertical or deal stage has an omni-channel campaign assigned to it, complete with templates for emails, direct mail, and social media messaging. Call and objection scripts established.
- Prospect Research: 'Qualified prospects' are defined and input into your CRM and prepared for outreach.

Making Initial Contact and Qualifying Buyers

- Outbound contact: Salespeople contact the prospect's organization, identify or confirm decision maker(s), and if the prospect is not able to purchase today but will be purchasing soon, place account into a 'pre-select' hold with a firm follow-up date in the CRM. If able to purchase, move to active opportunity or schedule a sales meeting.

Prior To the Sales Meeting

- Sales Meeting Brief Conducted: Salesperson and manager or peer meet to conduct a sales meeting brief, utilizing their sales meeting brief script to ensure everything needed is available and research is completed.

During the Sales Meeting

- Discovery questions are asked or confirmed, the Bulletproof Offer is presented, and the deal goes to proposal or the next step or a follow-up appointment is confirmed.

After the Sales Meeting

- Post-meeting debrief: Salesperson and manager or peer conduct their post-meeting debrief, utilizing their checklist to ensure all necessary data was gathered. Any Lessons Learned captured.

Weekly Meeting and Systems Updates:

- Sales Huddle: Lessons Learned from previous week's sales meetings, account activity, and salespeoples' notes discussed. Systems are updated or new systems are scheduled for creation.

Pre-Sales Meeting Brief Guide

To be used by salespeople or managers in preparing for upcoming sales meetings. Ideally, research and data are conducted as soon as the meeting is set by the salesperson and entered in their CRM so it can be easily referenced and shared with the sales manager or peer just prior to the calendar appointment with a prospect.

<u>Name of players involved:</u>
Who will the salesperson be meeting with?

<u>Product or service line to be discussed:</u>
Based on past conversations, which types of products or services offered will this prospect most likely benefit from?

<u>Date and location of service and delivery (if applicable):</u>
If the prospect has date-specific needs, have we confirmed calendar availability for delivery, installation, or presentation?

<u>Anticipated Budget</u>:
Based on past conversations with the prospect, what budget range does this account most likely fall within? If no budget is available, consider logging a Lesson Learned on ascertaining budget with discovery questions.

<u>Phone number and location of meeting and who's making contact</u>:
Where, when, and on what platform is the meeting supposed to occur? Who is calling whom? At what number or what meeting link?

<u>Company details</u>:
What do we know about the prospect company that could be useful in determining product or service line, budget potential, and potential lifetime value? Examples: Number of employees, number of clients, physical locations, prospect's average cost of sale to their customers.

<u>Details about the players involved:</u>
What do we know about the people we'll be meeting with? What does their LinkedIn profile and/or a Google search reveal that could be useful in establishing rapport?

<u>Necessary Materials</u>:
What materials have we committed to bring to this meeting and do we have standard materials ready to present if asked for them?

<u>Possible contingencies:</u>
What contingencies should we be prepared for and have a plan to deal with? Examples: No-show to the meeting, minimum budget does not meet our lowest-tier offering, any tech issues we've experienced recently.

<u>Any questions?:</u>

Final moment for the salesperson to ask any clarifying questions to their manager or peer conducting the brief. If a question arises that should be built into an existing or new system, capture it as a Lesson Learned and update the appropriate system or create a new one.

Sales Meeting Debrief Checklist

To be used immediately after a sales meeting has concluded, conducted ideally by the same manager or peer who conducted the pre-sales meeting brief.

Primary Objective: Did we confirm a decision maker(s), discover their decision-making process, and secure agreement to send the Bulletproof Offer proposal to the buyer with a decision deadline?

Secondary objective: Did we confirm a decision maker(s) and decision-making process with follow-up date to send Bulletproof Offer proposal?

Did we:

_____Confirm whether we're dealing with a sole decision maker or committee?

_____Confirm the decision-making process?

_____Confirm buying timeline?

_____Confirm number of employees or prospect customers our product or service could affect?

_____Discover and confirm objectives for our product or service?

_____Discover or confirm upper limit of budget?

_____Review ability to accept Bulletproof Offer pricing or the need to remove items to meet the budget?

_____Offer additional product lines?

_____Confirm follow-up date and time for next point of outreach?

_____If going to a committee for decision, did we offer to customize a message for them and confirm what date it needed to be delivered by?

_____Is the salesperson connected to the decision maker on LinkedIn?

_____If the decision maker asked for a proposal, who is moving this account into an Active Opportunity?

_____If proposal was requested, which departments will be CC'd?

_____Were referrals requested? Received?

_____Did we capture anything that could be considered a Lesson Learned concerning the salesperson, prospect, or sales manager? If so, what?

<u>Debrief the Salesperson</u>

Guiding Question: “If we knew the answers to the questions we asked during that sales meeting in advance or if we could review a recording of that meeting before it happened, what could we have researched, prepared, or brought with us to be more successful?”

Capture any relevant Lessons Learned that would benefit future sales.

Debrief the Prospect

Guiding question: What did we learn from that sales meeting about that decision maker that would benefit another salesperson if they had to meet with that prospect again?

Capture any relevant Lessons Learned and enter account notes for that prospect in the CRM.

Debrief the Team

Guiding Question: Knowing the questions you’d be asked by the prospect, what could we have provided to you that would have better prepared you for success?

Capture any relevant Lessons Learned.

Weekly Sales Huddle Sample Agenda

This agenda can serve as the backbone of your weekly sales huddles with your salespeople. Refer to the chapter on sales huddles for explanations of individual sections.

<u>Opening:</u>
Set start/stop time of the current meeting

<u>Objectives review:</u>
- Review primary sales objective
- Review secondary sales objectives

<u>Pipeline Growth:</u>
- Team pipeline value growth
- Individual pipeline value growth (if review is desired)

<u>Upcoming Opportunity Review</u>
- Deals and meetings coming in the next week or month expected to close

<u>Active opportunity reviews</u>
- Active proposals out that are expected to close

<u>Individual Account reviews:</u>
- Accounts that salespeople have questions about (Capture for Lessons Learned)
- Post-Mortem on lost deals (Capture for Lessons Learned)

<u>Continuous Improvement:</u>
- Lessons Learned
- Record COAs for new systems to handle challenges or innovations discovered
- Review last week's LL's that changed or updated systems and ensure deadlines are being met or overdue ones are updated

<u>Accounts receivable review:</u>
- (If salespeople need to be kept apprised of accounts receivable funds coming in for commission payouts)

<u>Wins for The Week</u>
- Collective or individual wins among the team

<u>Close and Next Meeting Time Confirmed</u>

Bulletproof Selling Lessons Learned
Program Reference Guide

The Lessons Learned program comprises of a 5-column spreadsheet:

Situation:	What did we learn?	Who's responsible for the update?	When will the update be made?	What's the change we're making?

Column 1: Situation
In this cell, include:
1. Date of entry
2. Prospect account name (if a prospect account was involved)
3. Salesperson involved
4. Date of the situation
5. What happened

Example: *9/24/2021. Widget Manufacturer's Account, Bob Smith, CEO.*
Salesperson: Jim Cooper.
On 9/20/2021, Jim conducted a sales call via phone, qualified Bob as a buyer, and issued a proposal for one of their divisions. Jim realized after the call that he forgot to ask about any other divisions in Bob's company that could use our service so was only able to price the proposal for one division. Bob's company definitely meets the size and revenue requirements for follow-on business.

Column 2: What did we learn?
This column answers the question:
If we had to do it over again, what would we do differently with this and all future accounts we encounter this problem in?

Example:
When speaking with a decision maker who sits over multiple divisions, we need to ask about additional opportunity before we end a sales meeting or issue a proposal.

Column 3: Who's responsible for making the change?
This column answers the question:
Who's ultimately responsible for making this change?

Example: *Sally Ross, Training Manager*

Column 4: When will the update be made?
This column answers the question:
What specific date will this system update or system creation be made?

Example: *October 1, 2021*

Column 5: What's the change we're making?
This column answers the question:
What do we do about it?

Example: *Update the sales script to include questions about other opportunities within the organization for our product or service. Update the sales call debrief checklist to include an* *item about 'Did we ask about other divisions or areas in this company that could also use our product or service?'*