



Sales Process Checklist

- Check lead list against database for duplicates
- Ensure lead fits basic prospect requirements
- Make initial contact, complete pre-qualification and schedule appointment
- Research prospect to determine needs
- Identify decision maker at prospect organization
- Identify purchasing process and requirements
- Address prospect objections and questions
- Sign contract with prospect
- Ask customer for referrals and permission to use as reference
- Report sale to sales manager
- Send thank you note to customer
- Follow up to confirm customer satisfaction
- Resolve any questions or problems