

HOW TO SELL - THE ULTIMATE GUIDE

The Latest Tips and Tricks for Your Success in Sales



Proven Formulas For Selling In Today's World

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Tiffani Bova

Global Growth and Innovation
Evangelist, Salesforce



I call it the seller's dilemma: Do we focus on hitting our numbers, or take a step back to build our skills?

When sales reps tell me that they can't carve out time to work on professional development because they're scrambling to hit their sales quota, I tell them: I get it. You're too busy trying to keep your job.

But – ready for a paradox? – the best time to invest in yourself is often when you're "too busy" to do it. These days, I don't carry a quota anymore. Instead I teach others how to crush theirs – as a Wall Street Journal bestselling author, keynote speaker, and growth leader at Salesforce. I don't say this to brag, but to make a point:

I got here by becoming a student of the profession, and committing to my craft.

In the early days of my sales career, I sat across from CFOs trying to convince them to make million-dollar technology purchases, and they were asking me about things I'd never heard of (contra revenue? WIP? what?). So I signed up for a one-day accounting class at UCLA.

It was like watching paint dry. (In sales, we prefer watching ink dry, am I right?). But it was worth it. From then on, when I met with CFOs, I could understand their questions, speak their language, and craft the story of how I could help.

Later on, I found myself struggling to find new opportunities. I had focused so much of my energy on closing complex deals that I got rusty on the basics, like cold calling. So I read a few sales books, kept tabs on my network, attended a "solution selling" course – and I practiced.

Within a few months, I hit my stride again. I got smarter about where to spend my energy and it paid off. While others on my team struggled to make quota, I hit (and even exceeded) my numbers.

Fast forward 25 years, and I've got a career I love. Like so many of you, I was thrown out into the field and left to figure out how to be a professional seller on my own. Back then, there was no internet, no social media, and no Salesforce. It was a single-user version of Act! or GoldMine with a little bit of Excel and bubble gum holding it all together. Ah – those were the days!

What made all the difference was my conscious choice to invest in myself, even when no one else would. Now, my greatest mission is to inspire others to do the same.

That's why we created *How to Sell*, a complete guide to sales. It walks you through the fundamental skills you need as a modern seller. So you never have to go it alone.

How to Build A Sales Process That Lands Deals Every Time

Learn how to successfully land a sale, from prospecting to closing the deal.

↶ Click to navigate the chapter



What We'll Cover:

- ➔ [What is the sales process?](#)
- ➔ [What are the main sales process steps?](#)
- ➔ [What are common sales process mistakes?](#)



What Is The Sales Process?

The sales process is a series of steps that move a sales rep from product and market research through the sales close – and beyond.

The number of steps in the sales process may vary depending on a rep's industry, product, and prospect, but include four key stages:



The sales process covers four stages, from early research through long term relationship nurturing.



What Are the Main Sales Process Steps?

Whether you're an experienced sales rep or new to the profession, the following steps will guide you through a successful sale. Tweak or add steps as needed to accommodate your business, product, or prospect.

01

Build Product Knowledge

Until recently, sales teams and product experts worked in isolation. If a sales rep struggled to answer a product-specific question during a sales call, they referred the prospect to an internal product manager. Today, clients expect sales reps to know their products inside and out. This streamlines the communication, improves customer relationships and accelerates the sales cycle.



The best way to learn your products is by reviewing product demos, press releases, and documentation. Ask developers or product managers questions about functionality, use cases, and potential pitfalls. Write your own notes highlighting standout features and the problems they solve for customers.



With the myTrailhead learning platform you can create and follow custom product courses, earn awards, and track progress.

[Learn more](#) →



02

Research Your Ideal Prospect

Many companies create a buyer persona that highlights demographic, behavior and interest-related information about the ideal prospect.

If you don't have access to a buyer persona, spend time researching your target market.

Here are key questions to guide your research:

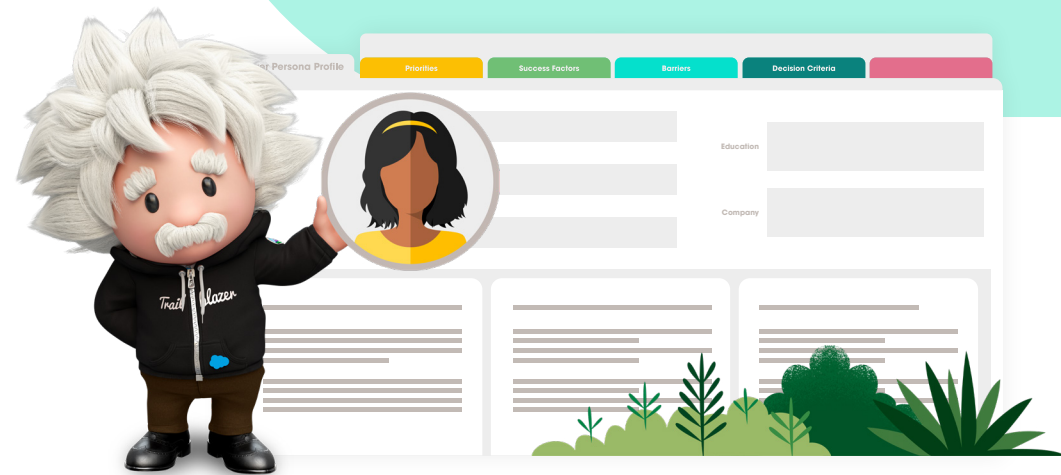
- ✔ **What buyer data** do I already have that can help me outline the ideal prospect?
- ✔ **What unique needs** does my product or service address, and who has these needs?
- ✔ **What are the characteristics** of prospects targeted by my competitors?
- ✔ **Where do my ideal prospects live**, and how do they engage with businesses like mine?



Talk to tenured sales reps and managers about customers with whom they've worked and collect information about their needs, and pain points. To round out your research, use a competitor research analysis tool to learn what strategies bring in the most business for competitors - and how you can make use of them to find prospects.

With Einstein Relationship Insights, you can use automated workflows and digital assistants to conduct research and score prospects to see which are the most likely to convert.

[Learn more](#) ➔



03

Prospecting and Lead Generation

Prospecting is the process of finding individuals or businesses that are good candidates for a sale.



Start by asking fellow reps or industry connections for referrals, then peruse online portals and communities for viable prospects. Search for product or **industry keywords** on engagement platforms like LinkedIn, then move to trusted, niche sites that prospects commonly use for product research.



To collect more information about needs and pain points you can visit sites where potential prospects are engaging via comments or forums. When you identify a prospect you'd like to pursue, find them on LinkedIn or ZoomInfo and collect all available contact details.

You can supplement these efforts with inbound lead generation campaigns, to pull interested contacts into your pipeline via display ads, paid search ads, and social media ads. Work with your advertising or marketing teams to create these campaigns. Lastly, make the most of your CRM to streamline the prospecting process.

04

Qualify Prospects

Not all prospects are equal. Before you invest time in your pitch, you need to verify that your product is a good match for the prospects you've identified. This requires a qualification call.

The qualification call collects basic information about Budget, Authority, Need and Timeline (BANT), that allows you to identify the prospects that are most likely to buy.

Focus on the following key questions during the call:

- ✔ What does the prospect need, and does this need align with your product?
- ✔ Do they plan to make a product purchase soon? If so, when?
- ✔ How much do they have to spend on your product?
- ✔ Who has the authority to make the purchase?

Don't make your conversations feel like an interrogation. Treat your prospect like you would your best friend.



Cynthia Barnes, founder, National Association of Women Sales Professionals (NAWSP)

05

Analyze a Customer's Needs

Once you've narrowed your list of viable prospects, take a deep dive into the needs of those who remain. Set up another call with each prospect to further understand what they need and how you might meet that need (known as a discovery call).

95% of buyers make purchase decisions based on emotion, so understanding a prospect's emotional levers is key.

Below are a couple of probing questions that can guide the discussion:

- ✔ What pain points or problems do you have right now?
- ✔ How have these problems affected your day-to-day work or life?
- ✔ What's preventing you from finding lasting solutions?
- ✔ If you implemented solutions that didn't work, why didn't they work?
- ✔ What would an ideal solution look like?

Once you have answers to the questions above, you can easily identify products that will solve prospect problems. If a prospect doesn't identify a problem that can be solved with your product, remove them from your list.

06

Lead a Sales Call

It's finally time to present your product as a solution to the prospect's problems.

To prepare your sales call, tailor your pitch to the prospect and write out likely objections, and prepare responses that will overcome these objections. Send a quote or ready-to-sign contract to the prospect before the sales call to ensure they have everything they need to sign on the dotted line and close the deal as quickly as possible.

During the sales call, make sure you stick to a discussion of solutions, not product features. Be careful not to launch into a defense when you hear objections, and take the time to ask for additional details and context so you can understand the root of the problem. Lastly, suggest a timeline for next steps at the end of the presentation. This should include any follow-up calls and a proposed deadline for the sale to close.

Objections to the sale will happen, so prepare in advance for the most likely ones.



PRO TIP

The Feel, Felt & Found Formula

Prepare your responses to objections with the “Feel, Felt, Found” formula:

“I understand how you feel. Others have felt the same way about [our product].

However, they have found that [our product] is worth the money/time/energy because [reason].”



07

Follow Up and Close The Deal

Immediately after the sales call, follow up with the prospect: summarize the conversation, provide additional information that was requested and reiterate the next steps.

The prospect may respond with additional questions about your product. Answer these right away and urge them to make a purchase decision by the date specified during the sales call. You can make this easy by sending a PDF contract with an electronic signature.



08

Nurture the Relationship and Upsell

If all goes well, your prospect is now a customer. Congratulations! However, the sales process isn't over yet. Satisfied customers provide a huge opportunity for cross-selling and upselling.

Upselling isn't just a sales tactic; it's a customer happiness tactic that can help you build deeper relationships with customers by delivering more value.

Alex Turnbull, CEO and founder, Groove

Barnes' formula of 3s makes this easy:



Common Sales Process Mistakes

We want you to succeed. This means you need to avoid some of the common mistakes that derail the sales process. Here are some tips on how to avoid them.



Poor Preparation

Research is key to successful sales. When done correctly, it allows you to speak confidently about what you're selling and what problems it solves. When done poorly – or not at all – prospects lose confidence in your product and business. Take the time to understand both what you're selling and your target audience to be able to address unique problems and value propositions.



No Needs Analysis (Discovery) Call

Many reps think that a qualifying call is sufficient background to pick out the best prospects on their list. In most cases, however, this call is very high level and doesn't adequately paint the picture of a prospect's needs.



Making A Sales Pitch Before Qualifying Leads

Many eager salespeople are so focused on quotas and commissions that they forget the qualifying and discovery calls and launch straight into the sales pitch. The result is often a dead end – the unvetted prospect has little interest, insufficient budget, or is not empowered to make buying decisions.



Highlighting Product Features, Not Value

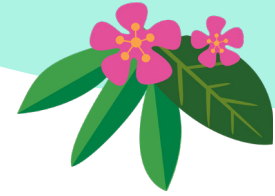
It's common for reps to lead a sales call touting product features. The problem is, prospects aren't looking for features. They're looking for solutions and value.



Sell the benefit, not the company or the product. People buy results, not features.

Jay Abraham, Executive Sales Coach





Being Unempathetic

Laser-focused on closing deals, reps can come across as pushy. Nobody wants to make a buying decision under pressure. Don't think of your prospect as a potential client. Think of them as a friend. Listen to their problems with empathy. It builds trust and loyalty, which makes a purchase decision easier.



Talking Too Much

Reps who consistently close deals listen more than they talk, as constant talking alienates prospects and scuttles once-promising deals. In fact, many studies have demonstrated the negative impact of talking more than listening during sales calls. Experts recommend a 60/40 split in favor of listening. This gives reps enough time to share value-based insights while making sure the prospect is heard.



Being Unprepared For Objections

There are countless potential objections to a sale: cost, bad timing, insufficient need, lack of product functionality, and so on. These objections are often easy to anticipate. Unfortunately, many reps struggle to close sales due to common objections they don't know how to overcome. The best solution is to map out all likely prospect objections, using Barnes' "3 Fs Formula" to prepare empathetic and impactful responses.



Making Sales Calls Too Long

In the era of virtual selling, sales leader and consultant Larry Long Jr. notes reps struggle to keep calls short enough to retain prospects' attention. The result, he says, is poor engagement and waning product interest. Fortunately, the solution is easy: Keep your calls (in-person or virtual) to 30 minutes max. This forces you to avoid tangents and focus on sales-critical information.





Waiting Too Long To Follow Up

“The longer you wait to follow up with a prospect after a sales call,” cautions Barnes, “the colder the sale becomes.” Lazy or distracted reps sometimes leave days between the sales call and their follow-up email. By that point, the interest generated in the product has faded, making the close far more difficult. Avoid this pitfall by sending follow-up messages immediately after your sales call.



Make The Sales Process A Cinch With Sales Cloud

Take advantage of research tools, automatic communication logging, and real-time pipeline data all on one platform.

[Learn more](#) →



How to Do Sales Prospecting the Right Way

Whether you're a beginner starting out or an expert hoping to level up, you'll want this primer on sales prospecting.

↶ Click to navigate the chapter



What We'll Cover:

- ➔ What are the stages of the sales prospecting?
- ➔ How do I find new sales prospects?
- ➔ How do I approach a new sales prospect?
- ➔ How do I qualify a sales prospect?
- ➔ How do I move sales prospects to the next stage in the sales cycle?



What Is Sales Prospecting?

Prospects are possible customers, and prospecting is finding possible customers. Sales reps use prospecting to expand the size of their potential customer base.

They'll reach out to leads (potential sales contacts) and nurture them into "opportunities" (leads who have been warmed up over time). There are various sales prospecting techniques, from making calls to sending direct mail, attending networking events, and connecting on social platforms like LinkedIn.

The Stages of the Sales Prospecting Process

The sales process goes from cold leads to warm opportunities to red hot deals. Prospecting is what happens in between:

FROM LEADS

Sales and marketing source leads.

Leads are unqualified prospects. Leads can come from marketing (think a webinar that requires a form fill) or sales (think cold outreach).

TO OPPORTUNITIES

Sales qualifies leads into prospects.

Sales gets to know leads and decides whether they're a good fit for the product. If they are, the lead is "qualified" to become a prospect.

Sales nurtures prospects into opportunities.

As sales makes prospects more interested in the sale, these prospects become "opportunities" who are more and more likely to buy.

TO CUSTOMERS

Sales closes opportunities into deals.

In the end, after many conversations, there will be two kinds of opportunities: "closed-lost" (boo) or "closed-won" (yay!).

How Do I Find New Sales Prospects?

When it comes to sourcing prospects online, LinkedIn is the biggest game in town.



Stephanie Svanfeldt
Strategic Account Executive, Salesforce

We could talk about all the different platforms out there, but we focus on LinkedIn, as this is the most important platform used globally. Here are some tips to get going:



Follow the Prospect Before You Connect.

Unless you're sending InMail, which is a sponsored message, you'll need to get connected with prospects before you can message them on LinkedIn. Follow them and comment on, like, and share their status updates to work your way into their world.



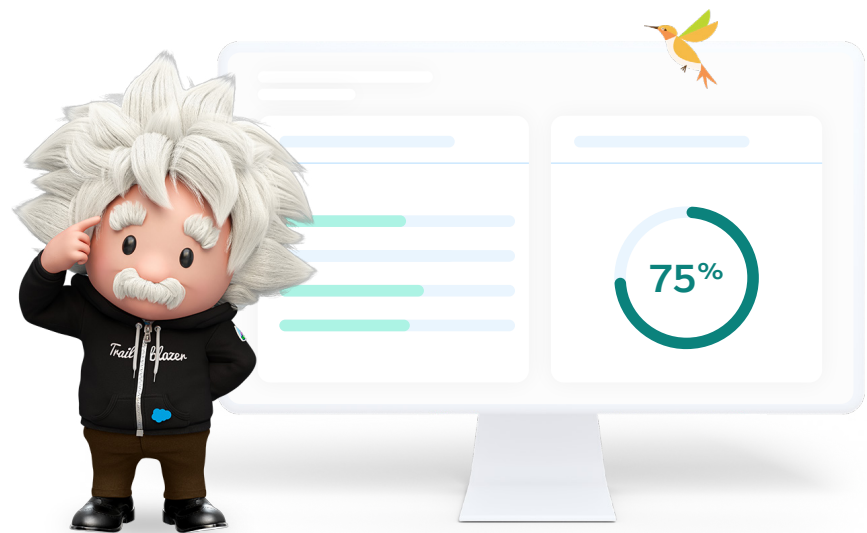
Hype Them Up.

Follow the prospect's activity and show that you're interested in your prospect's ideas. You can also look at the information they highlight on their profile – like courses, presentations, and thought leadership – and “endorse” them for skills that matter most to them.



Find Them In Groups.

Joining a group where your prospect is active can give you a shortcut to getting connected. Look for the groups they belong to on their profile and join relevant groups as well, to chime in on the group's posts.



How Do I Approach a New Sales Prospect?

We need to be relevant when we reach out.



Stephanie Svanfeldt
Strategic Account Executive, Salesforce

The trend of personalization is coming to sales. How can you stand out from the crowd? How can you find an authentic common ground that gives the relationship traction? Here are some steps to take:

Lean On Customer Relationship Management (CRM).

Sales prospecting is harder than it used to be, now that we need to be more relevant and personalized with every approach. We need technology to close the gap. CRM gives you a control room for all your interactions with your prospects – the last email you sent, notes from your meetings, and the pitch deck you presented – so all the information you need is at your fingertips.

Research Your Way Into Their World.

Research is the groundwork. If it's a publicly traded company, read their investor reports. If it's a small or medium business (SMB), then set up Google alerts to learn about their press. Try to learn about problems and people, so by the time you reach out, you're saying the right things to the right person.

Find the Channel That Sticks.

Everyone is different. Every approach needs to be different too. Some of us are old school and like to talk on the phone. Some of us live in our inboxes. How can you find the right channel? The answer is to leave no stone unturned. If the prospect doesn't pick up the phone, try connecting on LinkedIn. Still no luck? Craft an email that grabs them. Keep working on the interaction until you see a spark.

Sales Cloud makes it easy to connect with prospects and grow.

[Watch a demo to learn how](#) →





When the goal is simple — increase sales without increasing costs — the solution is also simple. Turn your focus to prospecting. Expand your customer base and create real growth."

Orlando Gadea Ros

Stanley Black & Decker



How Do I Qualify a Sales Prospect?

Everyone you talk to is important – because if they're not the right person to talk to, then they can point you to the person who is.

Qualifying a prospect is an important piece of the puzzle. Here are some questions to help you qualify whether a prospect is a good fit:

Is This the Right Person?

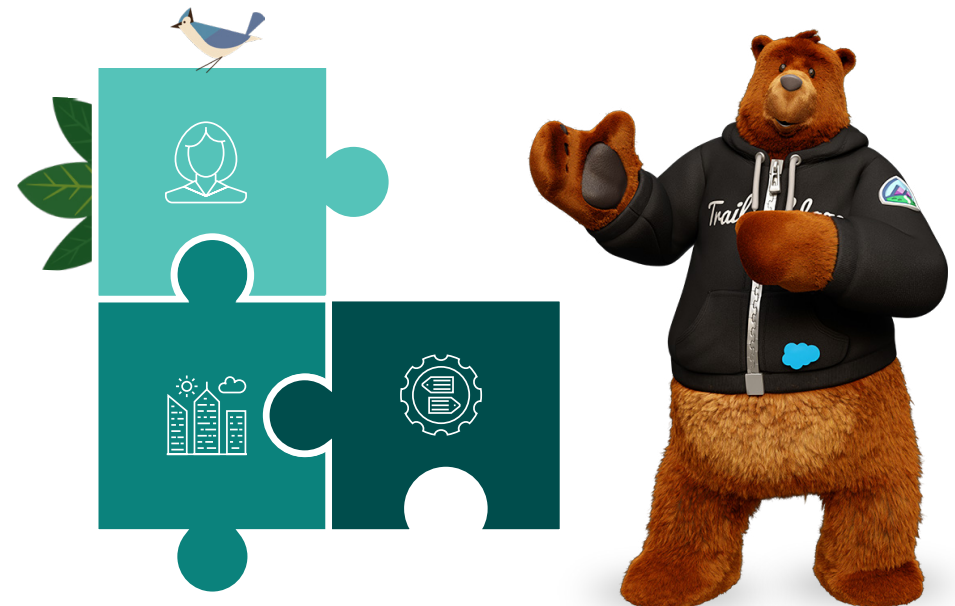
- ✓ Does the prospect match your ideal customer profile?
- ✓ Are they already interested in your product?
- ✓ Can they influence the deal, or even decide to buy it?

Is This the Right Company?

- ✓ Is it in your territory?
- ✓ Is the industry a good fit?
- ✓ What's the size of their organization? (Don't just think of how many employees they have, also think about the size of their consumption.)

Is This the Right Project?

- ✓ Is the department funded to pay your price?
- ✓ Will the project be a priority this year for the company?
- ✓ Will the team be using the product for the right use case – in a way that will create an impact?



How Can I Move Prospects to the Next Stage in the Sales Cycle?

Research is important, but you'll need more than that to take the conversation to the next level.

After all, it's just as easy for prospects to research us as it is for us to research them. We won't get anywhere with them by repeating the same general information.

You'll need to learn their accent – not just their language – and become knowledgeable about their lives at work. That means learning about specific trends in their industries, their companies, and even their lives.



Take your very best practices for prospecting and set them into motion at scale. Sales Cadences lets sales managers set steps to follow – things like: when to email versus call, what call script to use, and what material to send if prospects say no.

[Learn more](#) →



I cannot know your pain unless I know your industry. Am I going to say: “Hey, the pandemic was rough.” No. I’m going to say: “Hey, I know your tenants are asking for rent extensions, there’s a gap in your supply chain, and it’s getting harder to communicate with your employees. Let’s talk.”



Stephanie Svanfeldt

Strategic Account Executive, Salesforce



How to Get Your Sales Pipeline to Flow And Grow

Pipeline management lets you catch tiny problems before they become big.

↶ Click to navigate the chapter



What We'll Cover:

- ➔ [What is a sales pipeline?](#)
- ➔ [What are the stages of a sales pipeline?](#)
- ➔ [How do you build a healthy sales pipeline?](#)
- ➔ [How do you evaluate a sales pipeline?](#)



What Is A Sales Pipeline?

A sales pipeline is a visual representation of where your prospects are in the sales process.

With it, you can estimate how much your reps might close in a given week, month, or quarter. This allows you to determine the health of your business.

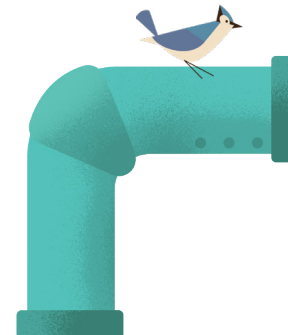
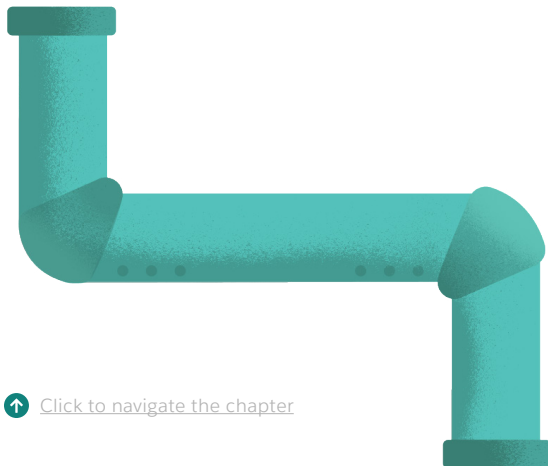
Imagine a pipeline as a free-flowing river. If there are problems upstream, there will eventually be problems downstream. Pipeline management allows you to catch tiny problems before they become big problems that impact revenue.



PRO TIP

Don't confuse a sales pipeline with a sales forecast.

A sales pipeline focuses on the present moment and what reps should be doing **right now** to close deals. A sales forecast estimates how much revenue a company might bring in if those opportunities are indeed won.



What are the stages of a sales pipeline?

1 Prospecting

Sales prospecting is the search for potential customers or buyers of your product, and it involves a lot of research and outreach. There's outbound prospecting, where you do cold outreach to folks you might have found from doing research on LinkedIn or Google, and there's inbound prospecting, where you reach out to someone who has already expressed interest in your product through visiting your website or signing up for your newsletter.

2 Lead qualification

Don't spend precious time and resources on a deal that never closes. Instead, focus on qualifying, or filtering out, your leads by creating an ideal customer profile that outlines the characteristics of the customers you'd like to bring in. To move leads deeper into the pipeline, you can consider offering an e-book or other type of free resource to determine if the prospect is interested. It's also helpful to conduct a preliminary discovery call to get to know the prospect's needs before you launch to the next step of a sales call.

It's easy to get prospects interested in a new feature or functionality, but to get them to prioritize and fund it is the tricky part.



Hassan Abdalah
Account Director, Salesforce





3 Sales call, demo, or meeting

This is when you start to go in for a sale with a demo or meeting. Make sure everyone involved understands the goal of this meeting and bring in all your collective insights to build a business case that demonstrates how your product will help your prospect achieve their goals.

4 Proposal

This stage is when you make an official sales offer. You summarize how your company can address the potential customer's pain points, reiterate pricing information, and demonstrate why the business value of your product more than offsets its cost. This is also when you'll spend time differentiating your proposal from the competition.

5 Negotiation and commitment

The prospect will likely have objections or additional inquiries that require renegotiating the initial proposal. Discuss expanding or shrinking the scope of work, adjusting pricing, and managing expectations to come to a final agreement.

6 Contract signing

Pop some bubbly because you just closed a deal! Make signing the contract simple by using an e-signature service that allows your soon-to-be-customer to sign and upload from anywhere.

7 Post-purchase

When you close a deal, you might think that it's all over, but the customer experience has just begun. The buyer will expect attentive service and regular monitoring of the account's progress. At the right times, you can cross-sell existing customers on new services and upsell them on premium solutions. Overall, be sure to treat your new customers well – referrals and future sales depend on it.



PRO TIP

Personalization

You want the prospect to know that you understand their company inside and out, so make sure you're not giving them a one-size-fits-all proposal but rather tailoring it to their specific pain points.





You need to take ownership of that account because if you aren't following up, it's up for grabs for someone else to take over. Make sure you're always moving the conversation forward."



Galem Girmay

Sales Executive, GoContractor



How Do You Build a Healthy Sales Pipeline?

A healthy pipeline flows: prospects are moving from one stage to the next in a determined time frame, or they are filtered out.

Reps can build a healthy pipeline by consistently bringing in fresh leads, qualifying those leads, nurturing leads to generate interest, and, ultimately, closing sales. This flow can be tracked, managed and reviewed in a system for Customer Relationship Management (CRM).



Qualifying Leads

We touched on this earlier: it's important to find out if someone is a good fit for your product by qualifying the lead. Each company will have different criteria for what counts as a good lead, with many companies even using a lead scoring system to prioritize leads based on how likely they are to purchase.



PRO TIP

Use AI-Capable Tools to Analyze and Sort Leads

In the past, lead scoring was a manual process. But with vast quantities of customer information to be analyzed, this becomes more difficult without tools. Use lead scoring software, like that offered by Sales Cloud, to reduce manual lead analysis.

[Read this blog to learn more](#) ➞





Nurturing Leads

Nurturing leads is developing and reinforcing a relationship by providing powerful insights that build trust in your solution.

There are multiple ways to accomplish this, but it's cost-effective and easy to automate with email marketing tools like Pardot. You can send leads relevant content, whether it's blogs, videos, white papers, or e-books, and email marketing tools allow you to track how long a prospect is engaging with the material. No matter how you do it, it's important to keep the water warm with consistent follow-up and outreach.



Converting Prospects Into Customers

Guiding prospects down the pipeline until they've become customers is known as conversion. For each interaction you have with a prospect, be thinking of next steps.

Focus and persistence are key when it comes to moving the conversation forward. Follow up, ask for feedback, and make use of a CRM so you can supervise prospects at each stage. Much of what happens at the end is decided by what you do at the beginning. If you've laid successful groundwork in qualifying and nurturing leads, this third step should flow naturally.



Top-heavy and bottom-heavy

A healthy pipeline always has new opportunities entering and won opportunities exiting. A pipeline that's top-heavy has a lot of opportunities coming in, but not enough of them making it to the final stages. A pipeline that's bottom-heavy will have plenty of deals closing, but not enough new opportunities entering at the top of the funnel. Either scenario means lost revenue.



How Do You Evaluate a Sales Pipeline?

A good pipeline will have high sales velocity, a short sales cycle length, and a high conversion rate. Your data can paint a clear picture to get a handle on this.

You have to stay grounded in data. If the data's not clear, just say it's not clear. That's really how you de-risk and run good pipeline management.



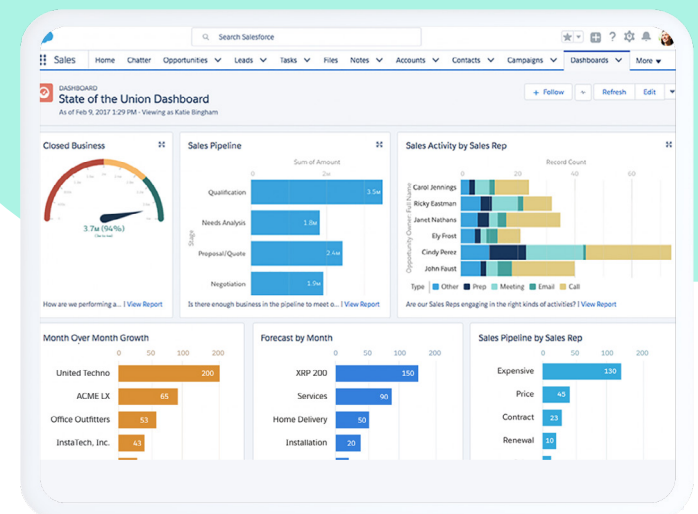
Marcus Jewell
Chief Sales Officer, Juniper Networks

A pipeline needs accurate data on prospects in order to be meaningful: you cannot lean on anecdotes to determine the status of leads in the pipeline. This data can change from minute to minute, which is why it demands constant monitoring. By tossing dirty data and adding updates whenever a new lead comes in or a prospect progresses to another stage, you'll keep your pipeline well-oiled.



Unlock the power of Sales Cloud to visualize the pipeline and see which stage deals are in.

[Sign up for our free demos to learn more](#) →





Here are some of the most important ones:



Lead Source

How did prospects find out about your product? Was it through an email campaign, a print promotion, and so on? Once you start paying attention to these sources, you might discover that some have a higher conversion rate than others.



Industry

Buyers from a wide range of industries might be interested in your product, but is it a bit more popular in certain industries? Tracking this metric will help suss that out.



Deal Size

The budget of every prospect will be different. Some might be ready to drop six figures, while others won't be able to afford your product at all. Keep this in mind when you're personalizing and prioritizing pitches.



Decision Makers

Do you have a direct line to the folks who will ultimately call the shots? If not, how can you connect with the decision maker?



Conversion Rate

Not every qualified lead turns into a customer. To accurately forecast, you need to know what percentage of opportunities end up progressing from stage to stage. If you're trying to close 500 deals by the end of the quarter, and your conversion rate is 10%, you need to have 5,000 opportunities in your pipeline to meet that goal.



Sales Velocity

How much revenue does your team generate each day? Sales velocity helps you measure this by examining the speed at which a deal moves through your pipeline. A low velocity indicates pipeline bottlenecks.



Sales Pipeline Value

Tally up the dollar value of every deal in your pipeline. This number helps you determine the return on investment of your team's efforts.



Sales Cycle Length

How much time passes between a rep qualifying a lead and then closing that deal? This allows you to estimate how many opportunities might close in a given time period. It's also a good measuring stick for the progress of a deal.



Get to know what the life of your rep is like in terms of managing the process. Then make sure that process is as easy as it possibly can be.



Marcus Jewell

Chief Sales Officer, Juniper Networks



How Do You Work With Reps to Improve The Sales Pipeline?

Your CRM should be your best friend when it comes to measuring and managing your sales pipeline, but don't underestimate the importance of frequent communication with your reps.

Regular pipeline reviews, when managers and reps discuss the status of pending deals one-on-one, should be seen as an opportunity to realign goals and to get additional coaching - instead of being a dread.

When properly done, pipeline meetings can accomplish several things:

- ✔ Create a system of accountability for both sales reps and sales managers
- ✔ Establish action items and deal priorities with a specific timeline
- ✔ Confirm the exit criteria for every pipeline stage

Managers have to practice empathy and patience in order to build trust with reps. This allows reps to better learn from mistakes, improves morale, and ultimately boosts productivity.



PRO TIP

Maintain Best Practices

Effective pipeline management can feel cumbersome at first, but with the help of a CRM and clear communication with your team, it will drive consistent revenue. By breaking the process down into smaller steps, you'll be able to maintain best practices that empower reps, better serve your prospects, and, ultimately, hit those numbers.



How to Get the Most Out of a Sales Call

You only get one first impression on a sales call. Make sure it's a good one.

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What Is a Sales Call?

At its most basic level, a sales call is a conversation between a salesperson and a prospect about the purchase of a product or service. These calls – most often conducted either in-person or via video – involve multiple parts, including initial agenda-setting by the rep, the product pitch, a demo, prospect objections and rep responses, negotiation, and outlining of next steps. Ideally, a rep closes a sales call with a verbal agreement from the prospect to make a purchase.

Sales is not about selling, but about building trust and educating.

Siva Devaki, Entrepreneur



How Do You Prepare for a Sales Call?

In a typical sales process, much of the preparation, including prospect research and qualification, occurs days or weeks before the sales call is even scheduled. The tasks explained below are specific to the call itself.

1 Set Sales Call Expectations Before the Actual Call.

Before you make the call, determine your prospect's needs and pain points. This avoids any surprises during the call itself, as you've already established alignment with product solutions and set expectations of what's to come. This is also an opportunity to tactfully ask who else needs to be involved in the decision-making process before the purchase can be finalized. Send an advance copy of the contract or a prepared quote so all decision makers can review sales details before the call.

2 Prep a Demo.

Talking about your product as a solution only goes so far. To ensure you're delivering what the prospect needs, consider presenting a video or interactive demo during the sales call.

Keep it to no more than 10 minutes and, if needed, prep the person leading the demo so they know to highlight specific features that meet the prospect's needs.





3 Create a Tailored Presentation.

In a recent Salesforce study, sales reps reported they often struggle to fully understand their prospects' needs – in part because they don't conduct adequate research or hold discovery calls. The result is a generic sales pitch that doesn't frame the product as a solution to unique prospect problems. To avoid this, make sure you know each prospect's needs inside and out. Then create a slide deck, video presentation or interactive content specifically addressing those needs, taking into account your prospect's communication and engagement preferences.

4 Determine Likely Objections and Responses.

Expect objections to the sale – even if you've done your homework and mapped out the perfect product solution for the prospect. To prepare for this inevitability, outline the sales objections your prospect is likely to have, along with responses. Use this as a reference during the sales call.



Make the sales process a cinch with Sales Cloud

Set a sales call agenda, review quotes and contracts, take notes, and automatically log prospect communication on one platform.

[Learn more about Sales Cloud](#) ➔



13 Tips for Making a Successful Sales Call

There's no magic formula for the perfect sales call. That said, you can still make sure you're addressing prospect needs and moving things closer to a sale. The tips below are a good place to start.

According to a 2021 Salesforce survey, only 32% of sales reps say they receive excellent training or coaching, including training on sales calls. This results in missed opportunities and, in some cases, botched deals.

1 Record and Review Your Call.

Each call is an opportunity to learn, improve, and boost sales. To ensure you have the insights needed to master sales calls, make sure each one is recorded on your phone or video conferencing platform (after asking for the prospect's permission). When calls are complete, review them. Find objections you might have missed or insights you could have added and share calls with your manager or colleagues for feedback.

PRO TIP

Einstein Conversation Insights

Tools like Einstein Conversation Insights can help you analyze commonly used keywords and your listen/talk ratio.

[Discover more](#) ↗

2 Start With A Friendly Greeting — But Not Too Friendly.

Many reps make the mistake of launching into their sales pitch too soon. You want to build rapport and comfort with your prospect, and that starts with a friendly greeting – maybe even chitchat. Keep the greeting to just a few minutes, then move on.

3 Make Sure Nothing Has Changed Since the Last Communication.

Business moves fast, which means change is constant. To be sure you're not wasting your carefully prepared pitch on a prospect whose needs have shifted, preface your agenda-setting with a simple question: "Has anything changed since the last time we talked?" This allows you to adjust your talking points to meet their needs in the moment or, if needed, reschedule the call so you have time to prepare a new pitch.





4 Set Call Agenda and Expectations.

After confirming that the prospect's circumstances haven't significantly changed, spell out the agenda for the call. This agenda should align with expectations set at the end of the discovery call and be as straightforward as possible. Share your sales call agenda early so the prospect knows what to expect.

Here is what a typical sales agenda might look like:

Welcome	Greet and review prospect's situation
Agenda	Outline the meeting
Review prospect needs	Confirm pain points
Product overview	Introduce product features and functions
Product solutions	Explain how your product addresses pain points
Demo	Showcase product and highlight problem-solving features
Questions	Offer additional information (as needed) and address objections
Next steps	Outline action items and a timeline for closing the deal

5 Reiterate Pain Points.

We've said it once and we'll say it again: Reiterate your prospect's pain points during the call. This accomplishes two key things. It shows that you listened and are putting their needs front and center, and it sets the stage for presenting your product solution.

6 Talk about product value, not features.

As you work your way through your sales pitch, lean heavily on language that favors value and problem-solving. How are you attempting to make your prospect's life easier or better? Be specific and, if possible, show measurable improvements.





7 Reference Your Unique Differentiator.

While you may make a compelling case for solving your prospect’s problems, competing products frequently offer similar solutions. To avoid being outshone by other companies, research your competitors in advance and articulate differentiators that clearly elevate your product above others.

8 Use Positive Language.

What you say matters, but how you say it matters more. This is especially true in sales. In fact, leaning on empathetic, value-based, and positive language is critical to earning prospects’ trust and emotional buy-in. Once these are in place, closing a sale is relatively easy. For example, instead of using terms like “payment,” which implies debt, use a word like “investment,” which implies ownership and opportunity.



9 Respond to Objections With Questions to Fully Understand Each Concern.

New sales reps often react defensively when prospects object to a sale – even when the objection is valid. While it’s good to have some responses in the bag to underscore your product’s value, the goal in objection handling is not to fire back with counterpoints.

Focus on understanding any objection. Follow up with questions and ask them where their concerns are coming from. Often, these concerns are symptoms of a bigger problem you need to understand before you can respond with anything of value.

Marcus Chan
Sales Coach and President, Venli Consulting Group

10 Actively Listen.

Sales reps are often dinged for talking too much in sales calls. The goal during these calls is to provide value and solutions for the prospect while making them feel heard. This requires more listening than talking; a 60/40 listen-talk ratio is often favored by sales experts. Focus on being genuinely interested. If you are going to talk, spend most of your time asking questions.



11 Balance Statistics With Stories.

When prospects ask about the effectiveness of your product, it's common for reps to respond with stats. These can be compelling, but they can also lead to glassy-eyed stares. As an alternative you can use stories to grab attention and secure buy-in.

Our brains are wired to understand and retain stories. A story is a journey that moves the listener, and when the listener goes on that journey, they feel different. The result is persuasion and, sometimes, action.

Jennifer Aaker, Stanford Marketing Professor

12 Don't Leave the Call Without A "Yes."

One of the biggest mistakes new reps make is leaving sales calls open-ended. Prospects frequently respond to pitches with a casual, "I'll think about it." New reps, aiming to please, agree to give them space for deliberation. Inevitably, however, prospects are caught up in other responsibilities and forget about the sale. To avoid this, close the call with a couple of direct questions/ comments: "You've highlighted X and Y as problems for your business. We've just taken a look at the product and how it can solve those problems. Do you agree it's a good solution for you? Great. It sounds like we're on the same page. To take care of your problems ASAP with the solution we've discussed, all we need to do is take care of some easy paperwork and we'll get you onboarded immediately. Sound good?"



PRO TIP

Use the Cost of Inaction to Push the Close

If a prospect waffles, make use of the "cost of inaction." Explain the cost in time, money, and labor if they wait to make a purchase decision. When they recognize the consequences of waiting, securing a "yes" to the sale becomes easier.

13 Close With Next Steps, Including a Timeline for Follow-Up.

After you receive your "yes," clearly outline what will happen after the call. This includes action items for you, the prospect, and any other decision makers or stakeholders, as well as clear deadlines for each action item. Ask for agreement to this schedule, and then follow up with an email summarizing your call. With a clearly outlined task list, closing a deal becomes simply a matter of keeping the prospect on schedule.

Talk about product value, not features



How to Close Sales Like an Absolute Pro

There's no one way to close a deal, but these tips will help you create a winning game plan.

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What We'll Cover:

- ➔ What is sales closing and why is it important?
- ➔ What are the most common sales closing techniques?
- ➔ How do you improve at sales closing?
- ➔ What are sales closing pitfalls you should avoid?

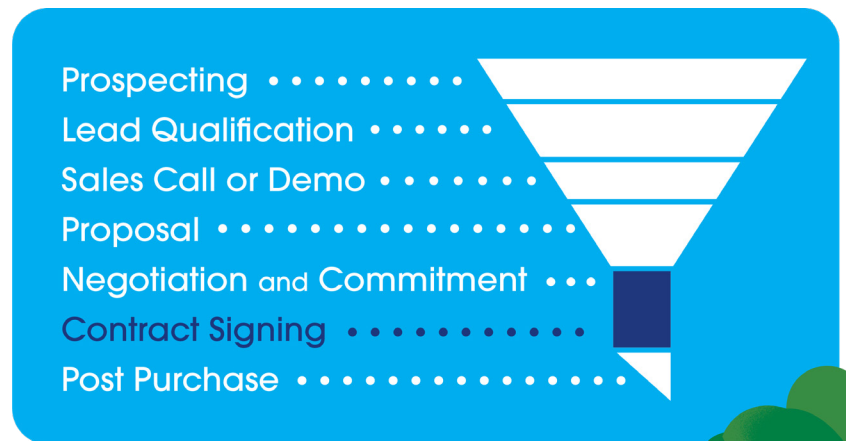


What is Sales Closing?

Sales closing is about getting a prospect to agree to a deal and sign a contract. It represents the culmination of all your efforts. You put in the time and made a strong case for why your solution can alleviate the prospect's pain points. Now that you've popped the question with a (sales) proposal, it's time to find out if this prospect is ready to commit. The make-or-break nature of sales closing can make it one of the most stressful aspects of selling, but it doesn't have to be.

Fundamentally, closing a deal should be the easiest part of a sales cycle. There are a series of key milestones you have to hit in order to be in a position to close a deal. If those key milestones are done well, closing is the easy part because the work's already been done.

Jay Camp, Strategic Account Director,
Large Enterprises, Salesforce



What Are the Most Common Sales Closing Techniques?

There's no one way to close a sale. Your approach will shift based on the prospect with whom you're engaging and what their needs are. But this curated list of tried-and-true methods provides a template of what strategies to deploy and when.

1 Assumptive Close

In the assumptive sales close, you move forward under the assumption that the prospect wants to buy and that the deal is pretty much done. Instead of asking them if they're ready to buy, you'll ask how many products they would like or when the solution could be implemented. The key here is to be assertive without being aggressive, which can ruin the rapport and scare the prospect off.

2 Puppy Dog Close

This sales close technique comes from the idea that if a pet store offered to let you "test a puppy out" and take it home for a few days, you would fall in love with it and never return it. In a puppy dog close, offer a free trial of your product with no strings attached. The hope is that the prospect finds your product so indispensable that after their little test drive, they can't bear to part with it.

3 Scale Close

This is also referred to as the gauge close. You take the prospect's temperature by simply asking them point-blank how interested they are in your product. (Ex: "On a scale of one to 10, with one being 'Let's end this conversation now' and 10 being 'Let's get this solution implemented on Monday,' how likely are you to move forward with purchasing?") The scale close does two things: It lets you know if you've been effectively communicating the value of your product and also gives you an opportunity to address any objections they might not have shared with you.

4 Scarcity Close

Also known as the now-or-never close, the scarcity sales close leverages good old-fashioned FOMO (fear of missing out) to get a prospect to buy. You sweeten the deal with a discount or an added benefit to the prospect, but only if they act now and make a purchase. This mainly works when the prospect is sincerely interested in buying, but needs a small nudge to get to yes.



5 Takeaway Close

This technique capitalizes on people's desire for things that they can't have, also known as reverse psychology. Note that your solution "might not be a good fit" for them or that their company "may not qualify for your solution like other companies have." The takeaway close is effective because you're doing the opposite of what a salesperson typically does, which is sell, so the prospect doesn't expect it. Similar to the scarcity close, this tactic only works if the prospect has already established interest in your product but hasn't pulled the trigger on buying.

6 Summary Close

Sales cycles can be long, especially for B2B selling. A prospect who's juggling conversations with different vendors about different products might not remember all the great things your solution has to offer. In a summary sales close, you review the features of the product and how it will help meet their needs. It gives the prospect one more time to really envision what your product might accomplish for them before making a decision.





I always tell people sales is not about 'selling' or convincing anybody of anything. It's about helping people solve problems or achieve goals."



John Barrows

CEO, JB Sales



How Do You Improve at Closing?

Here are a few pointers to keep top of mind when you're trying to reel in the deal.

Know the Customer.



Selling should feel like helping, because that's ultimately what you're doing. The consultative approach will always beat the transactional approach, especially in B2B selling. Use discovery calls and your own research to know the customer inside and out. What are their pain points? How does your solution address them? Are they an ideal fit for your solution? This personalized approach builds trust, and at the end of the day, successful selling is all about relationships.

Know Their Objections.

Preparation is half the battle. Your prospect will naturally have objections about why this isn't the right time for them to buy. A very common one is pricing. What's the competitive advantage of your tool that offsets the cost? Be ready to go with solid answers to whatever pushback they might have. This makes you look more knowledgeable about the prospect and the product.

Know You're Part of a Team.

Combined expertise will outweigh one person's expertise every time. When you're facing hurdles, lean on your collaborative tools like Slack to connect with your fellow reps or your sales managers in real-time so you can decide your next move as a team.

 **There will be a lot of times where you don't have the answers, and that's okay. It's important to know you have a team that will do everything in their power to help you deliver what the customer needs.** 

Kelly Myers, Account Executive, Salesforce

Know the Decision Maker.

Are you talking to the right person? If not, how do you get to the right person? So much of sales closing requires getting the correct people in the room who have the power to call shots. You'll want to suss this out earlier on in the sales process when you're qualifying leads. Don't spend too much time communicating the value of your tool to the marketing manager if the person holding the purse strings is the vice president of marketing.

Know When To Fold 'em.

Sales representatives don't close every single opportunity in their pipeline. That means a lot of the prospects that come your way may not become customers. It's also possible a small percentage of leads could bring in a lot of your revenue, which means you don't have to pursue those unlikely to close. Knowing when to move on is critical. Don't dwell on prospects that have shown no interest in closing. You'll lose sight of more promising opportunities.



Every deal, whether it's a win or loss, has something you can learn from. It's an opportunity to reflect on how you can evolve both in process and strategy."



Kelly Myers

Account Executive, Salesforce



What Sales Closing Mistakes Should You Avoid?

Experience can be the best teacher when it comes to knowing what not to do. Here are common pitfalls that the smartest salespeople have learned to overcome.

Going in for the hard close.

Pressure selling is out, empathy selling is in. When you come out early with an ask for the sale and then keep aggressively asking before you've even truly established your product's value, it shows little consideration for the buyer. It makes it appear as though you're speeding through the sale to meet your quota, and it's off-putting.



Not asking for the sale.

An important thing to remember when closing? Ask for the sale. Inertia can be a difficult thing to overcome when working with prospects. Many waffle when faced with multiple vendors and put off making a final purchase decision. If you tell them to “take some time to think about it and circle back,” you may never hear from that person again. After you've effectively communicated why your product is a fit and they've reciprocated interest, sometimes it's powerful to simply ask if they're ready to buy. If they balk, that's your cue to ask more questions about their needs.

Only closing at the end.

How do you know when it's the right time to close? How do you avoid closing too early? Too late? This is a bit of a trick question. There is no singular moment when you go in for the close because, if you're wise, sales closing is something that happens throughout the sales process. The prospect signing on the dotted line is more of a natural conclusion, not an event.



I would say that curiosity is key. You need to always be asking questions. The risk of a conversation going nowhere is strong if you aren't listening."



Francois Carle

Strategic account executive, Schneider Electric





PRO TIP

Always Be Closing

This used to be a common saying in sales.
That's shifted to

Always Be Connecting

You should always be studying your prospects and adapting your approach to match their expectations and their needs. Similar to chess, your first moves often determine your final ones.

When the rest of the sales process has been strategic and focused, sales closing becomes less of a conquest and more of a collaboration between you and the buyer.



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