

7 Ways to Transform Your Sales Process for Consistent Excellence

The truly great sales
cycle is the one you
can repeat.

Being “great” at sales means having as truly great sales cycle that is as repeatable as it is effective. It’s the scenario every seller from chief revenue officer to account executive can appreciate and value: a strategic, thoughtful, and well-executed sales process that leads to a well-deserved and profitable win.

But savvy sales leaders know that you can never rest on your laurels. In a “what have you done for me lately” world, what sets winners apart over the long-term is the ability to consistently deliver sales wins. That consistency comes from following guidance on what is needed to achieve with the customer, in-line with the customer’s own buying process.

When everyone continually performs the same winning behaviors, the sales team can achieve remarkable sales velocity with consistency. A winning sales process is the sequence of best practices from your top performers (or learned from external observation) that ensures your salespeople repeat the actions that have the greatest likelihood of success—and that success can be shared across business units, divisions, districts, regions, territories, and teams.

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However, driving a consistent sales process that matches a customer’s buying process is a difficult challenge, and deviations are a constant source of frustration.

Sales leaders can’t be everywhere, different sales managers inevitably introduce variability, and customers don’t always follow your playbook.

Beyond the distinct stages in Salesforce, it can be difficult to reinforce all the required behaviors and ensure all reps are executing the preferred process and steps in the same way, every day. That’s why every sales manager needs visibility into sales process activities of the team and the absolute and relative behavior and performance of each team member.

Sometimes, sales organizations mistakenly build sales processes that are about activities, whereas we believe it should be about enabling sellers with the right series of interim goals or outcomes to achieve.

The Solution?

Design an explicit sales process aligned to the customer and bring it to life in Salesforce. The process should provide insights and coaching to front-line managers and sales leaders to enable consistent improvement and predictable revenue growth.

On the following pages, we share how you can achieve consistent sales wins through repeatable processes.

7 ways to transform your sales process

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Recognize

it's a customer-directed sales process.

02

Define

or refine your current sales process.



03

Tailor

the process to the opportunity.

04

Align

customer references, sales tools, and assets by process stage.

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Configure

process, benchmarks, and analytics in Salesforce.



06

Use process

to check forecast accuracy.

07

Manage

based on insights from the data.



01 Recognize it's a customer-directed sales process

It's a truth that's easy to overlook: in great sales processes, it's not about what you're doing, it's about what the customer is doing—and why.

Some purchases are guided by a single decision maker – although rarely in enterprise sales. More often they are governed by a large buying committee. Some issue RFPs, others invite recognized suppliers to discuss issues. Most executives and project leaders learn by networking with peers. In fact, studies have found that the most trusted resource is often a peer.

But there's a major vulnerability for many organizations as they develop and train their teams to execute the optimal sales process.

It's the customer who knows every step they want to take in the buying cycle.

They have:

- **A business problem to solve**
- **Alternatives to consider**
- **Decision criteria they deem critical**
- **A procurement process that is unlikely to be avoided**

In short, they have a detailed project plan, with hurdles and obstacles you have to navigate. So, it only makes sense to ensure your selling activities fully align with the customer's buying activities.

Unless and until you put the customer at the center and visualize the journey the customer wants to take, you won't be with them when they reach the destination.

Sales processes must reflect the buyer's behavior and actions to help the team be truly effective. **Today's sales professionals don't merely sell—they must help the customer buy.**

TIP: Once you understand the customer's process, plan, and approach, you can align your sales cycle with their buying cycle, and develop your strategy for success.

02 Define (or refine) your sales process

To make sure everyone's on the same page, it's essential to ensure that you define, use, and enforce standard definitions in your deal types, sales stages, and specific outcomes at each stage.

- **What's a qualified opportunity?**
- **What's required to move the opportunity to "vendor selected"?**

Many organizations know their methodology and process thoroughly but need to make it actionable in Salesforce.

Those definitions should reflect your preferred methodology and your sales process (which reflects your methodology). It could be Account Based Selling, MEDDIC, Target Account Selling (TAS), Customer Centric Selling, or a custom framework that reflects your company's business model and sales methodology. These definitions help ensure that salespeople have a shared go-to glossary that improves collaboration.

Many organizations know their methodology and process thoroughly but need to make it actionable in Salesforce. This requires more than just changing labels on the tabs—you need the process, stages, and assets to align and mesh to guide the entire revenue team.



03 Tailor the process to the opportunity

What makes one sales process more repeatable than another? In many instances, it's the simplicity of the process.

You want to structure your sales process to require the fewest steps possible, and eliminate any unnecessary work for your reps. The smaller the deal, the fewer process steps you should have. For larger deals, you need more structure, and leveraging your Salesforce CRM platform for that purpose will be beneficial.

That's because one sales process does not fit all. A very large deal in a strategic account demands a complex and sophisticated set of "plays" to win the deal. In other cases, smaller transactional deals might be quick and require a smaller subset of the process steps from qualification to close.

What's more, not all sales cycles travel at the same speed. Inside sales, renewals, large-company pursuits, complex solution sales, and simple product sales—they each need a well-designed process using a common language for the team—by intelligently presenting the right steps, and just the right steps, for each transaction type.

Many organizations struggle with process because the "standard" process is too much or too little for different types of deals. This leads reps to skip crucial steps or work around the process to "just get the deal done." What happens instead is they fail to get the maximum value from the opportunity. Even worse, they may wind up losing the deal altogether.

Not following each of the crucial steps sub-optimizes the process, the rep, and the company. You can't measure process effectiveness, much less refine and improve if reps aren't following it.

It is vital, therefore, to find a supplier that helps instrument processes in Salesforce, only exposing the number of process steps required when a new opportunity arises.

For example, a small add-on deal may only require a six-step process from open opportunity to close in Salesforce, while a new enterprise opportunity in a target account might initiate a 20-step process for the sales rep.

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04 Align customer references, sales tools, and assets by milestone

In reality, a B2B sale isn't a single event. It's a collection of micro-sales events, each crafted to move closer to the eventual goal: closing the deal.

Unfortunately, salespeople frequently face a myriad of sales tools and can get overwhelmed by a torrent of information. They're busy and often don't know which sales tool asset they need, where to find it, or how to use it for the specific task or point in the sales cycle.

The answer? Connect the tools to the process.

Link sales tools and assets to the specific step in your sales process, so that they become a natural part of the structured, repeatable sales process. This enables sellers to easily and quickly self-serve and get what they need in context of the process and at the right stage to advance the sale. Not only will that increase their win rate and drive sales velocity, it will also drive higher usage of sales tools and assets and produce the right outcomes at the right time—consistently.



05 Configure process, benchmarks, and analytics in Salesforce

The only true way to confirm successful progress in achieving a repeatable sales process is through benchmarking, which can deliver considerable advantages as you improve your sales organization's performance.

Your sales process must capture the benefits of wins, learn from losses, and uncover insights that help you to accelerate sales velocity. As you implement a sales process, ensure you have embedded the ability to progress through these stages of evolution for your sales team.

For example, use your analytics to measure wins, losses and early qualified-outs. Use this to see what next steps in the process are really making a difference and what could be removed. Work to simplify, hone and pare down to what really matters.

After formulating a comprehensive assessment of the current state, you're prepared to develop a foundation for sales productivity improvements that are truly transformative. You know where you

are starting from, and you see what you have to change. Now you can easily identify and prioritize opportunities for improvement.

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Continuous improvement is the third major advantage you should seek as you benchmark the team. The more sales cycles you go through, the smarter your process gets. Don't rely on sales processes that don't support you in gaining this insight.

06 Use process to check forecast accuracy

For most companies, the accuracy of sales forecasts leaves a lot to be desired. But structured processes and best practices for forecasting can have a dramatic impact.

Salespeople spend about 2.5 hours each week on sales forecasting, and for the most part, this is probably a wasted exercise.

Based on studies, companies that fail to define, refine, and execute a consistent sales process suffer from inaccurate sales forecasts 71 percent of the time. When success or failure is usually measured in margins far less than 25 percent, forecasts like that are virtually worthless.

The good news: There can be a very strong causal connection between the sales process and forecast accuracy.

Front line sales leaders need tools, process and methodology to effectively coach their teams.

In fact, studies have found that companies that do define and execute their sales process reduced the level of forecast inaccuracy to 33 percent. That is a 200 percent increase in sales forecast accuracy.

To maximize the impact of your sales process on the accuracy of your sales forecast, consider this crucial strategy: Does the sales process incorporate intelligence to objectively monitor the close date?

If you build best practices, and your sales process can learn the rhythm of your business, it should be smart enough to help predict the close date of the opportunity, and pinpoint when the deal will close based on past behaviors of successful sales cycles.

It's also important to understand if the sales process provides insights into deal risk to help you answer key questions:

- **What's in the forecast?**
- **Are any salespeople counting on unusually large deals to make the quarter?**
- **Are all deals being worked?**
- **What's closed?**
- **What's projected?**
- **Which deals are moving quickly, and where are the opportunities that are stalled?**

Visibility into the sales pipeline, consistent sales process and your approach are critical to determining where to focus for maximum impact.

Front line sales leaders need tools, process and methodology to effectively coach their teams, which drives disciplined sales cycles and consistent performance improvement. In this manner, sales managers can review forecasts in collaboration with the seller directly in the tool, giving valuable hours back to the sales rep, improve the accuracy of the forecast for each opportunity, and spotlight what will help them understand what to do to make or exceed quota.

07 Manage from the data

The frontline sales manager has one of the hardest jobs in the business. Unless they have all the tools and data needed to easily manage the business, the performance of the entire sales organization can suffer.

If the sales organization adopts a sales process to increase velocity, it must provide easy-to-use tools to enable the sales manager to monitor how the team applies the process, and the resulting impact on revenue.

With a better process, you earn more sales wins, improve forecast accuracy, and achieve a higher level of sales consistency through ongoing data-driven improvements.

The right sales process provides the sales manager with a view across the entire team's work. What critical deals are being worked on? Where is each deal? Where should attention be focused? These are all answers that should be informed by a sales manager's view of the operation of their team's sales process.

It's equally important that your sales process is quick and easy to use. Your processes should be designed with the seller in mind.

Remember, the sales manager is the critical link. If your sales process increases their visibility into the sales team, you will strengthen that link and improve your return.

Conclusion

Sales leaders know that sales process is the key to unlocking consistent and repeatable sales cycles that meet or beat targets and quotas—a non-negotiable requirement for company success.

That's why it's so crucial to get everyone conforming to a standard sales process. A sales process guided by methodology, that enables the team to understand the customer's needs and wants and align sales campaigns to reflect and support how the customer buys. Altify's native solutions bring your sales process to life in Salesforce. Our solutions dynamically configure Salesforce to apply just the right amount of process based on opportunity size and type. We help you unleash the strategies, tools, and assets at each step of the process to enable sellers to advance deals and meet their goals.

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We are Altify.

Altify is the Account Planning AI Cloud helping sales teams grow revenue by planning smarter.

Altify was founded on a core belief: **strategic B2B selling puts the customer at the center**. We know sales success isn't just about selling something—it's about **creating mutual value**, which demands a solid plan.

Our mission is to shape the next generation of sales leaders. We equip revenue teams with **proven methodology, best practices, and a structured sales process**, fostering a customer-first mindset to strengthen relationships and win more opportunities.

Altify is not just software, but rather full-service sales transformation, powered by software. Our expert team helps sales organizations build and scale successful, tailored methodology-backed programs, with wholistic support from **sales strategy and training to technical implementation**. We ensure long-term customer value, proudly helping the world's best sales teams deliver unparalleled results.

See how Altify can transform your revenue operations at altify.com