

# IT NATION™

hosted by  CONNECTWISE®



# Design Your Sales Process | Set Sales & Service up for Success

Presented by:

Nathan Austin – Co-Founder & VP of Business Development

Mytech Partners

[Linkedin.com/in/NathanAustin](https://www.linkedin.com/in/NathanAustin)

IT NATION™

# Key Takeaways from This Session:

- Sales Milestones that will Help Service Forecast
  - When You Should Not Charge for your Evaluation
- Creating Clarity with Sales Stage Definitions

# Session Overview

Purpose of this session Help You Build or Refine YOUR Sales Process

Identify Common Problems Associated with executing a Sales Process

Discuss Critical Components to Solve Sales Process Problems

Recommended Next Steps & Q&A

Quick Check-in with a Show of Hands:

**How many of you feel that you  
have a Well Defined AND Executed  
Sales Process?**

# Common Sales Process Problems

Stay on top of  
Client Projects

Lose Track of  
Prospects

Lack of  
Accuracy

Inability to  
Forecast  
Service Impacts

Hold Account  
Managers  
Accountable

Goal Tracking

# Mytech's Sales Stages

- 1. Opportunity Identified**
- 2. Evaluation & Technical Discovery**
- 3. Qualification of Solution & Budget**
- 4. Proposal Generation & Presentation**
- 5. Negotiation**
- 6. Commitment**

# Sales Stages Pro Tip #1:

Define what criteria must be present to move from one stage to the next!

This will help your team have clarity and execute consistently.



# Key Milestone in New Client Acquisition

**When You have Qualified the Prospect**

**What Stage is this for YOU?**

**AND**

**When the Prospect is Asking for your Proposal**

**For Mytech this is stage 2, when the Prospect Approves our Evaluation Proposal\***

# Why we Strive for a \$0.00 Evaluation

## Qualified Prospects Receive a \$0.00 Proposal

- Budgetary Alignment
- Our Solutions solve Prospect Problems
- The right people are in the room – at least one executive
- Prospect has come to our office for a tour
- Agree to give us a timely decision

# Example Managed Services Pipeline

## ConnectWise Sales Overview vs. Dashboard

# Key Milestone with Existing Client Projects

**When there is alignment of the Solution & Budget.**

**For Mytech this is stage 3**

**Do Not Pass Go without alignment**

**What Stage is this for YOU?**

**AND a commitment to approve within two or three weeks.**

# Example Professional Services Pipeline: ConnectWise Sales Overview vs. Dashboard

# Mytech's Example Process & Definitions

# Next Steps for Sales Process Development



Take YOUR Next  
Step



Keep it Simple



Write Down Stage  
Definitions



Add YOUR Stages to  
ConnectWise  
Opportunities



Start Using Stages in  
your Sales Process

# Sales Stages Pro Tip #2:

Improvement of Accuracy & Consistency  
Comes from...

- Weekly One-on-One Review
- Use ConnectWise Get the **Red Out**
- First Item on One-on-One Agenda



# Call to Action!

1. For access to Supporting Documentation for this or my other two sessions go here:

[Mytech.com/ITNConnect](https://mytech.com/ITNConnect)

2. Consider Joining the Evolve Sales Peer Group

+

*Don't forget to fill out your*

# SESSION SURVEY

+

+

Thank you for Attending!

Design Your Sales Process |  
Set Sales & Service up for Success

Presented by:

Nathan Austin – Co-Founder & VP of Business Development

Mytech Partners

[Linkedin.com/in/NathanAustin](https://www.linkedin.com/in/NathanAustin)

IT NATION™