Sales Checklist

A step-by-step sales process checklist covering prospecting, qualifying, discovery, demo, closing and follow-up.

Prospect and Research

- ○ Define your ideal customer profile and target account list for the period.
- ○ Research each account's industry, size, recent news and likely pain points.
  Two minutes of context lifts reply rates more than volume.
- ○ Identify the likely decision-maker and at least one potential champion.
- ○ Verify contact details and confirm the prospect is not already an open opportunity.
- ○ Choose an outreach channel and personalize the first message to the account.
- ○ Log every new prospect and touchpoint in the CRM before moving on.

Qualify the Opportunity

- ○ Confirm the prospect has a real, urgent problem your product solves.
- ○ Establish budget range and how purchases get approved.
  Use a framework like BANT or MEDDIC for consistency.
- ○ Map the buying committee and identify who signs off.
- ○ Determine the timeline and any compelling event driving a decision.
- ○ Disqualify poor-fit deals early so you protect your pipeline quality.
- ○ Set and document clear next steps with the prospect's agreement.

Discovery and Needs Analysis

- ○ Send an agenda before the discovery call so both sides come prepared.
- ○ Ask open questions to uncover goals, current process and frustrations.
- ○ Quantify the cost of the problem and the value of solving it.
- ○ Identify success criteria the buyer will use to judge the solution.
- ○ Confirm decision process, stakeholders and competing priorities.
- ○ Summarize what you heard and gain agreement before proposing a solution.

Demo and Proposal

- ○ Tailor the demo to the buyer's specific use case and success criteria.
- ○ Show outcomes and value first, then features that support them.
- ○ Invite the full buying committee to the demo where possible.
- ○ Send a written proposal with clear scope, pricing and timeline.
- ○ Include a business case or ROI summary tied to the buyer's numbers.
  Connect every line item back to a goal they named in discovery.
- ○ Confirm the proposal answers every requirement before asking for a decision.

Handle Objections and Negotiate

- ○ List likely objections and prepare evidence-based responses in advance.
- ○ Acknowledge each concern, then address it with proof or a reference.
- ○ Surface and resolve pricing questions directly rather than discounting first.
- ○ Negotiate on value and terms, protecting margin where you can.
- ○ Get verbal agreement on scope and price before drafting the contract.

Close the Deal

- [ ] Ask clearly for the business once the buyer's criteria are met.
- [ ] Send the contract for signature with no surprises versus the proposal.
- [ ] Confirm signing authority and walk the buyer through the approval steps.
- [ ] Agree start date, kickoff owner and how onboarding will begin.
- [ ] Mark the opportunity won in the CRM and record close reasons.
  Accurate close notes sharpen future forecasting.

Follow Up and Hand Off

- [ ] Thank the buyer and set expectations for the next steps.
- [ ] Hand off to onboarding or customer success with full deal context.
- [ ] Schedule a post-sale check-in to confirm early value and satisfaction.
- [ ] Ask for a referral or testimonial once the customer sees results.
- [ ] Review the deal in your own pipeline retro to capture lessons learned.