



# Sales Consultation Process

This is a starter template for a sales consultation and followup process. It's a static version of a more dynamic process that can be built and used in ProcessKit.

Edit this process and make it your own, and also put it to use in your repeatable projects:

[Sign up for a free trial of ProcessKit.](#)

Learn how to make your business more predictable with our free video course:

[Process Automation for Service Companies](#)

## 1 Receive the consultation request

A new consultation request comes in via the consultation request form on our website. Once this has been received, you create this project and check off this task.

Save the prospect's details into those fields on this project:

- Prospect name
- Company name
- Website
- Email address
- Phone number
- The message they sent with their consultation request

- Referral source

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**Editor's note:** You can use *ProcessKit's Zapier integration* to have your website form automatically start this project and then automatically check off this task.

## 2 Confirm consultation booking

Your consultation request form should lead the prospect to your calendar booking software to schedule and book their consultation call. (If you're not using calendar booking software, then you can send an email to the client to arrange this scheduling)

Once the call has been booked, check off this task.

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**Editor's note:** You can use *ProcessKit's Zapier integration* to have this task checked off automatically at the time the consultation has been booked.

You can also use Zapier to update the "consultation call" task's start date to be the date of the booked appointment from Calendly.

## 3 Send pre-consultation info to the prospect

You want to provide to the prospect as much education about your product or service *before* they get on the consultation call with you.

Send the prospect our information pack or demo video so that they can learn the basics before they speak to you.

You can have this information automatically sent via ProcessKit, via your email

marketing software. Or for a more personalized approach, you can send it manually.

#### **4 Research the prospect and their company**

Before you have the consultation call, you must find out all that you can about the prospect and their company.

Visit their website and get an understanding of what they do and who they serve.

Find this person's profile shown their website About page to see what their job title is. Look them up on social media (Twitter, LinkedIn) to find out more about them.

#### **5 Have the consultation call**

At the call time, join the video call or call the prospect's phone number.

Guide the conversation through these topics:

- Greetings and building rapport
- Ask them about what's happening in their business this year
- Ask them what led them to reach out for this consultation
- Ask about which solution(s) they've tried or are currently using
- Ask how our service would be a win for them
- Q&A about our service
- Ask for the sale / ask what any potential objections are

Jot down your notes as you go and save them in this project's activity.

## 6 Record your call notes

Post your notes from what you learned about the prospect during the consultation call into ProcessKit. You can post them as a comment on this task, which will also display in the Activity history on this project.

## 7 Immediate email follow up

Within an hour of finishing the consultation call, send an email to follow up and reiterate next steps.

You can use this template email:

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Hi \_\_PROSPECT\_NAME\_\_,

It was great to connect with you today about \_\_COMPANY\_\_. My team and I would love the opportunity to work with you on \_\_\_SERVICE\_\_\_.

I will be back in touch shortly with a detailed proposal for the solution we discussed.

At anytime, if you have any questions, just let me know. I'm here to help!

Talk soon,

\_\_\_YOUR\_NAME\_\_\_

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**Editor's note:** You may want to use ProcessKit's email template feature to automatically prepare and (optionally) automatically send the above email template.

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## Prepare the proposal

Now that you have an understanding of what the service and solution that this prospect needs, you can go ahead and prepare the proposal document.

Use whichever proposal template you've used for similar projects to this one.

Include:

- Needs assessment
- Goals for the solution
- Scope of work
- Price and options
- Signature line

Once prepared, save the link pointing to the proposal in the proposal field on this project, for easy access later.

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## Send the proposal to the prospect

You can use this email template when sending the proposal:

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Hi \_\_\_PROSPECT\_NAME\_\_\_,

I have prepared this proposal based on everything you and I discussed a few days ago. It includes the scope of work and cost options.

You can view the proposal here:

<https://examplelink.com/proposal-abc>

If you have any questions or need us to make any adjustments, just let me know.

Talk soon,

\_\_\_YOUR\_NAME\_\_\_

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**Editor's note:** You might want to use ProcessKit's email template feature to automatically prepare and (optionally) automatically send the above email to the client. You might also use the ProcessKit Zapier integration to dynamically insert the link to your proposal document.

## 10 Follow up 1

One week after the proposal was sent, assuming the prospect has not purchased or replied in the past few days, then send a follow up email.

You can use this template:

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Hi \_\_PROSPECT\_NAME\_\_,

I'm following up on the proposal for \_\_COMPANY\_\_ that I sent to you last week.

Do you have any questions about the solution or next steps?

To get started, simply reply to this email or follow the prompts included in the proposal link I sent. Here's that link again:

<https://examplelink.com/proposal-abc>

Talk soon,

\_\_\_YOUR\_NAME\_\_\_

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**Editor's note:** You may want to use ProcessKit's email template feature to

*automatically prepare and (optionally) automatically send the above email template.*

## 11 Follow up 2

One week after the previous follow up message was sent, assuming the prospect has not purchased or replied in the past few days, then send a follow up email.

You can use this template:

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Hi \_\_PROSPECT\_NAME\_\_,

I'm checking in regarding what you and I discussed a few weeks ago—  
\_\_\_SOLUTION\_\_ for \_\_\_COMPANY\_\_\_.

My team and I are ready to kick things off whenever you are. Do you have any questions about next steps?

To get started, simply reply to this email or follow the prompts included in the proposal link I sent. Here's that link again:

<https://examplelink.com/proposal-abc>

Talk soon,

\_\_\_YOUR\_NAME\_\_\_

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**Editor's note:** *You may want to use ProcessKit's email template feature to automatically prepare and (optionally) automatically send the above email template.*

## 12 Final follow up

Two weeks after the previous follow up message was sent, assuming the prospect has not purchased or replied in the past few days, then send a follow up email.

You can use this template:

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Hi \_\_PROSPECT\_NAME\_\_,

I thought I'd check in one last time about \_\_\_SOLUTION\_\_\_ for \_\_\_COMPANY\_\_\_.  
Is this still a priority for you?

I'd be happy to have another call to discuss. Or if you'd like to review the proposal again, here's that link:

<https://examplelink.com/proposal-abc>

Thanks,

\_\_\_YOUR\_NAME\_\_\_

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**Editor's note:** You may want to use ProcessKit's email template feature to automatically prepare and (optionally) automatically send the above email template.

## **13** Prepare the contract

Assuming the prospect has accepted the proposal and indicated they are ready to buy your service, then prepare the contract.

Use your service contract template and insert the prospect's details (name, address, title, etc.) into the appropriate spaces.

Double check that all details shown in the contract are correct.



Once prepared, save the link to this contract in the Contract field on this project, for easy access later.

## 14 Send the contract to prospect for signing

Once the contract has been carefully double-checked, you can send it off to the client.

Use this email template:

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Hi \_\_PROSPECT\_NAME\_\_,

We're excited to get started! The next step is to complete this contract and submit payment.

Please review and e-sign at your earliest convenience:

<https://examplelink.com/contract-abc>

Thanks!

\_\_\_YOUR\_NAME\_\_\_

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**Editor's note:** You may want to use ProcessKit's email template feature to automatically prepare and (optionally) automatically send the above email template.

## 15 Receive signed contract

This task is here to mark whether you've received the signed contract back from the prospect. Once you have, you can check this task off.

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**Editor's note:** *If you're using a document signing software, perhaps you can use ProcessKit's Zapier integration to automatically check this task off once the contract has been signed.*

## 16 Confirm payment received

This task is here to mark whether you've received payment from the prospect. Once you have, you can check this task off.

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**Editor's note:** *You might want to use ProcessKit's Zapier integration to automatically check this task off once payment is received.*

## 17 Begin new customer onboarding process

Now that this prospect has converted to a new customer, you can kick off their new customer onboarding process.

In ProcessKit, use our new customer onboarding process and our customer onboarding project type to run that onboarding project.

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**Editor's note:** *You can use ProcessKit's Zapier integration to automatically start the new customer onboarding project (with it's associated process automatically included). Soon, you can do this automation from within ProcessKit as well.*

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