MODULE 3 · SESSION 1

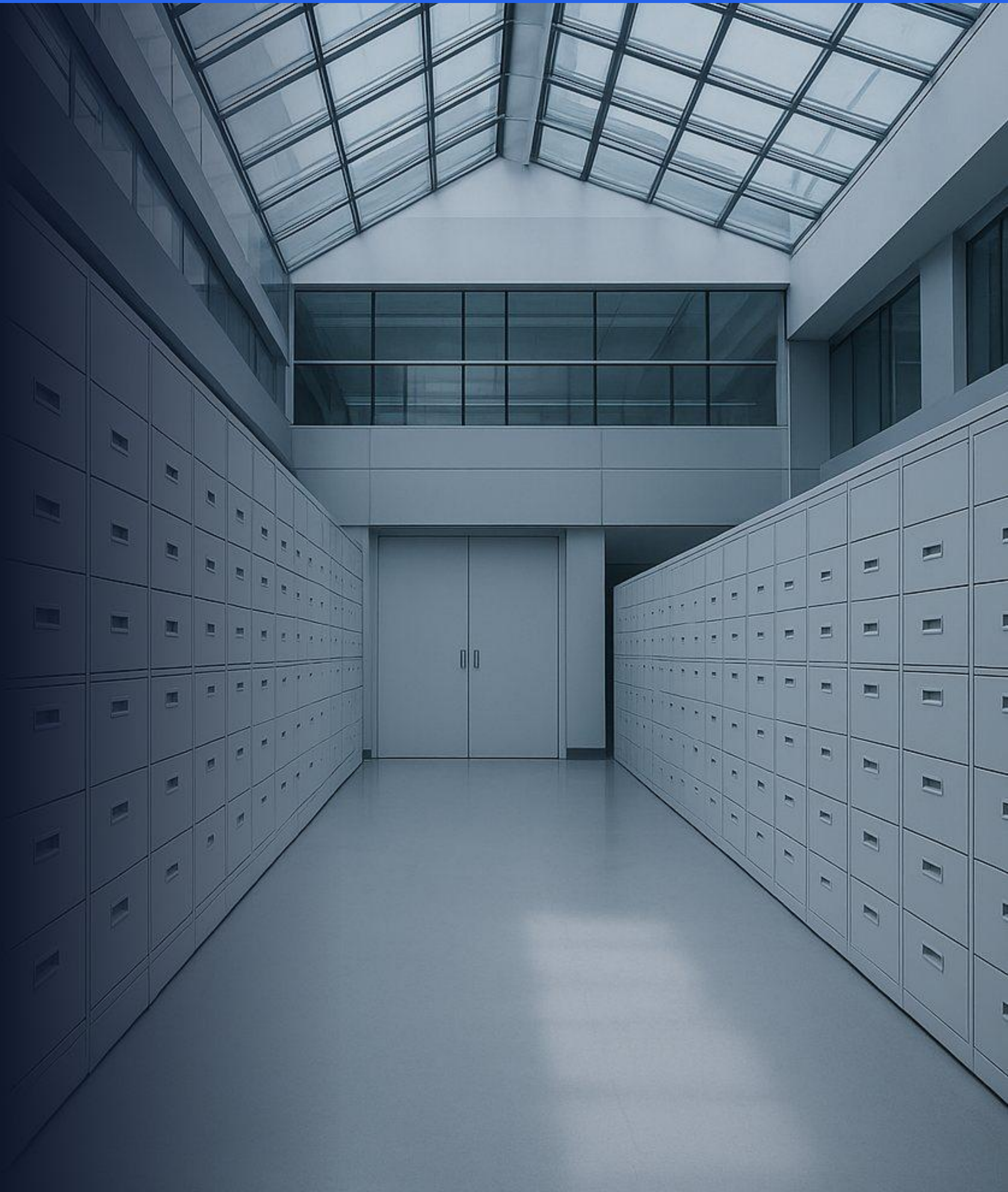
Design a Repeatable Sales Process

How to turn selling from individual skill into a defined sequence with owners, entry criteria and exit conditions.

Theory session

Beginner

Running case: ClinicFlow



ORIENTATION

Where this session sits

Module 2 produced a measurable product; Module 3 builds the motion that sells it

MODULE 1	MODULE 2	MODULE 3
Product Build and Validation	MVP Economics and Measurement	**Sales Launch and Operations**

SESSIONS IN THIS MODULE

3.1 **Design a Repeatable Sales Process** — YOU ARE HERE
Stages, entry criteria, owners and exit conditions

3.2 Practice Conversations Across Buying Moments
Discovery, demonstration, objections and commitment

3.3 Launch Through Channels, Delivery, and Support
Activating a channel and running the operation behind it

SESSION OUTCOMES

What this session explains

Making a sale repeatable by someone other than the founder

01 **A process is stages with criteria**

Not a list of activities — a sequence with defined entry and exit conditions.

02 **Qualification is a decision to spend time**

The most valuable output of early stages is often a disqualification.

03 **Map the buyer, not only the seller**

A pipeline that ignores how the customer actually decides will stall in the middle.

04 **Codify what works**

Tacit expertise becomes repeatable only when it is written down and owned.

DEFINITION

What a sales process is

A shared definition of where a deal is and what happens next

WORKING DEFINITION

A sales process is an ordered set of stages, each with a defined entry condition, a named owner, and an exit condition that can be verified by someone who was not in the room.

1

Stages, not activities

“Sent a proposal” is an activity. “Buyer has confirmed budget and timeline” is a stage — it describes their state, not your effort.

2

Verifiable exits

If two people would disagree about whether a deal has moved on, the criterion is not written tightly enough.

3

One owner per stage

Deals stall at handovers. Naming who is responsible at each point is most of what prevents it.

Adamson, B. & Dixon, M. (2011). The Challenger Sale. New York: Portfolio.

Five stages that fit most first products

Fewer stages than this hides the problem; more creates administration

THE PIPELINE

1. Qualify: is this worth our time?
2. Discover: what problem, whose budget?
3. Demonstrate: show it against their situation
4. Propose: terms, scope, and price
5. Close: decision and first delivery

THE STAGE TEAMS SKIP

The stage most often missing is the first. Without an explicit qualification gate, every enquiry consumes the same effort regardless of whether it could ever close.

CONCEPT 2 · CRITERIA

What each stage needs written down

Four fields per stage — enough to be useful, few enough to maintain

Stage	Entry condition	Exit condition	Owner
Qualify	An enquiry or outbound contact exists.	Confirmed: right kind of organisation, plausible need, reachable decision-maker.	Whoever took the enquiry
Discover	Qualification passed.	The problem, its current cost and the decision process are documented.	Salesperson
Demonstrate	Discovery notes exist and are specific.	Buyer has seen the product against their own situation and named a next step.	Salesperson + product
Propose	Scope and success measure agreed verbally.	Written proposal delivered to a named decision-maker.	Salesperson
Close	Proposal acknowledged.	Signed, or explicitly declined with a recorded reason.	Founder or sales lead

THE EXIT EVERYONE FORGETS

“Explicitly declined with a reason” matters as much as signed. A pipeline full of deals nobody said no to is not a pipeline.

Two ways to decide who is worth your time

Both are checklists; they differ in what they treat as the risk

BANT

Can they buy?

WHAT IT CHECKS

Budget, Authority, Need, Timeline.

STRENGTH

Fast, easy to teach, and it filters out the clearly impossible early.

WEAKNESS

For a new product there is often no budget line yet — which does not mean there is no deal.

MEDDIC

Will this actually close?

WHAT IT CHECKS

Metrics, Economic buyer, Decision criteria, Decision process, Identify pain, Champion.

STRENGTH

Forces you to learn how the organisation decides, not just whether it wants to.

WEAKNESS

Heavier. Overkill for small, fast transactions.

WHAT MATTERS MOST EARLY

For a first product, the two questions worth answering early are: is there a real, measured pain, and is there someone inside who will argue for you when you are not there?

Your stages and their decision

Deals stall where the two maps disagree

SELLER'S PIPELINE

What you are doing

ORGANISED AROUND

Your activities and your forecast.

WHAT IT TRACKS

Where the deal sits in your sequence.

BLIND SPOT

Everything happening inside the buying organisation while you wait.

BUYER'S JOURNEY

What they are doing

ORGANISED AROUND

Recognising a problem, exploring options, building internal agreement, justifying spend.

WHAT IT TRACKS

Their progress toward a decision they are willing to defend internally.

WHY IT MATTERS

Most delay is internal consensus-building, not doubt about your product.

THE PRACTICAL FIX

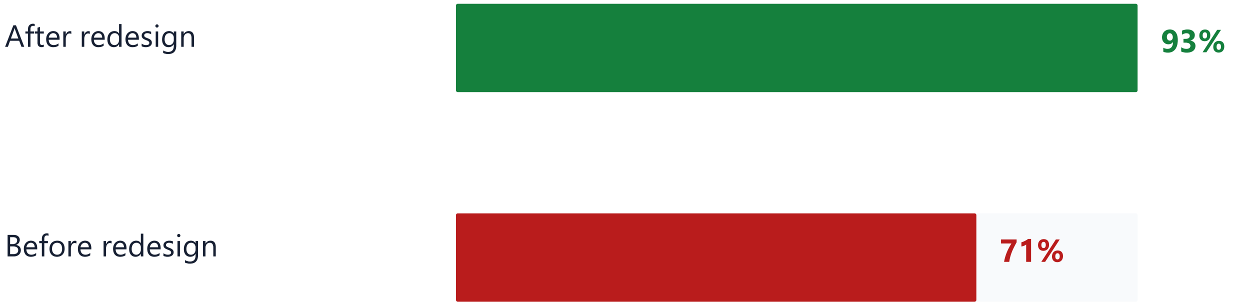
A mutual action plan — a short shared document listing the remaining steps, owners and dates on both sides — is the cheapest way to make the two maps agree.

Adamson, B., Dixon, M. & Toman, N. (2012). The end of solution sales. Harvard Business Review, 90(7).

Pipeline arithmetic

Utilisation is the same idea as conversion: capacity that exists and is not used

REPORTED SCHEDULE UTILISATION, BEFORE AND AFTER CODIFYING THE RULES



Capacity was already there. The redesign converted more of it, and saved about 3.2 scheduler hours a day.

THE PARALLEL

A pipeline is capacity

Every stage has a conversion rate. Improving the worst one is usually cheaper than adding more leads.

WHERE TO LOOK FIRST

The biggest drop

Find the stage with the steepest fall-off. That is where the process, not the market, is failing.

FORECASTING

Rate × value × time

Historic stage conversion applied to current pipeline gives a forecast you can defend.

Turning what works into something teachable

The central move in the case, and the hardest one to do honestly

WORKING DEFINITION

Codification is writing down the rules your best performer already applies without noticing — so that someone else can apply them, and so that the rule itself can be questioned.

1

Observe, do not interview

Ask a good salesperson what they do and you get a theory. Watch them and you get the actual rule.

2

Write the exception too

“Always confirm budget — except when the champion has discretionary spend.” The exception is where the expertise lives.

3

Keep the person in the loop

The Texas group codified the rules and kept the schedulers. Automation handled the repeatable part; judgement stayed human.

Nonaka, I. (1994). A dynamic theory of organizational knowledge creation. Organization Science, 5(1), 14–37.

What to automate, and what not to

The case is explicit: rules were codified, staff were retained

AUTOMATE

High volume, low judgement, clear rule. Reminders, routing, follow-up sequences, backfill outreach.

ASSIST

The system prepares and suggests; a person decides. Prioritised lists, drafted messages, flagged risks.

KEEP HUMAN

Judgement, negotiation, exceptions, and any conversation where trust is the product.

WHAT AUTOMATION BOUGHT IN THE CASE

Change	Result
Rules codified into the workflow	Utilisation 71% → 93%; about 3.2 scheduler hours saved per day.
Automated outreach on cancellations	Same-day backfill rate of 87%.
Self-scheduling made available	41% of new-patient bookings, from zero.

What belongs in a sales playbook

Short enough to be read, specific enough to be used

1

Who we sell to, and who we decline

The qualification rule, with named disqualifiers. The exclusions do more work than the inclusions.

2

The questions we always ask

Five or six discovery questions, in the words that actually get answers — not the ones that sound professional.

3

The objections we always get

Each with the response that has worked, and the evidence that supports it.

A playbook that cannot be read in twenty minutes will not be read at all.

Three processes that look organised and do not work

Each produces a tidy pipeline and an unreliable forecast

Activity stages

Looks like Stages named “called”, “emailed”, “demoed”.

Why it fails They record your effort, not the buyer's state.

Fix Name each stage by what is now true for the customer.

The pipeline that never loses

Looks like Deals that sit open for months.

Why it fails Without a recorded loss reason, nothing is ever learned.

Fix Force an explicit decline, with a reason, after a set period.

The founder-only process

Looks like It works, but only when the founder runs it.

Why it fails It is a skill, not a process, and it cannot be hired into.

Fix Observe and codify before hiring, not after.

CASE STUDY

A Texas multispecialty group

A scheduling redesign that worked by writing down what the schedulers already knew.

CASE STUDY · A TEXAS MULTISPECIALTY GROUP

Codify the rules, keep the people

Expert practice translated into a system that runs consistently

BEFORE

Knowledge in people's heads

THE POSITION

Schedule utilisation stood at 71%. Capacity existed; it was not being converted.

WHY IT VARIED

The process depended on rules schedulers carried individually — effective, and impossible to apply consistently.

THE COST

Same-day cancellations were treated only as lost availability.

AFTER

Rules in the workflow

WHAT CHANGED

Schedulers' tribal rules were codified into the system, with staff kept central to the process.

THE RESULT

Utilisation rose from 71% to 93%; about 3.2 hours of scheduler time saved per day.

WHAT IT UNLOCKED

Automated outreach lifted same-day backfill to 87%; self-scheduling reached 41% of new-patient bookings.

READING THE CASE

Technology succeeded by codifying tribal rules, not by replacing staff. A process design is a translation of expert practice into something that can run consistently.

Drawn from the session case pack.

APPLICATION

Bringing the theory to ClinicFlow

A first sales process that someone else could run

Element	What you define	ClinicFlow example
Qualification rule	Who is worth time, and who is explicitly not.	Practices of 3–15 clinicians with an existing scheduling system. Decline single-practitioner clinics.
Discovery questions	Five, in the customer's language.	“How many slots went unused last week, and how did you find out?”
Demonstration rule	Never generic.	Show their own utilisation pattern, not a sample practice.
Exit criteria	Verifiable by someone not in the room.	Practice manager has named the measure they would judge a pilot by.
Loss discipline	A decline is an outcome, not a gap.	No response after three contacts in three weeks — closed, reason recorded.
The one metric	The stage with the steepest drop.	Discovery-to-demonstration; improve that before generating more leads.

WHAT COMES NEXT

Session 3.2 rehearses the conversations that move a deal between these stages.

SUMMARY

What to carry out of this session

1. **Name stages by the buyer's state, not your activity.**
   "Demoed" records your effort; "has named a next step" records progress.

2. **An explicit disqualification is a good outcome.**
   Without a qualification gate, every enquiry costs the same regardless of whether it could close.

3. **Track their decision process, not only your pipeline.**
   Most delay is internal consensus-building inside the buyer, not doubt about you.

4. **Codify by observing, not by asking.**
   The Texas group wrote down the rules schedulers already used — and kept the schedulers.

5. **Fix the worst conversion before buying more leads.**
   Utilisation rose from 71% to 93% without adding a single new patient.

Sources for this session

Primary references behind each concept

SALES PROCESS	Adamson, B. & Dixon, M. (2011). *The Challenger Sale*. New York: Portfolio.
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