

# **Flowchart the Sales Process**

## **Introduction:**

You have worked very hard in developing and defining your products and services. Then you have worked very diligently in getting the word out about to prospective customers about your wonderful offerings in the marketplace. Now you are about to embark upon the sales journey. You have to work just as hard in developing your sales system as you did in developing your marketing strategy. One method to help you to systemize your sales program is to flowchart your sales process. By flowcharting your sales process, you will begin to take out the ‘mystery’ of your sales process and begin to replace it with a set of repeatable steps to guide you along on your way to sales success. This White Paper will focus on the nuts and bolts of flowcharting your sales process.

## **What Is A Flow Chart?**

A flow chart is a tool for analyzing processes. It allows you to break any process down into individual events, activities, or steps and to display these in a shorthand form showing the logical relationships between them. By constructing flowcharts, you can promote better understanding of the processes. Better understanding of the processes is a key step in improving any operation.

## **Aren't Flow Charts For Engineers?**

There certainly are specialized applications for flowcharting. Computer systems design, computer programming, engineering, and science are popular applications for flowcharting. These specialized applications utilize standardized sets of symbols. However, in most cases, you can rely on three or four simple symbols to cover most types of events.

## **Use Flow Charts To Clarify And Communicate:**

Flowcharting can help clarify what actually happens and/or what needs to happen. Every organization has a wide ranging array of activities that are constantly changing over time in response to new customer demands, regulatory pressures, and competitive situations.

Flow charts offer you a way to control change, rather than having change control you. By clarifying what is actually going on in your process, you can decide whether or not it needs changed.

## **Why Should I Use A Flow Chart Of My Sales Process?**

You may feel that flowcharting your sales process is really an unnecessary step and moreover, it does not apply to your business. And in certain circumstances, you may very well be correct. Nonetheless, you should not let that sort of thinking stifle your creativity. It is not the fact that a sales process flowchart was created that is important. It is the process of creating the sales process flow chart; the dissemination of the flow chart to the sales team; and, the subsequent conversations that are of the greatest value to your organization. The more you get your staff talking about sales and processes, the closer you are to increasing your sales.

Another way to look at the prospect of flowcharting your sales process is that fact that this can become a competitive advantage for you and your organization. By simply having ‘demystified’ the sales process and incorporating your hard earned ‘best practices’ into a flow chart, you have

developed a powerful tool for guiding and motivating your sales team to higher levels of performance.

### **Flowcharting Basics: How to Draw a Flow Chart:**

There are no hard and fast rules for building flow charts. However, there are several useful guidelines that you should keep in mind.

*The following are six steps which can be utilized in constructing a flowchart:*

1. *Describe the process to be charted. This is typically a single declarative statement. For instance, "How to screw in a light bulb."*
2. *Start with a 'trigger' event.*
3. *Note each successive action concisely and clearly.*
4. *Go with the main flow. Put extra detail in other charts.*
5. *Make cross references to supporting information.*
6. *Follow the process through to a useful conclusion and end at a 'target' point.*

### **Flowcharting Basics: A Set of Useful Standard Symbols:**

You can use whatever symbols you chose for the construction of your sales process flow chart. The key is that you be consistent in the usage of your symbols and that you clearly communicate the meaning of each symbol to your audience.

Nonetheless, the following basic symbols are the standard building blocks of most flowcharts and are universally recognized by most flow chart users and creators. (I apologize that I do not have the capability to insert drawings here, so please feel free to use your imagination!)

#### *Flow Chart Standard Symbols:*

- ***Rounded Box*** – This symbol is used to represent an event which occurs automatically. Such an event will trigger a subsequent action, for example, 'receive a customer phone call,' or describe a new state of affairs.
- ***Rectangle or Box*** – The symbol is used to represent an event which is controlled within the process. Typically this will be a step or action which is taken. In most flowcharts, this will be the most frequently used symbol.
- ***Diamond*** – This symbol is used to represent a decision point in the process. Typically, the statement in the symbol will require a 'yes' or a 'no' response. After the response, it branches to different parts of the flowchart accordingly.
- ***Circle*** – This symbol is used to represent a point at which the flow chart connects with another process. The name or reference for the other process should appear within the symbol.

### **Five Mistakes to Avoid When Creating a Flow Chart of Your Sales Process:**

To recap, mapping out your sales process in a flow chart form is a well-known technique for creating a common vision and shared language for improving business results. However, sales

managers and small business owners often make mistakes that undermine the potential of sales process flow charting. A common result is that sales personnel ignore the process and operate 'outside the system.' The following are five common mistakes that tend to hinder the success of this program.

- ***Map all the trees, but miss the forest!*** – In other words, you diligently map all the details of your sales process, but lose track of the big picture. You can have too much detail in your flow chart. You do not want to overwhelm the audience with more information than they can take in at one time. Further, with a cluttered flow chart, all activities seem to have the same importance, which is probably not an accurate reflection of reality.
- ***Focus on the seller, instead of the customer*** – Creating a sales process flow chart is not some academic exercise. Your sales process flow chart has one purpose which is to better serve your customers in a profitable manner. Your sales process flow chart needs to be constructed in a manner that reflects the individual steps in the process and how they create value for your customer
- ***Forget to “show them the money”*** – The bottom line is that your sales process flow chart must integrate tools, skills, and results measurements within the process. This is where the rubber meets the road. You want to have metrics contained within your flow chart. Measurement tools allow your people to participate in setting their own goals by drilling into more detailed analyses to improve performance.
- ***Buy somebody else’s “ideal” sales process*** – To be sure, you can purchase prepackaged sales process flow charts. Oftentimes, these are contained with sales training or customer service training packages. To be sure, these ready made sales process flowcharts can be useful to an organization in terms of exposure to types of charts. However, these prepackaged flow charts should not be implemented off the shelf without deciding their applicability to your business.
- ***Outsource the construction of the flow chart*** – Your sales staff and sales manager might be tempted to delegate this task to a lower level staffer or even to an intern. This is probably the worst mistake that you can make. The sales process flow chart needs to be reflective of the real world, not of some one’s perception. People without sales experience only know what they have heard or read about the sales process. In order for this exercise to be fruitful, it is imperative that you involve the sales team in the construction of the sales process flow chart. PERIOD.

### **Benefits of Flow Charting Your Sales Process:**

The following are just a few of the benefits you and your organization can receive by flowcharting your sales process.

1. *Can be a springboard for further discussion of the sales process*
2. *Can connect with other flowcharts (accounting, purchasing for instance) to explain related activities.*
3. *Can identify points where data can be usefully collected and analyzed.*

4. *Can help to isolate potential sales problem areas.*
5. *Can help communicate the sales process to those unfamiliar with it.*
6. *Can enable your sales team to tap into the customer's value system and trace back a path to your business, products, and/or services.*
7. *Can ensure that your sales team pulls together to create real value*
8. *Can help individuals understand and accept organizational changes across functions.*
9. *Can provide the framework for measuring performance goals, which your sales team can set for themselves.*

### **Should I Draw My Own Flow Chart Or Get Flowcharting Software?**

At the very least, you should hand draw your rough draft of chart. The flowcharting exercise is a very important 'hands-on' activity. Now, if you want to clean up or make your finished chart 'pretty,' then there is no problem in utilizing some flowcharting software.

### **Where to Get Flowcharting Software:**

There are many software packages for flowcharting your sales process. The internet has plenty of examples.

Before you rush out and purchase some flowcharting software, you might want to ask some of your sales colleagues if they could let you borrow their software to create your sales process flowchart. You want to check out your local chapter of the Sales and Marketing Executives organization.

Another idea would be for you to contact your local college or university's business department. Perhaps you could partner with one of their sales classes and jointly work on project to flowchart your sales process while at the same time giving the students some real world experience.

### **EXERCISES:**

1. Survey your business sector or industry. Are Sales Process Flow Charts commonplace? Are your competitors using them? Are you using them?
2. If Sales Process Flow Charts are not commonplace in your business, would they give you a competitive advantage?
3. This is a very 'hands on' activity to create your own Sales Process Flow Chart. Thus, you must involve not only the Sales Manager, but also the sales team, support staff, and other plank holders. You want to have an introductory meeting to explain what flow charts are; how they are constructed; and, to give some examples.
4. Nothing sexy about the next step. Lock your sales team in a room and begin banging out your sales process. Keep at it until you have it all down on paper. Now, you want to start to add measurement steps and data collection points to your sales process.

5. Develop sales baselines prior to creation and implementation of your new Sales Process Flow Chart. Monitor its impact periodically after implementation. Have your sales grown? Are you meeting your expectations? If not, what can you do to tweak the program?
6. Develop methods to collect and analyze information collected from your various measurement points. Disseminate your findings to your key staff. To your customer, if applicable.
7. Whenever your process changes due to new customer requirements, new competitive pressures, new regulatory compliance issues, or other environmental changes, you need to revisit and modify your Sales Process Flow Chart. You do not want your sales team working around the system because it no longer reflects the 'real world.'