Client Acquisition Process

The proven path to ideal clients

emple

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One of the most enlightening resources for a sales team is the map of the Client Acquisition Process.

By following this documented map new salespeople can navigate the path to success with precision and consistency, measuring how they perform vs the benchmarked conversions for each stage.

What is the client acquisition process?

It is a map that documents the journey of the client from enquiry to onboarding.

It encompasses the series of steps and touchpoints that buyers go through, and with each step or stage, they show a deeper commitment by continuing to engage.

It documents a deliberately built process with frameworks and assets that have been built with precision to anticipate buyer needs, build trust and rapport, and help them through their decision-making process, in order to acquire clients with minimal friction.

Your Client Acquisition Process guides you on:

Each activitiy the team needs to do to win the sale

Links to assets and resources you will use

The stages of conversion, on which metrics are calculated

Activities that are included

You will note that each action however small is documented in the process map including:

- Research
- Sending emails
- Appointment bookings
- Sales conversations
- Sending assets
- CRM data entry and pipeline management
- Meeting preparation
- Presentations
- Proposal preparation
- Proposal follow ups
- Other touchpoints (eg: by post or SMS)
- Automations
- Client actions
- Internal team actions including briefing & handover processes.

What it achieves

It is essential to understand what the Client Acquisition Process Map is for and the benefits that come from following it. It will enable you to:

- Be Consistent: Every buyer deserves a best-practice client experience in line with your business' greatest value and brand. By following the documented framework, all team members align their efforts and ensure a unified approach. This consistency builds the brand value and enables a seamless experience for clients, regardless of the salesperson they interact with.
- Anticipate Buyer Needs: The process has been built based on insights into clients' pain points, challenges, and motivations at each stage. We know what criteria we need to meet to be the right solution for them, and what conversations need to take place. This resource empowers you to pre-emptively provide buyers with what they need usually before they ask.
- Educate & Qualify Buyers: The journey has a series of touchpoints, each of which build on the ones before to education, connect, build trust and determine alignment. Don't skip steps! Use all the process and assets so we can identify the right buyers for us as well as the right solutions for them.
- Benchmark Conversions: Using a consistent approach gives us clear conversion metrics from stage to stage. If one salesperson can achieve high metrics, so can others, and you can extrapolate the value of your pipeline with accurate forecasting of revenue for the company and commission revenue for the team.
- Improve Performance: Using a consistent approach allows us to identify if any team member is struggling to convert as well as the benchmark in any particular stage or step. This allows for personalised coaching and support to increase performance and results rapidly.
- Improve the Process via Data: Using this process you will gather data consistently and the business can then review and analyse buyer interactions, identifying areas for enhancement and refining their sales and also their marketing strategies. This data-driven approach empowers your business to evolve this client acquisition process, adapt to changing client needs, and maintain a competitive edge. The precious data you gather will often impact the effectiveness of their marketing strategy.