

ACCOUNT EXECUTIVE SUCCESS SYSTEM

4 STEP PROCESS

1
CAPTURE

- **INTAKE: Gain Insight**
Questions capture your existing best practices. Interviews from existing customers and employees capture your agency's delivery methodology.

- **MAP: Gain Perspective**
See your sales process from 30,000 feet and zoom down to "the street" view. You will see and align your sales goals & strategies to your sales & marketing communications to ideal prospects through your sales funnel.

2
APPLY

- **SALES PROCESS: Gain Clarity**
See your sales funnel clearly.

Customized **Sales Roadmap - External:**
Apply your best practices inside with a proven documented messaging methodology. Each component of your sales funnel has visual steps to drive consistent results.

Customized **Sales Operations Manual - Internal (20+ sales sections):**
Apply a proven documented methodology applied for your agency's sales process to create consistent results.

3
REFINE

- **TRACKING PROCESS: Gain Sales Confidence**
Track deals with confidence.

Friday Productivity Report: Simplified metrics refine the priorities sales projects and momentum.

Call Logs: Simplified spreadsheet tracking to refine where efforts are applied and accomplish the LAGGING results.

4
AUTOMATE

- **SALES PROCESS AUTOMATION: Gain Time**
Selling is set to scale.

CRM streamlining: Messy client/prospect data, and confusing sales/marketing communication is organized to follow up consistently.

Build your sales team: Your sales team has a documented Sales Roadmap utilizing your sales best practices.

ANNUALLY, YOU AND
YOUR SALES TEAM WILL:

Win new business easier

Maximize sales team
consistency

Implement sales
automations

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