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Break the linearity of your sales process. Embrace the cycle of the subscription era

This week, Caroline Franczia, founder of Uppercut-First, compares your typical sales cycle to a foreboding sense of déjà vu. Do you feel like you're living the same day over and over again – and do your customers as well? It's 2020, and you can do better than that. To help you avoid a dysfunctional process and offer a customer cycle instead, Caroline has called upon no other than the exceptional Mary Poppins.

When the time comes to put a sales process in place, CRMs often rely on a laid-out process that only requires slight customisation. The process is very linear, straightforward to follow, and tends to look a bit like this:

Lead – Discovery – Evaluation – Technical Go/No Go – Proposal – Negotiation – Close

You can tweak it and improve it, but, as it is, it will remain a sales approach. It will remain very methodological, starting with a lead and ending with a contract. This process can work fine at the beginning of your story with a prospect, but even in this instance, it is, unfortunately, quite rare that each phase would be detailed enough to guide the team with a customer-centric approach.

> *Bert/Mr Dawes Sr: "Winds in the east, there's a mist coming in, like something is brewing, about to begin."*

In this new decade, more than ever, the standard for many industries is a subscription and renewal model. Even in a tacit renewal situation, your customer has a choice to renew or not renew after his or her initial engagement, typically after 12 months.

> *Mary Poppins: "That's a pie-crust promise; easily made, easily broken!"*

The risk of churn is why I recommend putting in place a cycle (with overlapping of essential roles), rather than a linear process. Something like this:

Lead & Discovery

The Sales Development Representative (SDR) and Account Executive should team up for any prospecting and outbound activity:

Benefits for the company:

- The Account Executive will bring segmentation expertise:
  - why are we targeting these accounts in priority?
  - What business strategies, in the prospect's annual report, align with our

value proposal?

What could we do to solve its problems?

The SDR, on board with this messaging, will uncover critical and decisive information from the prospect’s Operations Department. Unlike in many companies, the SDR should help prepare manager-level meetings and attend these meetings to leverage the information in hunting for more stakeholders in the account, thus growing the opportunity.

Benefits for the customer:

Complete alignment in the outbound messaging

Feel special and not part of mass mailing

Will be open to share with other experts where they believe they need improvement

Customer Cycle: An onboarding and cruising phase usually precedes the prospect’s becoming a fully-fledged customer. And thus, this new phase in the cycle should be worked from then on as a Trio: SDR-Account Executive-Customer Success.

> *Mrs Banks: “As a matter of fact, since you hired Mary Poppins, the most extraordinary things seem to have come over the household.”*
>
> *Mr Banks: “Is that so?”*
>
> *Mrs Banks: “Take Ellen, for instance. She hasn’t broken a dish all morning.”Mr Banks: “Really? Well, that is extraordinary.”*

Evaluation – Technical Go/No Go

When you arrive at this part of the customer cycle, the SDR and Account Executive will have come to understand the problems they can solve. Ideally, the prospect will have shared a clear outline of why it's acting now and the potential business impact on both sides.

During this phase, you want to see the Account Executive working closely with a presales engineer through workshops, to identify use cases and potential technical and security roadblocks, to prepare for an executive presentation.

Customer Cycle: If this is an existing customer, the working pair will become a trio, with a member of customer success staff bringing proof points from other existing projects and key leading indicators.

> *Mary Poppins: "In every job that must be done, there is an element of fun. You find the fun, and the job's a game!"*

Proposal

The proposal is a verbal agreement, incorporating the use cases, technical validation and (ideally) vendor of choice of the executives.

One person usually leads it: the Account Executive, sometimes supported by his or her direct manager. This is, in my humble opinion, a mistake. It is crucial, even for a 'new logo', to show a united front at the moment of the proposal.

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Bringing the Deployment or Services team and a customer success representative to the table reassures the prospect and clarifies the process following the contract signature. It proves expertise and ensures all teams are in alignment so that no terrible surprises or disappointment emerge after the deal is done.

In addition, most proposals should include the customer success renewal fee and potentially additional one-time service fees; these fees are usually better perceived and associated with value when presented by the people who will deliver them. After all, people buy from people and proving expertise can only add value at the moment of the proposal.

> *Mary Poppins: "A spoonful of sugar helps the medicine go down."*

Negotiation

Again, a negotiation should start as a united front for a very particular reason: the person in the room holding the most information usually wins the negotiation.

It is no surprise that, due to their lack of experience, startups drag this phase. As a united front, with crucial information found at operational (SDR), technical and security (pre-sales), and user (customer success) level, a negotiation can be held with a full picture of the situation.

What is the prospective customer going through? And:

1. Why do they need to act?
2. Why this startup specifically?
3. Why now rather than in six months time?

> *Bert: "What did I tell ya? There's the whole world at your feet."*

Win – Onboarding – Deployment – Cruising

After the negotiation should come the win, the customer's celebrations, an onboarding process, a deployment, and a cruising phase.

During these phases, the Deployment and Customer Success teams will lead the way. This new overlap in their roles may well reveal new pains, new champions and new use cases in this new cycle. Referrals and testimonials will allow for constant growth. Here, the SDR, Pre Sales team, and Account Executive should remain involved at all times.

This organised 'Cycle process', with its overlapping of roles, offers direct benefits – from reducing the silos between customer-facing roles, to an overall much smoother customer experience.

> *Bert: "Mary Poppins, practically perfect in every way."*

Caroline Franczia is a regular columnist for Maddyness and the founder of Uppercut First. Experienced in working for large companies such as Oracle, Computer Associates, and BMC, Caroline also lived in Silicon Valley for four years before moving to startups (Sprinklr, Datadog, Confluent) where she witnessed on the ground the benefits of a well-thought sales strategy. These are the foundations of UF: a structure that accompanies the European startups in their sales strategy by giving them an undeniable advantage in their go-to-market.

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