PROVEN PROCESS CHECKLIST

Here are some tips to leverage your proven process to drive sales performance and some things to look at for along the way:

VALIDATE YOUR PROVEN PROCESS

Here are some ways to validate your Proven Process by getting your client's perspective:

- [ ] **ONE-ON-ONE INTERVIEWS**
You make significant investments in sales and marketing, and trusting your gut instinct on how your clients feel about your Proven Process is a risky temptation. Engage a third party to talk with some clients that have recently made a decision to engage your company to help them. At worst, you will confirm what you think you now know. But you will likely be surprised by what you learn, and it is not worth the risk!

- [ ] **FOCUS GROUPS**
For businesses with very high customer lifetime value, a focus group can provide a lot of collective insight that you can use to improve delivery of services. Getting a group of clients together can result in some very dynamic discussions that could lead to actionable insights you would not get in a one-on-one interview. Clients that participate in focus groups may realize an enhanced sense of involvement and commitment to your business.

- [ ] **SURVEYS**
After you get some insight from new clients on their experience, make a plan to keep your pulse on your future clients perspective. Create a survey and send it to all clients after they are finished with the onboarding process. These insights will help you understand when it is time to make tweaks.

ALIGN AROUND THE PROVEN PROCESS

The alignment point for all of the client-facing functions in your organization is your Prove Process. Here are some ways to align your team:

- [ ] **CREATE A BRAND**
Create a brand around it and launch it internally. Hang posters on the wall, including it in prospect / client-facing communications. This shows your business's commitment to your Proven Process and drives adoption.

- [ ] **ALIGN CORE PROCESSES**
The Proven Process is the path to value for your Ideal Clients. Don't create your internal processes in a vacuum. Instead, use your proven process to add context to any prospect / client-facing processes (sales, marketing, client delivery).

PROVEN PROCESS CHECKLIST

ALIGN AROUND THE PROVEN PROCESS (CONTINUED)

- [ ] **MARKETING ALIGNMENT**
  Ensure the handoff from marketing is a seamless process, over communicating so clients know what is going on and why they need to do their homework. An example of this is a video on a Contact Us landing page on your website telling prospects what to expect after they fill out a form.

- [ ] **CLIENT SUCCESS ALIGNMENT**
  Set the client services team up for success by getting them what they need to deliver excellent service. An example of this is an internal knowledge transfer meeting that involves sales and client services before an onboarding meeting with the client.

USE YOUR PROVEN PROCESS!

A lot of proven processes are created at the launch of EOS and then decay on the V/TO. Don't let this happen to you! Here are some ways for your sales team to leverage your Proven Process:

- [ ] **SHOW PROSPECTS WHERE THEY ARE**
  Prospects appreciate understanding where they are and what comes next in their journey. Use it to communicate the path to value throughout the Sales Process. This maximizes clarity and professionalism for your sales team.

- [ ] **QUALIFYING TOOL**
  Use it as a Qualifying tool. Share your Proven Process to a prospect early on in your discussion with prospects. If a prospect doesn't seem to fit with your proven process, then it may not be a good client.

- [ ] **CLOSING TOOL**
  Use your Proven Process as a closing tool. This starts by understanding why your prospects are considering this decision and what compelling events they have upcoming where your value would come into play. Map how your client's compelling event aligns with your proven process to ensure they know what is involved in them getting where they need to go.

PROVEN PROCESS CHECKLIST

MEASURE YOUR PROVEN PROCESS

Most scorecards consist primarily of internal KPIs and metrics that do not measure how your clients navigate your business. Here are some ideas to measure your Proven Process:

- [ ] **MEASURE CONVERSION RATES**
  This is the % of prospects or clients that move to the next stage of the Proven Process. This idea might not apply to all stages, but it works for a lot of them and tells you where you need to focus your efforts in improving.

- [ ] **MEASURE CLIENT SATISFACTION**
  Understanding your client's perspective on how they felt provides immediate actionable insight. Stages like onboarding are great opportunities to send a client a short survey to rate their experience and gather subjective feedback.

- [ ] **TIME IN STAGE**
  Measure time in stages of the Proven Process where possible. This can have financial and client satisfaction implications. If you measure the time spent in a stage like onboarding, it allows you to improve internal processes to streamline the process and help your clients achieve results quicker.

- [ ] **LEADERSHIP SCORECARD**
  Most stages of a Proven Process are cross-functional. Measure the stages on your Leadership Scorecard to determine which stage might be moving in the wrong direction. Then look at the metrics that each department is involved in affecting that stage. That should help you understand the root cause of the problem at the departmental level.

IMPROVE YOUR PROVEN PROCESS

Once your Proven Process is implemented and you are measuring it, get it into a cycle of continuous improvement. Here are some ideas on improving:

- [ ] **CREATE A BRAND**
  Quarterly Reflection: Put it on your quarterly agenda to reflect back on metrics, pick a stage that needs to be improved, and set a cross-functional rock to improve it.

- [ ] **IN LEVEL 10S**
  Improve it in your normal Traction meeting cadence. Some insight gathered presents opportunities for immediate action and improvement. For example, a client survey might include a suggestion for something that can be improved with ease.