How to Build a Killer Sales Workflow for Staffing

We're entering an era of incredible opportunity for staffing, but will your firm be able to fill the pipeline? Do you have a sales workflow that enables reps to propel prospects from 'new lead' to 'new client?'

The firm with the best grasp on the staffing and recruiting sales process will have an early competitive advantage. The companies that use scalable technologies will maintain their advantage long-term.

What makes a great sales workflow for staffing?

When it comes to the ideal sales workflow, you need a scalable and repeatable process that still provides a personalized touch. Sound difficult to do? It shouldn't.

The goal here is to provide the right message to the right person at the right time through the right channel. To do that, you'll need to understand who your buyer is, how they found you, and how they prefer to communicate.

Start by mapping out the buyer's journey for your client base. You need to determine:

- Who is your ideal client?
- What are the major pain points they have, and are you able to solve them?
- How are they finding your firm?
- Are they responsive to direct sales outreach, or do they prefer to own the conversation?
- What content or touch points propel them through the sales cycle?

When you have the answers here, then it's time to start thinking about your sales process. This process will vary depending on your business and your buyer's journey, but all sales tend to follow a similar path.

1. **Attract/identify** – You either attract potential buyers to your brand through marketing or word of mouth, or you have your sales teams source prospects through a prospecting workflow.
2. **Connect** – Once a prospect has been identified, you make first contact to collect qualifying information and gauge interest.
3. **Qualify** – Review the information collected in the first interaction to determine if this prospect will be a good fit for your firm.
4. **Engage** – If the prospect is qualified, then it's time to start engaging. Reach out, provide value, and entice them to schedule a meeting with seamless staffing sales outreach.
5. **Discovery** – This first meeting is all about research. Collect as much information as you can on the business, their needs, their goals, the challenges they face, and the timeline they expect to work within.
6. **Pitch** – Take all of the information that you've learned, put together a proposal, and pitch it to the stakeholders.
7. **Objection handling** – Answer any questions, comments, or concerns that arise from the pitch presentation.
8. **Signatures and close**– If it's a good fit for both parties, a contract will be signed and you can close the deal.
9. **Upsell** – Identify other opportunities for a sale, start at step 3, and work your way down the line for the upsell.

Once you've mapped your process, you can start planning the steps and communications required to meet the needs and expectations of your ideal client for each stage of the journey. Again, these will be unique based on your business and your buyer, but some common sense rules apply.

For example, if Tammi has just been identified as a potential customer, don't send her proposal information. Send her content that helps introduce her to the firm and the value you could provide. This shows that you not only understand where she's at in her process, but that you can meet her needs.

This detailed plan – from first interaction to final signature and all the touch-points in between – is your sales workflow. Test it for a few months, make adjustments as needed, and grow your pipeline with qualified buyers.

What’s the best tech for a sales workflow in the staffing industry?

There are a number of platforms out on the market that can help unify and automate your sales efforts, but only a handful actually focus on the unique needs of the staffing industry.

AviontéBOLD was developed specifically for staffing firms by staffing experts. It’s an end-to-end solution that enables teams to win new clients, recruit the talent to fill the order, manage the workforce, and handle all back-office activity.

From a sales perspective, it offers everything from personalized dashboards and pipeline management to task and activity tracking and comprehensive sales analytics. With AviontéBOLD, you can build a scalable workflow that provides value to your team members, and your bottom line.

AviontéBOLD is also complemented by Avionté+ – an extensive network of pre-vetted, pre-integrated, best-of-breed technologies that enable you to:

- Quickly scale your tech stack with proven partners that focus on the unique needs of the staffing industry.
- Trigger actions from multiple technologies with a single click in a single system of record.
- Put experience first for your teams, talent, and clients alike.

For example, Sense offers an all-in-one engagement platform that focuses on chat, text, and analytics. When combined with AviontéBOLD, your sales teams can trigger targeted messages to prospects, keep tabs on responses, engage further if there’s interest, and lead the prospect further down the sales funnel all without leaving AviontéBOLD.

Sense is one of over 60 pre-integrated partners that Avionté customers can connect with through Avionté+. Other examples include the Haley

Marketing Group integration for digital and traditional marketing services, the AdobeSign integration for quick and compliant e-signatures, and the WorkN integration which allows you to create a centralized mobile experience with a white-labeled mobile app.

If you're ready to upgrade your sales workflows with an end-to-end software for the staffing industry that offers additional power through best-of-breed integrations, then don't wait. Sell more with Avionté today.