Category

Commercial Excellence

Sales Operations & Commercial Process Excellence Playbook

Running sales operations as a genuine process discipline, not a collection of ad hoc administrative tasks

- Practitioner
- Intermediate
- Template Included

- Administrator
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- 3 minute(s)

Overview

A framework for sales operations and commercial process excellence — establishing systematic process documentation, consistent execution discipline, and continuous improvement practice — treating sales operations as a genuine process discipline rather than a collection of reactive, ad hoc administrative tasks.

What distinguishes genuine sales operations process excellence

from simply having a sales operations function? Having a sales operations team means administrative and support tasks are handled by someone; process excellence means those tasks are executed with systematic documentation, consistent discipline, and continuous

improvement practice — the difference between reactive task handling and genuine operational discipline.

Where should sales operations process excellence efforts start?

With documenting and standardizing the highest-impact, most frequently executed processes first — opportunity stage progression criteria, quote approval workflows — rather than attempting comprehensive process documentation across every sales operations activity simultaneously.

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