



# Lean Sales Framework

A Playbook for Startups and SMBs

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## Section 1: Build-Measure-Learn for Sales

The Build-Measure-Learn cycle allows startups and SMBs to create a flexible, data-driven sales process that adapts to customer feedback and real-time results. It applies the core principles of the Lean Startup method to sales by focusing on iteration and learning at each step.

### **Build: The Minimum Viable Sales Process (MVSP)**

- **Ideal Customer Profile (ICP):** Define your ICP based on early data or assumptions about the target market.
- **Value Proposition:** What problem are you solving for your ICP? Develop a simple, clear value proposition.
- **Sales Funnel:** Map out a basic sales funnel with steps like Lead Generation, Qualification, Discovery, and Closing.
- **Initial Outreach Strategy:** Start with a simple outreach strategy like cold emails or LinkedIn outreach.
- **CRM Setup:** Use a lightweight CRM to manage interactions and measure success.

### **Documenting Your Sales Process:**

- Sales scripts, follow-up schedules, objection handling techniques.

### **Suggested Apps for the Build Phase:**

- CRM: HubSpot CRM, Pipedrive, or Close.io.
- Outreach Tools: Apollo.io, SalesLoft, Hunter.io.
- Document Management: Notion or Google Docs.

### **Measure: Key Metrics and Data Collection**

Key Metrics to Track:

- Conversion Rates, Sales Cycle Length, Lead Source Tracking, Deal Size, Customer Feedback.

### **Suggested Apps for the Measure Phase:**

- CRM with Analytics: Pipedrive, Salesforce, HubSpot.
- Sales Dashboards: Klipfolio, Google Data Studio.
- Customer Feedback Collection: Typeform, SurveyMonkey.

### **Learn: Iterating Based on Data**

Steps to Iterate:

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- Refine sales messaging based on customer feedback, optimize ICP targeting, test new approaches.

**Suggested Apps for the Learn Phase:**

- A/B Testing: Mixmax, Outreach.io.
- Sales Playbooks: Guru, Notion.
- Automation Tools: Zapier, HubSpot.

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## Section 2: Sales MVP (Minimum Viable Product for Sales)

The Sales MVP concept aligns with the Lean Startup's MVP methodology, focusing on quickly developing a simple sales process that delivers value while testing key assumptions.

### **Step 1: Start with the Core Elements of Sales MVP**

- Customer Discovery,
- Simplified Sales Funnel,
- Basic Messaging,
- Lean Outreach.

### **Step 2: Validate Sales Hypotheses**

- Lead Generation Tests,
- Discovery Calls,
- Sales Cycle Length.

### **Step 3: Gather Data and Learn**

- Conversion Rate,
- Lead Quality,
- Customer Feedback,
- Sales Cycle Efficiency.

### **Suggested Apps for Sales MVP:**

- CRM: HubSpot, Copper CRM.
- Lead Generation: Apollo.io, LinkedIn Sales Navigator.
- Email Outreach: Mailshake, Mixmax.
- Discovery Call Tools: Calendly, Loom.

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## Section 3: Innovation Accounting for Sales

Innovation accounting tracks progress in early sales processes with actionable metrics that drive decision-making.

### **Step 1: Define Actionable Metrics for Sales**

- Customer Acquisition Cost (CAC),
- Lifetime Value (LTV),
- Lead Conversion Rate,
- Sales Velocity,
- Churn Rate.

### **Suggested Apps for Innovation Accounting:**

- CAC/LTV Tracking: ProfitWell, ChartMogul.
- Lead Conversion Rate: HubSpot CRM, Pipedrive.

### **Step 2: Implement Split Testing in Sales**

- Run A/B tests on Email Campaigns,
- Sales Scripts,
- Follow-Up Cadences.

### **Step 3: Pivot or Persevere Based on Metrics**

Pivoting Examples:

- Adjust customer segment,
- change messaging,
- or sales funnel if CAC is high or conversions are low.

Persevering Examples:

- If LTV is increasing and sales velocity is improving, continue optimizing.

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## Section 4: Pivot or Persevere in Sales Strategy

Deciding whether to pivot or persevere is based on analyzing sales metrics like conversion rates and customer acquisition cost.

### **Step 1: Identifying When to Pivot**

- Low Lead-to-Deal Conversion Rates,
- High CAC,
- Long Sales Cycles,
- Market Feedback.

### **Step 2: When to Persevere**

- If conversion rates, CAC, and sales cycle metrics are improving, persevere with continued optimizations.

### **Step 3: Data-Driven Decisions**

- KPIs like Lead Conversion Rate,
- Sales Velocity,
- CAC inform pivot
- or perseverance decisions.

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## Section 5: Continuous Sales Learning and Feedback Loops

Continuous learning ensures that decisions are based on real-time data from both internal and external sources.

### **Step 1: Building a Culture of Continuous Learning**

- Knowledge sharing,
- post-sale reviews,
- ongoing training and development.

### **Suggested Tools for Continuous Learning:**

- Sales Training Platforms: MindTickle, SalesHood.
- Post-Call Analytics: Gong.io, Chorus.ai.

### **Step 2: Implementing Feedback Loops**

- Gather customer and internal feedback and use data to adjust your process.

### **Step 3: Learning from Data and Adjusting**

- Refine ICP, product features, and sales process based on feedback.

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## Section 6: Build Scalable Sales Systems

Once validated, the next step is to create scalable, repeatable systems for managing sales and onboarding new hires.

### Step 1: Document the Sales Process

- Sales Playbook, Onboarding Process for New Hires.

### Step 2: Automate Repetitive Sales Tasks

- Lead Nurturing Automation,
- CRM Workflows,
- Reporting Automation.

### Step 3: Implement Scalable Sales Metrics

- Sales Efficiency,
- Lead Response Time,
- Sales Cycle Time.

### Step 4: Scale the Sales Team

- Standardized Hiring Profiles,
- Onboarding at Scale,
- Mentoring and Coaching.

### Step 5: Build a Strong Sales Culture

- Data-Driven Mindset,
- Collaboration and Knowledge Sharing,
- Recognition and Rewards.

### Suggested Tools for Building Sales Culture:

- Recognition Platforms: Bonusly, Kazoo.
- Collaboration Tools: Slack, Microsoft Teams.

### Summary:

Building a scalable sales system ensures that the growth achieved through experimentation and feedback can be maintained as your team expands. This requires documenting processes, automating repetitive tasks, tracking the right metrics, and building a strong team culture that embraces data-driven decision-making and collaboration. As you scale, the goal is to ensure consistency and efficiency without sacrificing the flexibility that drove your initial success.



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## Conclusion: The Lean Sales Framework in Action

The Lean Sales Framework combines the agility of the Lean Startup methodology with the real-world demands of a growing sales organization. Each section of this framework emphasizes the importance of iteration, learning, and scalability. By starting with a Sales MVP, continuously testing and gathering feedback, and focusing on data-driven decision-making, startups and SMBs can develop a sales process that is both adaptable and effective.

The key takeaways of the Lean Sales Framework are:

- Always start small with an MVP approach and iterate based on data.
- Focus on actionable metrics that directly impact sales efficiency.
- Make data-driven decisions when determining whether to pivot or persevere.
- Build continuous feedback loops that drive learning and improvement.
- Scale your sales process by documenting, automating, and training new team members.

By following this framework, sales teams can unlock sustainable growth, respond rapidly to market changes, and build a scalable system that supports long-term success.

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## Comparison: Lean Startup Methodology vs Lean Sales Methodology

<b>The Lean Startup Methodology</b>	<b>The Lean Sales Methodology</b>
<b>Build-Measure-Learn Cycle</b> Develop the Minimum Viable Product (MVP) to test assumptions quickly and gather feedback.	<b>Build-Measure-Learn for Sales</b> Develop the Minimum Viable Sales Process (MVSP) to test sales assumptions with a basic sales funnel and collect data.
<b>Minimum Viable Product (MVP)</b> Create the simplest version of the product that delivers value to early customers and tests assumptions.	<b>Sales MVP (Minimum Viable Product for Sales)</b> Focus on a simplified sales funnel to test key assumptions and optimize customer discovery, qualification, and closing strategies.
<b>Innovation Accounting</b> Track progress with actionable metrics like customer acquisition cost (CAC), lifetime value (LTV), and product-market fit.	<b>Innovation Accounting for Sales</b> Measure key sales metrics like conversion rates, sales velocity, and customer acquisition cost to evaluate the effectiveness of the sales process.
<b>Pivot or Persevere</b> Decide whether to pivot the product or business model based on market feedback and data.	<b>Pivot or Persevere in Sales Strategy</b> Decide whether to pivot the sales strategy, target market, or messaging based on data-driven insights and sales performance.
<b>Continuous Learning</b> Foster a culture of continuous innovation, learning from customers, and iterating based on feedback.	<b>Continuous Sales Learning and Feedback Loops</b> Create feedback loops from customer interactions and sales data to continuously improve sales processes and messaging.
<b>Scale the Business</b> Once validated, scale the product and business by creating systems for growth, including hiring, operations, and marketing.	<b>Build Scalable Sales Systems</b> Build scalable sales systems with documented processes, automation, metrics, and a strong sales culture to ensure sustainable growth.

Table 1: Side-by-Side Comparison of Lean Startup Methodology and Lean Sales Methodology



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