Optimizing Sales Operations and Workflow Efficiency Training Course



23 - 27 Nov 2026

Boston

7500 € (Per Person)

Ref: #SAL4781_130235

Course Introduction / Overview:

This course provides a comprehensive exploration of sales operations, transforming it from a support function into a strategic driver of business growth. In today's competitive market, sales success is no longer just about individual talent; it hinges on the efficiency and effectiveness of the underlying processes and workflows. This program delves into the core principles of sales process optimization, workflow automation, and data-driven decision-making. Participants will learn to design, implement, and manage a high-performing sales engine that reduces friction, shortens sales cycles, and maximizes revenue. Drawing on foundational concepts from experts like Jason Jordan, author of "Cracking the Sales Management Code", the course emphasizes the importance of managing sales activities and metrics to achieve desired business outcomes. BIG BEN Training Center has designed this curriculum to equip professionals with the practical skills needed to analyze their current operations, identify bottlenecks, and deploy technology and strategies that create a scalable and predictable sales model, ensuring sustainable success and a significant competitive advantage.

Target Audience / This training course is suitable for:

- Sales Operations Managers and Specialists.
- Sales Managers and Team Leaders.
- Business Development Executives.
- CRM Administrators and Analysts.
- Sales Enablement Professionals.
- Account Managers and Executives seeking to improve efficiency.
- Operations Managers involved in the sales process.
- Revenue Operations (RevOps) professionals.

Target Sectors and Industries:

- Technology and Software.
- Financial Services and Banking.
- Manufacturing and Industrial Goods.
- Healthcare and Pharmaceuticals.
- Telecommunications.
- Retail and E-commerce.
- Professional and Consulting Services.
- Government and Public Sector Agencies.

Target Organizations Departments:

- Sales Department.
- Business Development Department.
- Operations Department.
- Marketing Department.
- Customer Success and Service Departments.
- Finance and Accounting Departments.
- Information Technology Department.

Course Offerings:

By the end of this course, the participants will have able to:

- Design and map end-to-end sales processes for clarity and efficiency.
- Identify and eliminate bottlenecks within the sales cycle.
- Optimize CRM systems and other sales technologies for maximum productivity.
- Develop and analyze key sales performance metrics and dashboards.
- Implement effective lead management and opportunity scoring systems.
- Master quantitative sales forecasting techniques for greater accuracy.
- Structure sales territories and set achievable quotas.
- Automate repetitive sales tasks to free up time for core selling activities.
- Align sales operations with overall business and marketing strategies.
- Champion change and drive the adoption of new processes and tools.

Course Methodology:

The training methodology at BIG BEN Training Center is designed to be highly interactive, practical, and results-oriented. This course moves beyond theoretical lectures to immerse participants in real-world scenarios that mirror the challenges they face in their roles. The learning experience is built upon a foundation of expert-led instruction, combined with collaborative group discussions, and peer-to-peer knowledge sharing. A significant portion of the course is dedicated to hands-on workshops and practical exercises where participants will map existing workflows, analyze sales data sets, and design improved processes. We will utilize a variety of case studies from different industries to illustrate best practices and common pitfalls in sales operations. Participants will receive continuous feedback from the instructor and their peers, fostering a dynamic and supportive learning environment. This blended approach ensures that attendees not only understand the concepts of sales workflow efficiency but also leave with the confidence and skills to apply them directly to their organizations, driving immediate and measurable improvements.

Course Agenda (Course Units):

Unit One: Foundations of Modern Sales Operations

- The strategic role of sales operations in business growth.
- Core functions and responsibilities of a sales operations team.
- Understanding the end-to-end sales process from lead to closure.
- Techniques for mapping and documenting existing sales workflows.
- Identifying key stakeholders and establishing cross-functional alignment.
- The relationship between sales, marketing, and customer success operations.
- Defining key performance indicators (KPIs) for sales operations success.

Unit Two: Designing and Optimizing Sales Processes

- Principles of effective lead management and routing.
- Developing a structured opportunity management framework.
- Optimizing the quoting, proposal, and contract generation process.
- Analyzing the sales funnel to identify conversion issues.
- Applying process improvement methodologies like Lean and Six Sigma to sales.
- Best practices for managing sales territories and account distribution.
- Implementing a robust sales data governance and hygiene strategy.

Unit three: Leveraging Technology for Sales Efficiency

- Conducting a sales technology stack audit and gap analysis.
- Advanced CRM optimization techniques for workflow automation.
- Evaluating and selecting new sales tools and software.
- Integrating different platforms to create a seamless data flow.
- Building insightful sales dashboards and reports for decision-making.
- Using analytics to uncover trends and performance insights.
- Introduction to lead scoring and predictive analytics models.

Unit Four: Sales Performance Management and Enablement

- Developing data-driven sales forecasting models.
- Methodologies for setting fair and motivating sales quotas.
- Fundamentals of designing sales compensation and incentive plans.
- Creating effective sales onboarding and continuous training programs.
- Building a content management strategy for sales collateral.
- The role of sales operations in coaching and performance reviews.
- Conducting win-loss analysis to refine sales strategy.

Unit Five: Strategic Leadership and the Future of Sales Operations

- Transitioning sales operations from a tactical to a strategic function.
- Developing a long-term roadmap for sales operations initiatives.
- Managing change and driving user adoption of new processes and tools.
- The impact of Artificial Intelligence (AI) on sales operations.
- Principles of Revenue Operations (RevOps) for holistic growth.
- Presenting the business case for sales operations investments.
- Capstone Project: Developing an action plan for your organization.

FAQ:

Qualifications required for registering to this course?

There are no requirements.

How long is each daily session, and what is the total number of training hours for the course?

This training course spans five days, with daily sessions ranging between 4 to 5 hours, including breaks and interactive activities, bringing the total duration to 20 - 25 training hours.

Something to think about:

As sales technology evolves with AI and automation, how can sales operations leaders balance technological efficiency with the essential human element of sales?

What unique qualities does this course offer compared to other courses?

This course distinguishes itself by adopting a holistic, strategic framework for sales operations, moving beyond the typical focus on CRM administration and reporting. While many programs teach how to use tools, this training focuses on developing the critical thinking skills needed to design the entire sales engine. It emphasizes the "why" behind the "what," enabling participants to build scalable, efficient processes tailored to their specific business context rather than just applying generic templates. The curriculum is deeply rooted in practical application, using real-world case studies and hands-on workshops where participants work on tangible problems, such as process mapping and data analysis. Furthermore, the course content is forward-looking, addressing the integration of AI and the shift towards a unified Revenue Operations (RevOps) model. Participants will not only learn to optimize current workflows but will also gain the strategic foresight to build a sales operations function that can adapt and thrive in the future, making them invaluable assets to their organizations.