

Sales Management Improvement Analysis

Introduction: Many businesses grow to have a sales team but not a dedicated Sales Manager. As a result, important sales management functions may be overlooked and sales results may suffer. This 21-point self-assessment is designed to help business owners and senior managers identify the scope and specific areas for improvement in their sales management activities. For each criterion mark the current state (using 'X') and the future desired state (using 'O'). Then calculate the Improvement Score for each criterion by subtracting X from O. Total all the Improvement Scores and review the recommendations for your score range.

	Sales Management Criteria	How well are you doing this now? (current: mark as X)	Where would you like to be in 12 months? (future: mark as O)	Calculate the Improvement Score e.g. O (8) - X (4) = 4
1	Has an annual seasonally adjusted sales budget with accurate monthly sales targets for the business.	<u>1 2 3 4 5 6 7 8 9 10</u>		
2	Has a written sales strategy that identifies sales priorities and resource levels available to pursue those opportunities.	<u>1 2 3 4 5 6 7 8 9 10</u>		
3	Has one manager (the Sales Leader) who is responsible for the performance of the sales team, and that manager is held accountable for sales results.	<u>1 2 3 4 5 6 7 8 9 10</u>		
4	Each seller has a specific sales budget in monetary value (sales or profit).	<u>1 2 3 4 5 6 7 8 9 10</u>		
5	Each seller has a detailed Position Description that includes their Key Performance Indicators (KPI's) and measures of success.	<u>1 2 3 4 5 6 7 8 9 10</u>		
6	Sellers submit weekly sales reports, either written or verbal.	<u>1 2 3 4 5 6 7 8 9 10</u>		
7	Sellers provide written monthly sales reports that include identifying progress towards achieving their KPI's.	<u>1 2 3 4 5 6 7 8 9 10</u>		
8	Sellers individual monthly reports are always collated promptly into one overall report giving an accurate picture of sales progress for the business.	<u>1 2 3 4 5 6 7 8 9 10</u>		
9	The monthly sales reports are thoroughly reviewed, questioned and acted upon by the Sales Leader.	<u>1 2 3 4 5 6 7 8 9 10</u>		
10	Sellers receive a weekly coaching session or meeting with the Sales Leader to assist them with improving their sales capabilities.	<u>1 2 3 4 5 6 7 8 9 10</u>		
11	The Sales Leader regularly accompanies sellers on visits/calls to clients.	<u>1 2 3 4 5 6 7 8 9 10</u>		
12	Major quotes/proposals are always reviewed against criteria by the Sales Leader before they are sent to clients.	<u>1 2 3 4 5 6 7 8 9 10</u>		
13	The sales team are involved in the development of new marketing initiatives and sales support material.	<u>1 2 3 4 5 6 7 8 9 10</u>		

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14	Sellers receive performance reviews/discussions at least every 6 months.	<u>1 2 3 4 5 6 7 8 9 10</u>	
15	A structured management meeting is held each month.	<u>1 2 3 4 5 6 7 8 9 10</u>	
16	The Sales Leader always attends the monthly management meeting and presents sales outcomes and priorities for discussion.	<u>1 2 3 4 5 6 7 8 9 10</u>	
17	The sales team has undertaken a structured capability assessment to determine areas for their own professional and personal development.	<u>1 2 3 4 5 6 7 8 9 10</u>	
18	Each seller has a personal development plan including specific actions.	<u>1 2 3 4 5 6 7 8 9 10</u>	
19	A process is used for reviewing the sales pipeline (initial contacts made; deals in progress; likelihood of success etc).	<u>1 2 3 4 5 6 7 8 9 10</u>	
20	Sellers undertake annual territory and/or account review as part of the annual sales planning process.	<u>1 2 3 4 5 6 7 8 9 10</u>	
21	The sales team undertakes skills development training at least every quarter.	<u>1 2 3 4 5 6 7 8 9 10</u>	
Total Improvement Score			

How to interpret your Improvement Score

Improvement Score Total	Recommendations
0 to 65	Congratulations. You are already performing near your desired level . It is recommended you focus efforts on those criteria which you gave the highest Improvement Scores or those which will have most impact on achieving your immediate goals, whilst maintaining your current activities.
66 to 130	You have a significant desire for improvement and will need to prioritise carefully to ensure you and your team do not get overwhelmed with change. You may benefit from external advice to assist with exploring possibilities and understanding the impact and synergies of planned changes.
131 to 189	You have recognised the need for major development of your sales management processes. For this scale of change it is strongly recommended to develop a staged improvement plan, with each stage being closely monitored for impact to ensure smooth progress with future stages.

Your next step

For a more detailed review of your Improvement Score contact Marketing Nous and request a copy of the Sales Management Improvement Analysis **Discussion Sheet**. For information on how you can benefit from outsourcing sales management activities visit www.marketingnous.com.au/outsourced-sales-management/