

Customized Sales Process Evaluation



Name of Company:

Primary Contact:

Number of Sales Employees:

Sales Evaluation Date:

Conducted by:

PREPARED BY: Turning Point HCM

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Activities

SECTION 1 – General

1) What do you think the biggest struggle has been in hiring and retaining salespeople?

2) Does your company sell a product? ☐ Yes ☐ No _____

a) What product do you sell? _____

3) Does your company sell a service? ☐ Yes ☐ No _____

a) What services do you sell? _____

4) Is it a professional service? ☐ Yes ☐ No _____

5) Is it B2B? ☐ Yes ☐ No _____

6) Is it B2C? ☐ Yes ☐ No _____

7) Do you sell to CEO/Owner? ☐ Yes ☐ No _____

8) Do you sell to department head? ☐ Yes ☐ No _____

9) Do you have a sales force? ☐ Yes ☐ No _____

10) Are there any professional certifications or licenses? ☐ Yes ☐ No _____

a) What Certifications or Licenses are required? _____

11) How many salespeople do you have? _____

14) Compared to your competition where does your company rank? _____

15) Would you say your product/service is a commodity? ☐ Yes ☐ No _____

16) Is your company growing? ☐ Yes ☐ No _____

a) If so by how much?

5-10% ☐ 10-20% ☐ 20-30% ☐ 30-40% ☐ more than 40% ☐

	Observation?	Points
15) What is this growth attributed to? _____		
16) Are you losing business? _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____
17) What is this attributed to? _____		
18) Do you know your cost of acquiring new business? _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____
Marketing _____ Entertainment _____ Meeting Time _____ Prospecting _____		
17) Who manages your sales team?		
You <input type="checkbox"/> Sales Manager <input type="checkbox"/> No real Management <input type="checkbox"/>		
18) What is the average size of your sales?		
0-10k <input type="checkbox"/> 10k to 20k <input type="checkbox"/> 20-50k <input type="checkbox"/> 50k+ <input type="checkbox"/>		
19) Is your revenue recurring? _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____
20) How long on average do your clients stay with you?		
Less than 1 yr <input type="checkbox"/> 1-3 yrs <input type="checkbox"/> 3 years + <input type="checkbox"/>		
21) Do you replace an existing service? _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____
22) What service company do you replace? _____		

SECTION 1A – Verbal Logo©

- 1) Do you have a Verbal Logo©? ☐ Yes ☐ No _____
- a) If yes, what is it? _____
- b) Do your salespeople know it verbatim? ☐ Yes ☐ No _____
- 2) Do you have a Digital Logo? ☐ Yes ☐ No _____
- a) If yes, how much did that cost?
- Under \$1000 ☐ \$1000 - \$5000 ☐ \$5000 - \$10,000 ☐
- 3) Do you have a working web site? ☐ Yes ☐ No _____
- a) If yes, how much did that cost?
- Under \$1000 ☐ \$1000 - \$10000 ☐ More than \$10,000 ☐

SECTION 2 – Process

1) Do you have a Customer Relationship Management (CRM) System?

☐ Yes ☐ No _____

(If **no** go to question 10)

a) Name of CRM _____

b) Does everyone in the company use the system? ☐ Yes ☐ No _____

2) Is this CRM web-based? ☐ Yes ☐ No _____

3) Is a web-based CRM important to you and your company? ☐ Yes ☐ No _____

4) Are you happy with your current CRM? ☐ Yes ☐ No _____

5) If no, why?

Not robust enough ☐ Limited access ☐ Not customizable ☐

Other _____

6) How updated is the contact data?

100% ☐ 75% - 100% ☐ 50% - 75% ☐ Less than 50% ☐

7) Do you track opportunities within your CRM? ☐ Yes ☐ No _____

8) Do you set tasks in you CRM? ☐ Yes ☐ No _____

9) Do you set up sales flow and activities in your CRM? ☐ Yes ☐ No _____

a) Are they automatically triggered activity series? ☐ Yes ☐ No _____

b) Who set up these series? _____

c) Do you review these series to make sure workflow is smooth?

☐ Yes ☐ No _____

10) Would you say you and your sales staff actively input activities & tasks?

☐ Yes ☐ No _____

	Observation?	Points
11) Do you feel your CRM matches the real-world tasks your people experience?	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____
12) Can you see or access your salespeople's calendar?	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____
13) Do you track your customers through your CRM?	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____
14) Do you have a plan on how many "touches" you have with your customers?	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____
a) Can I see that plan? <input type="checkbox"/> Yes <input type="checkbox"/> No	Received copy: <input type="checkbox"/> Yes <input type="checkbox"/> No	
15) Who is doing most of the work in dealing with your customers:		
a) You <input type="checkbox"/> Salespeople <input type="checkbox"/> Account Mgr <input type="checkbox"/> Admin Staff <input type="checkbox"/>		
16) Do you have a standardized set of emails, documents and surveys that go out regularly to your customers?	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____
17) Walk me through your sales process from lead, prospect, appointment, order, fulfillment and then retention.		

SECTION 3 – Sales (Hiring)

- 1) Do you hire salespeople from a sales recruiter? ☐ Yes ☐ No _____
 - a) How successful has that been?

Very ☐ Somewhat ☐ Not Very ☐ Bust ☐
 - b) What cost would you estimate were involved in using a recruiter?

Under \$1000 ☐ \$1000 - \$5000 ☐ \$5000 - \$10,000 ☐ more than \$10,000 ☐
 - c) Are any of your current salespeople the result of a recruiter?

☐ Yes ☐ No _____
- 2) Do you ever use hiring sites like Indeed or Craig's List? ☐ Yes ☐ No _____
 - a) How successful has that been?

Very ☐ Somewhat ☐ Not Very ☐ Bust ☐
 - b) Are any of your current salespeople the result of a hiring site?

☐ Yes ☐ No _____
- 3) Do you use any personality testing for your hired salespeople?

☐ Yes ☐ No _____
- 4) Do you have a written list of key accountabilities for hiring? ☐ Yes ☐ No _____

Can I have a copy? ☐ Yes ☐ No Received copy: ☐ Yes ☐ No
- 5) Over the past 3 years how many salespeople have you been through?

0-2 ☐ (1) 3-5 ☐ (-1) 6-10 ☐ (-2) more than 10 ☐ (-3) _____
- 6) Do you perform exit interviews? ☐ Yes ☐ No _____
- 7) If you can recall, what was the most common cause of people leaving?

Lack of compensation ☐ Lack of training ☐ Lack of benefits ☐ Lack of leads ☐

Lack of direction ☐ Lack of training ☐ Other: _____

	Observation?	Points
8) Have you terminated salespeople over the last 3 years?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
a) If yes, how many?		
0-2 <input type="checkbox"/> (0) 3-5 <input type="checkbox"/> (-1) 6-10 <input type="checkbox"/> (-2) more than 10 <input type="checkbox"/> (-3)		_____
9) Do you have a set list of Expectations the salespeople can expect from you?	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____
Can I have a copy? <input type="checkbox"/> Yes <input type="checkbox"/> No	Received copy: <input type="checkbox"/> Yes <input type="checkbox"/> No	
10) Do you have a set list of Expectations you expect from the salespeople?	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____
Can I have a copy? <input type="checkbox"/> Yes <input type="checkbox"/> No	Received copy: <input type="checkbox"/> Yes <input type="checkbox"/> No	
11) Do you assess the salespeople you hire?	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____
How do you assess them?	_____	
12) What assessments are you using?		
DISC <input type="checkbox"/> Myers Briggs <input type="checkbox"/> Other <input type="checkbox"/> _____		
13) Have you bench marked your salespeople?	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____
14) Do you track key performance indicators for your salespeople?	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____
How?	_____	

SECTION 3 – Sales (Compensation)

1) How are your salespeople paid?

Commission only ☐ Base + Comm ☐ Draw + Comm ☐ Salary + Bonus ☐

If there is a base salary how much is that? \$_____

2) Is commission based on:

% of profit ☐ Set amount ☐ One time ☐ Recurring ☐ Other: _____

4) Do you have a commission contract with your salespeople? ☐Yes ☐No _____

5) Do you believe this is how your competition is paying their salespeople?
☐Yes ☐No _____

6) Do your salespeople have sales quotas or sales goals? ☐Yes ☐No _____

7) What happens when they exceed their goal? _____

8) Do most of your sales reps perform above expectations? ☐Yes ☐No _____

9) What happens when they don't exceed their goal? _____

10) Are salespeople responsible for retention? (-1) ☐Yes ☐No _____

11) Are they compensated for retention? (-1) ☐Yes ☐No _____

12) Do your salespeople have set territories? ☐Yes ☐No _____

13) Any complaints that commissions have not been tracked correctly?
☐Yes ☐No _____

14) Have salespeople ever complained about the equity of sales territories?
☐Yes ☐No _____

15) What do your salespeople earn?

Low end: \$_____ Average: \$_____ Top: \$_____

16) What do you expect your salespeople to earn? \$_____

17) Do you offer expense allowances?

☐ Yes ☐ No

If yes, which allowances do you offer?

Auto ☐ \$_____

Phone ☐ \$_____

Travel ☐ \$_____

Technology ☐ \$_____

Meals ☐ \$_____

Other ☐ \$_____

16) What other benefits do you offer salespeople?

Health Insurance ☐

Dental Insurance ☐

Vision Insurance ☐

Life Insurance ☐

LTD insurance ☐

401k ☐

Other: _____

SECTION 3 – Sales (Training)

- 1) Do you have a set sales training program? ☐ Yes ☐ No _____
 Can I have a copy? ☐ Yes ☐ No Received copy: ☐ Yes ☐ No
- 2) Do you have a set sales process? ☐ Yes ☐ No _____
 a) Do your salespeople know it? ☐ Yes ☐ No _____
 b) Can your salespeople recite your company's sales process verbatim? ☐ Yes ☐ No _____
 Can I have a copy? ☐ Yes ☐ No Received copy: ☐ Yes ☐ No
- 3) Do you provide your salespeople with "Mental Anguish Questions"? ☐ Yes ☐ No _____
- 4) Do your salespeople know them? ☐ Yes ☐ No _____
- 5) How often to you go on sales calls with your salespeople?
 Every Call ☐ (-1) 1x a Week ☐ (1) 1x every 2 weeks ☐ (1) 1x per month ☐ (0)
 Rarely ☐ (-2) Never ☐ (-3) _____
- 6) Are salespeople trained on prospecting technics? ☐ Yes ☐ No _____
- 7) Do you have a written target audience statement? ☐ Yes ☐ No _____
 a) If yes, is it a paragraph or less? ☐ Yes ☐ No _____
 Can I have a copy? ☐ Yes ☐ No Received copy: ☐ Yes ☐ No
 b) Can you and your sales representatives repeat it verbatim? ☐ Yes ☐ No _____
 c) Do you ever test your salespeople on this? ☐ Yes ☐ No _____
- 8) What problem does your company solve?

	Observation?	Points
a) Do you have this written down?	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____
Can I have a copy? <input type="checkbox"/> Yes <input type="checkbox"/> No	Received copy: <input type="checkbox"/> Yes <input type="checkbox"/> No	
b) Can every one of your salespeople repeat it verbatim?	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____
c) Do you ever test your salespeople on this?	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____
9) Have you defined the 6 most common objections to your product/service?	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____
10) Have you given the salespeople ways to overcome these objections?	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____
11) Can your salespeople repeat them back to you?	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____
12) What are the 3-5 Sales Management requirements by objectives?		
Cold Calls <input type="checkbox"/> Meetings <input type="checkbox"/> Referrals <input type="checkbox"/> Networking <input type="checkbox"/> Appointments <input type="checkbox"/> Marketing <input type="checkbox"/>		
12) Can your salespeople tell you what % of business comes from each objective?	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____
13) Do you have set scripts?	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____

SECTION 3 – Sales (Prospecting)

1) How many leads are in your target audience?

0-5000 ☐ 5001-10,000 ☐ 10,000 + ☐

2) Are salespeople given leads? ☐ Yes ☐ No _____

3) Do you have a set marketing program? ☐ Yes ☐ No _____

4) Who implements this marketing program?

You ☐ Salespeople ☐ Account Mgr ☐ Admin Staff ☐ Out Sourced ☐

5) In your estimation, is your marketing helping sales? ☐ Yes ☐ No _____

6) Does your marketing program utilize email campaigns? ☐ Yes ☐ No _____

7) Do you utilize a telemarketer for leads? ☐ Yes ☐ No _____

8) Do you have set telemarketing scripts that each salesperson can repeat?
☐ Yes ☐ No _____

9) What is the cost of your telemarketing?

Per hour \$_____ Hours per week _____

10) How many Leads / Appointments are they generating per week?

☐ (0) 3-5 ☐ (+1) 6-10 ☐ (+2) more than 10 ☐ (+2) _____

11) Do you have a success formula? ☐ Yes ☐ No _____

12) How many Leads_____ Prospects _____ Meetings _____ do they need to reach goal?

13) How many new sales calls are your salespeople expected to have each week?

0-2 ☐ (-1) 3-5 ☐ (0) 6-10 ☐ (+1) more than 10 ☐ (+2) _____

14) Do you network? ☐ Yes ☐ No _____

15) What type of networking do you do?

	Observation?	Points
16) Do you task your salespeople with networking?	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____
17) Do you know how many unique conversations are needed to meet goal?	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____
a) If yes, how many? _____		
18) Do you know where your leads come from (Prospecting Plan)?	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____
Linked In <input type="checkbox"/> Referrals <input type="checkbox"/> Cold Calls <input type="checkbox"/> Mailings <input type="checkbox"/> Web Site <input type="checkbox"/> Other <input type="checkbox"/>		
19) Do you have specific messaging on how to ask for referrals?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
20) Do your salespeople know it verbatim?	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____

SECTION 3 – Sales (Appointments / Preparation)

- 1) Do you have a pre-sales call check list? ☐ Yes ☐ No _____
- 2) Who prepares the marketing materials for the sales call? _____
 You ☐ (-1) Salespeople ☐ (-1) Account Mgr ☐ (-1)
 Admin Staff ☐ (+1) Other ☐
- 3) How long does your average news sales appointment last?
 0-15 min ☐ 15-30 min ☐ 30-45min ☐ 45-60min ☐ 60min + ☐
- 4) How long is your sales process on average?
 1 appointment ☐ 1-2 appointments ☐ 2-3 appointments ☐ 3 or more appointments ☐
- 5) On average how long do you or your sales managers spend on Prepping or Role Playing?
 None at all ☐ (-1) Less than an hour ☐ (0) Over prepared ☐ (+1) _____
- 6) Do you have a set criteria that each sales person knows to qualify prospect?
☐ Yes ☐ No _____
- 7) Do your salespeople understand the different behavior types?
☐ Yes ☐ No _____
- 8) How do you train them on behavior types?
 DISC ☐ Myers Briggs ☐ Other ☐

SECTION 3 – Sales (Appointment)

- 1) Do your salespeople go on calls themselves? ☐ Yes ☐ No _____
- 2) Do you have a team selling approach? ☐ Yes ☐ No _____
- 3) Who are you selling to? _____

- 4) Where does the sales process start?
Influencer ☐ Decision Maker ☐ Other ☐
- 5) Do you track sales compared to who you meet with? ☐ Yes ☐ No _____
- 6) Do you feel there is an agenda for each sales call? ☐ Yes ☐ No _____
- a) If there is an agenda, is it followed? ☐ Yes ☐ No _____

SECTION 3 – Sales (Proposal/Meeting Materials)

- | | | |
|---|---|-------|
| 1) Do you have standardized meeting materials? | <input type="checkbox"/> Yes <input type="checkbox"/> No | _____ |
| Can I have a copy? <input type="checkbox"/> Yes <input type="checkbox"/> No | Received copy: <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| 2) Who prepares that material for meetings? | | _____ |
| You <input type="checkbox"/> (-1) Salespeople <input type="checkbox"/> (-1) Account Mgr <input type="checkbox"/> (-1) | | |
| Admin Staff <input type="checkbox"/> (1) Other <input type="checkbox"/> _____ | | |
| 3) Do you have a consistent set proposal? | <input type="checkbox"/> Yes <input type="checkbox"/> No | _____ |
| Can I have a copy? <input type="checkbox"/> Yes <input type="checkbox"/> No | Received copy? <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| 4) Who prepares your proposals? | | _____ |
| You <input type="checkbox"/> (-1) Salespeople <input type="checkbox"/> (-1) Account Mgr <input type="checkbox"/> (-1) | | |
| Admin Staff <input type="checkbox"/> (1) Other <input type="checkbox"/> _____ | | |
| 5) What is the ideal sales cycle? | | |
| Less than 3 months <input type="checkbox"/> 3-6 months <input type="checkbox"/> More than 6 months <input type="checkbox"/> | | |
| 6) Do salespeople have ability to cut costs to obtain a sale? | <input type="checkbox"/> Yes <input type="checkbox"/> No | _____ |
| 7) Do they have parameters on how much they can discount? | <input type="checkbox"/> Yes <input type="checkbox"/> No | _____ |

SECTION 3 – Sales (Appointment Debriefing)

- 1) Do you have a post meeting debriefing list?

☐ Yes ☐ No
- a) Do you review this list after sales calls with new salespeople?

☐ Yes ☐ No
- 2) Do the sales managers review this?

☐ Yes ☐ No

SECTION 3 – Sales (Follow Up)

- 1) Do you have set form letters that you use to follow up meetings?

☐Yes ☐No
- 2) Do your salespeople use them consistently?

☐Yes ☐No
- 3) Do you have a system to track follow up?

☐Yes ☐No

SECTION 3 – Sales (Opportunity Tracking)

- 1) How often do you meet with salespeople to review the sales pipeline? _____
- 1x a Week ☐ (1) 1x every 2 weeks ☐ (0) 1x per month ☐ (-1)
- Rarely ☐ (-2) Never ☐ (-3)
- 2) Can you tell where each prospect you have is in the sales process?
- ☐ Yes ☐ No _____

SECTION 3 – Sales (Sale/Sold)

1) What is close ratio?

60%-70% ☐ 50%-60% ☐ 40%-50% ☐ 30%-40% ☐
20%-30% ☐ 10%-20% ☐ <10% ☐

2) How long does the salesperson stay involved after the sale?

1 month ☐ 1-3 months ☐ Longer than 3 months ☐

3) Is there a clear transition process from sales to service in your CRM?

☐ Yes ☐ No _____

a) If yes, describe that process:

4) How often is this transition process followed?

100% ☐ (+1) 50%-75% ☐ (-1) 25%-50% ☐ (-2) Rarely ☐ (-3)

5) Do you have a set welcome note/email that goes out to new customer?

☐ Yes ☐ No _____

Company Culture Questions

Owner questions (I struggle to grow my business because questions) can help market services.

Last Question

If you could improve one area for the next year, what would it be?

What would it mean to your business?

Briefly tell me why you think your previous attempt to hire and retain successful salespeople has fallen short of its goal?

Can we speak with you sales rep?

☐Yes ☐No

We will ask each rep to write down the sales process as they think it is.

Ask them if they can recite the company's:

- Anguish Questions
- Benefit Statement
- Prospecting Plan
- Objection and Answers to Overcome Them

Show them when we meet after the assessment how they should have a "Sales Playbook" with all the required scripts, letters, and forms needed for all sales calls. (Sandler)