

SALES EFFECTIVENESS SURVEY FOR BUSINESS OWNERS & MANAGERS

Please number each of the following statements on a scale from 1 through 5. Using the column on the left.

1= Not a Problem 2= Rarely a Problem 3= Frequent Problem 4= Serious Problem 5= Critical, Must Fix!

1-5	SKILLS
	Not getting in front of enough new prospects
	Not closing enough new business
	Margins are getting thinner - price pressure
	Wasting time with people who end up not doing business with us (not qualifying)
	Talking too much and not listening to the prospect
	Our people are not as consultative as I would like, they show up and dump product knowledge
	Not getting enough good high quality referrals
	Closing business, but it is not profitable enough for all the work it takes
	Not capturing our share of the business with some existing clients
	Frustrated by committee decisions that are huge timewasters for us
	Spending too much time with people that are not decision makers
	Not closing business fast enough- the sales cycle has gotten longer
	Inconsistent with our sales results
	Facing a lot more competition than we used to and we are no longer winning our share
	Being used for our information like price, creative ideas, demos, resources (free consulting)
Rank	STAFF
	Keep hiring salespeople who don't work out
	Can't figure out why some people are doing well and others aren't
	Don't know which salespeople we should stick with long term and who to cut
	Are not sure that we have the "right people in the right seats on the bus"
	The sales team doesn't seem motivated
	Must hire a better caliber salesperson to compete today, but don't know where to begin
	We hire technical people who know our business, but they're not effective at bringing in business
	Feel daunted by the thought of hiring a sales team that really can perform
	Have never managed a sales force before and uncomfortable or unsure of the best practices
	Hire good interviewers, but sometimes find that they are mediocre salespeople
	Would like to try to hire people outside of the industry, but can't afford costly mistakes
	Would be in real trouble if our #1 salesperson left
	Would be in real trouble if owner/sales manager stopped selling
	My best salespeople quit, but the mediocre ones stay around forever
Rank	STRUCTURE
	Don't have a way to effectively hold salespeople accountable
	Don't know if our compensation plan is helping or hurting our efforts to grow
	Wonder why our experienced sales force doesn't go after new business
	Haven't seen measurable improvements in the bottom line since we hired a sales manager
	When performance is suffering, we're not as effective at coaching our people as we should be
	We don't have an effective way to on-board new salespeople- it takes them too long to ramp up

	“Winging it” when it comes to sales, there is no repeatable sales process
	My people aren’t 100% sure of what selling activities are expected of them each day
	My people don’t have a prospecting plan that provides a mix of selling activities that drive business
	When I try to establish daily or weekly activity goals they feel like its “Big Brother” watching them
Rank	STRATEGY
	Don’t have a clearly defined “ideal client” profile that everyone agrees upon
	Are uncertain as to the right way to get in front of enough of those “ideal clients”
	We struggle to differentiate ourselves and “sound different” than the competition
	Deliver superior service/product to our customers, but aren’t getting superior price or margins
	Have too much revenue coming from too few accounts.
	Feel reactive to the industry and economy
	Have lost some key accounts and aren’t sure why
	Are getting the “low hanging fruit”, but can’t seem to crack the tougher ones that would be “ideal”
	Our customers could buy more types of products from us, but we struggle to expand the relationship
	We struggle to displace competitively held accounts

OTHER COMMENTS/ISSUES:

These issues are probably costing our company \$_____ per year.

Name: _____ Company: _____ Date: _____

Please call Bob at 504-835-1622 for a free consultation to discuss results and figure costs/ benefits and determine if some of your challenges are worth the investment to fix.

Simplest way to return the survey:

Word 2003: Select “File” then “Send As Attachment”

Word 2007: Click the “Office Button” in the upper left corner, Select “Send” then “E-mail”

Or fax to _____