



Document 16-07

Sales Audit Checklist

Date: ___ / ___ / ___ Coach: _____ Salesperson: _____

Feature	Function	Question	Notes	Addressed to:	P/I
Macro-Environment Organizational	1 Organizational skills have a direct impact on sales productivity.	Is the workstation/work area ... a) Organized efficiently? b) Data available? c) Sales collateral/aids organized and ready for use?	a) <input type="checkbox"/> Yes <input type="checkbox"/> No b) <input type="checkbox"/> Yes <input type="checkbox"/> No c) <input type="checkbox"/> Yes <input type="checkbox"/> No If no, observations: _____ _____ _____	Observe	(P) (I)
Macro-Environment Cultural	2 The representative's attitude towards the organization's products or services directly impacts his or her ability to position and sell the product or service to customers.	What is the representative's attitude toward the business and toward the company's products/services?	<input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor Describe: _____ _____ _____	Observe	(P) (I)
Macro-Environment Strategy	3 Sales strategies impact directly sales results.	What has been the representative's strategy via: a) Global Key Accounts? b) Influencers? c) Territory Key Accounts? d) Standard Accounts?	a) <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor b) <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor c) <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor d) <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor	Ask REP	(P) (I)

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Skills: Needs Questions	4 The proper use of needs questions can impact the development of great customer conversations.	a) Do you use needs questions to generate interest? b) Does the representative use needs questions in his or her sales conversations to generate interest? Curiosity?	a) <input type="checkbox"/> Yes <input type="checkbox"/> No Describe: _____ _____ _____ b) <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor Describe: _____ _____ _____	Ask REP Observe	P I
Skills: Reference Stories	5 Reference stories should be used to build trust and to position the organization's products and service.	a) Do you use reference stories in your sales conversations? When? b) Does the representative use reference stories during sales conversations?	a) <input type="checkbox"/> Yes <input type="checkbox"/> No Describe: _____ _____ _____ b) <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor Describe: _____ _____ _____	Ask REP Observe	P I
Skills: Territory	6 The sales representative should allocate his or her time correctly in the territory.	a) Do you allocate your time between Global Key Accounts, Influencers, Territory Key Accounts and Standard Accounts? How? b) Is the strategy (3) being followed?	a) <input type="checkbox"/> Yes <input type="checkbox"/> No Describe: _____ _____ _____ b) <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor Describe: _____ _____ _____	Ask REP Observe	P I

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Skills: Opening the Call	7 Opening the call is critical to avoiding call reluctance, to keep the balance of power equal, and to set the potential customer at ease.	a) Do you use a routine call opening? If so, what is it? Do you use a call outline? b) Does the representative use an effective call opening? Call outline? c) Verify decision maker? d) Identify himself/herself? e) State the "compelling reason to call"?	a) <input type="checkbox"/> Yes <input type="checkbox"/> No Describe: _____ _____ _____ b) <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor Describe: _____ _____ _____ c) <input type="checkbox"/> Yes <input type="checkbox"/> No d) <input type="checkbox"/> Yes <input type="checkbox"/> No e) <input type="checkbox"/> Yes <input type="checkbox"/> No	Ask REP Observe	(P) (I)
Skills: Probing for Active Needs General	8 Probing for active needs is necessary to qualify functions as benefits and to create the conversational sales presentation.	a) Do you probe for active needs? How? (Buying Committee, Risks, Timelines) b) Does the representative probe for active needs?	a) <input type="checkbox"/> Yes <input type="checkbox"/> No Describe: _____ _____ _____ b) <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor Describe: _____ _____ _____	Ask REP Observe	(P) (I)
Skills: Probing for Active Needs Budget	9 Budget is critical both to avoid investing unnecessary sales energy where an opportunity does not exist and to present solutions affordable for the potential customer.	a) Do you probe for budget? How? b) Does the representative ask about and pre-qualify the budget the potential customer has available?	a) <input type="checkbox"/> Yes <input type="checkbox"/> No Describe: _____ _____ _____ b) <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor Describe: _____ _____ _____	Ask REP Observe	(P) (I)

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Skills: Probing for Active Needs Buying Committee	10 Buying committee identification is critical because often decisions are made by more than just the representative's contact.	a) Do you probe for the buying committee? How? (If applicable) b) Does the representative ask about and pre-qualify the buying committee (If applicable)?	a) <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA Describe: _____ _____ _____ b) <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor <input type="checkbox"/> NA Describe: _____ _____ _____	Ask REP Observe	P I
Skills: Probing for Active Needs Risk	11 Risk identification and amelioration are critical to completing the sale.	a) Do you probe for risk? How? b) Does the representative ask about and deal with the potential customer's risk evaluation?	a) <input type="checkbox"/> Yes <input type="checkbox"/> No Describe: _____ _____ _____ b) <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor Describe: _____ _____ _____	Ask REP Observe	P I
Skills: Probing for Active Needs Identification of Needs	12 The identification of needs via probing for active needs is critical to qualify a solution provide for by the organization.	a) Do you probe for and qualify needs? How? b) Does the representative ask about and qualify the potential customer's needs?	a) <input type="checkbox"/> Yes <input type="checkbox"/> No Describe: _____ _____ _____ b) <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor Describe: _____ _____ _____	Ask REP Observe	P I

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Feature	Function	Question	Notes	Addressed to:	P/I
Skills: Probing for Active Needs Timeline	13 The representative must determine the potential buyer's timeline both for sales efficiency and sales effectiveness.	a) Do you determine the potential customer's timeline? How? What? b) Does the representative determine the potential customer's timeline?	a) <input type="checkbox"/> Yes <input type="checkbox"/> No Describe: _____ _____ _____ b) <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor Describe: _____ _____ _____	Ask REP Observe	(P) (I)
Skills: Call Conclusion	14 At the end of each call, the representative must have agreed with the customer on a "next step" from the probing for active needs process.	a) Do you propose a "next step" based upon your needs identification? How? What? b) Does the representative propose a logical "next step" based upon qualified active needs?	a) <input type="checkbox"/> Yes <input type="checkbox"/> No Describe: _____ _____ _____ b) <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor Describe: _____ _____ _____	Ask REP Observe	(P) (I)
Feature	Function	Question	Notes	Addressed to:	Skill Mod
Skills: Gatekeepers	15 Dealing with gatekeepers is a critical sales skill. (Gatekeepers often influence a decision maker.)	a) Do you deal with gatekeepers effectively? How? b) Does the representative deal with gatekeepers efficiently and effectively?	a) <input type="checkbox"/> Yes <input type="checkbox"/> No Describe: _____ _____ _____ b) <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor Describe: _____ _____ _____	Ask REP Observe	(P) (I)

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Feature	Function	Question	Notes	Addressed to:	Skill Mod
Skills: Cross-Selling Up-Selling	16 Cross-selling and up-selling are critical to help the customer buy and to provide the best solution to a potential customer's needs.	a) Do you cross-sell and up-sell? How? b) Does the representative effectively up-sell? c) Does the representative effectively cross-sell?	a) <input type="checkbox"/> Yes <input type="checkbox"/> No Describe: _____ _____ _____ b) <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor Describe: _____ _____ _____ c) <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor Describe: _____ _____ _____	Ask REP Observe	(P) (I)
Skills: Presentation	17 Presenting the product or service, in a conversational setting, is the primary method of educating the customer and getting the organization to the sales close.	a) Do you present our products or services as a solution to customer's needs? How? b) Does the representative effectively present our products or services? Time spent presenting:	a) <input type="checkbox"/> Yes <input type="checkbox"/> No Describe: _____ _____ _____ b) <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor Describe: _____ _____ _____ TIME <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Ask REP Observe	(P) (I)

Date: ___ / ___ / ___ Coach: _____ Salesperson: _____

Feature	Function	Question	Notes	Addressed to:	Skill Mod
<p>Skills: Objections</p>	<p>18 Dealing with objections is critical to helping the customer buy. ACT Method for Overcoming Objections</p>	<p>a) Do you deal with objections? How? b) Does the representative effectively acknowledge the objections? c) Does the representative effectively clarify? d) Does the representative effectively transition back to the sales process?</p>	<p>a) <input type="checkbox"/> Yes <input type="checkbox"/> No Describe: _____ _____ _____</p> <p>b) <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor Describe: _____ _____ _____</p> <p>c) <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor Describe: _____ _____ _____</p> <p>d) <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor Describe: _____ _____ _____</p>	<p>Ask REP</p> <p>Observe</p>	<p>(P)</p> <p>(I)</p>
<p>Skills: Closing</p>	<p>19 Closing effectively is the true mark of a successful and profitable salesperson.</p>	<p>a) Do you ask for the sale (close)? How? b) Does the sales representative effectively close the sale?</p>	<p>a) <input type="checkbox"/> Yes <input type="checkbox"/> No Describe: _____ _____ _____</p> <p>b) <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor Describe: _____ _____ _____</p>	<p>Ask REP</p> <p>Observe</p>	<p>(P)</p> <p>(I)</p>

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Skills: Trial Close	20 Using the trial close takes the pressure off both the buyer and seller.	a) Do you use a trial close? What is it? (It may vary.) b) Does the sales representative effectively use a trial close?	a) <input type="checkbox"/> Yes <input type="checkbox"/> No Describe: _____ _____ _____ b) <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor Describe: _____ _____ _____	Ask REP Observe	P I
Skills: Closing Statement	21 Closing statements are critical for sealing the deal.	a) Do you use a closing statement? What is it? (It may vary.) b) Does the sales representative effectively use a closing statement?	a) <input type="checkbox"/> Yes <input type="checkbox"/> No Describe: _____ _____ _____ b) <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor Describe: _____ _____ _____	Ask REP Observe	P I
Skills: Customer Advocate	22 Sales representative needs to be the customer's advocate inside the business, effectively balancing the needs of the selling organization and customer.	a) How do you represent the customer with others inside the organization? b) Does the sales representative serve as a customer advocate and balance the selling organization's needs, goals and objectives?	a) <input type="checkbox"/> Does <input type="checkbox"/> Does Not Describe: _____ _____ _____ b) <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor Describe: _____ _____ _____	Ask REP Observe	P I

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Feature	Function	Question	Notes	Addressed to:	Skill Mod
Skills: Opening the Call	23 The sales representative must make the call about the buyer and solving his/her business issues. It begins with opening the call.	a) Tell me how you typically open a call? b) How does the representative open the call?	a) <input type="checkbox"/> Yes, good opening <input type="checkbox"/> No, not about the buyer Describe: _____ _____ _____ b) <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor Describe: _____ _____ _____	Ask REP Observe	(P) (I)
Skills: Time Management	24 The sales representative uses his/her time wisely.	a) Tell me how you organize your day? b) Does the representative organize his/her day efficiently? Effectively?	a) <input type="checkbox"/> Yes <input type="checkbox"/> No Describe: _____ _____ _____ b) <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor Describe: _____ _____ _____	Ask REP Observe	(P) (I)
Skills: Tone of Voice	25 The representative uses tone of voice to engage the listener.	a) Does the representative effectively modulate his/her tone of voice to engage the customer?	a) <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor Describe: _____ _____ _____	Observe	(P) (I)
Skills: Voicemail	26 The appropriate use of voicemail is an excellent tool for the inside sales representative.	a) How to you use voicemail? When do you leave a voicemail? b) Does the representative use voicemail effectively?	a) <input type="checkbox"/> Yes, good technique <input type="checkbox"/> No, poor technique Describe: _____ _____ _____ b) <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor Describe: _____ _____ _____	Ask REP Observe	(P) (I)

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Feature	Function	Question	Notes	Addressed to:	Skill Mod
Activities	The activities in the Personal Business Plan define and document the expectations for the salesperson.	Activity Goal % of Goal	<input type="checkbox"/> Excellent +95% <input type="checkbox"/> Good +90% <input type="checkbox"/> Fair 85% <input type="checkbox"/> Poor -80%	Process Controls – Metrics from System	P
		Field sales calls per month			I
		Telephone sales calls per month	<input type="checkbox"/> Excellent +95% <input type="checkbox"/> Good +90% <input type="checkbox"/> Fair 85% <input type="checkbox"/> Poor -80%		P
					I
		Sponsored educational events per year	<input type="checkbox"/> Excellent +95% <input type="checkbox"/> Good +90% <input type="checkbox"/> Fair 85% <input type="checkbox"/> Poor -80%		P
					I
		Referrals generated and called per month	<input type="checkbox"/> Excellent +95% <input type="checkbox"/> Good +90% <input type="checkbox"/> Fair 85% <input type="checkbox"/> Poor -80%		P
		I			
		Targeted cold contacts per month	<input type="checkbox"/> Excellent +95% <input type="checkbox"/> Good +90% <input type="checkbox"/> Fair 85% <input type="checkbox"/> Poor -80%	P	
				I	
		Other: _____ _____	<input type="checkbox"/> Excellent +95% <input type="checkbox"/> Good +90% <input type="checkbox"/> Fair 85% <input type="checkbox"/> Poor -80%	P	
				I	
Revenue	The revenue required by the Personal Business Plan.	Provide details from order entry/accounting system.	<input type="checkbox"/> Excellent +95% <input type="checkbox"/> Good +90% <input type="checkbox"/> Fair 85% <input type="checkbox"/> Poor -80%		P
					I