

# Sales Development Audit Checklist

## Sales Processes

1. Monthly and/or Quarterly Targets are in place	<input type="checkbox"/> Needs Attention
2. Clear, shared understanding of what is an income-producing opportunity	<input type="checkbox"/> Needs Attention
3. Accurate forecasting mechanism	<input type="checkbox"/> Needs Attention
4. High effective Group & 1:1 Meeting Practices	<input type="checkbox"/> Needs Attention
5. Effective daily routines (use of time)	<input type="checkbox"/> Needs Attention
6. CRM used effectively / disciplined updating	<input type="checkbox"/> Needs Attention
7. Developing Target Account Plans	<input type="checkbox"/> Needs Attention
8. Territory Planning (where geographic area is covered)	<input type="checkbox"/> Needs Attention

## Opportunity Creation

1. Ideal Target Customer <i>Profile</i> defined / Selection criteria clear	<input type="checkbox"/> Needs Attention
2. Target Accounts / Prospect clearly identified & data available (TPL)	<input type="checkbox"/> Needs Attention
3. Value Proposition commonly understood and used	<input type="checkbox"/> Needs Attention
4. Conversation Entry language / messaging agreed	<input type="checkbox"/> Needs Attention
5. Able to secure prospect conversations	<input type="checkbox"/> Needs Attention
6. Able to handle pushback at early stage opportunity creation	<input type="checkbox"/> Needs Attention

## Opportunity Capture

1. Call / Meeting planning / preparation	<input type="checkbox"/> Needs Attention
2. Questioning / Discovery / Exploration	<input type="checkbox"/> Needs Attention
3. Managing the sales conversation roadmap / controlling the flow	<input type="checkbox"/> Needs Attention
4. Managing stakeholders (including different personas)	<input type="checkbox"/> Needs Attention
5. Bringing value through conversation / expertise / quality of advice	<input type="checkbox"/> Needs Attention
6. Developing Outlines and proposals	<input type="checkbox"/> Needs Attention
7. Handling pricing & Negotiation	<input type="checkbox"/> Needs Attention
8. Creating preference for the company's approach / offering	<input type="checkbox"/> Needs Attention
9. Securing key (hard) commitments including timeline commitments	<input type="checkbox"/> Needs Attention
10. Unearthing & dealing with obstacles (Asking hard questions)	<input type="checkbox"/> Needs Attention
11. Securing the next (scheduled) step / setting decision dates	<input type="checkbox"/> Needs Attention
12. Follow-through approach	<input type="checkbox"/> Needs Attention
13. Soft skills (listening / leading the conversation/empathy)	<input type="checkbox"/> Needs Attention

## Other

	<input type="checkbox"/> Needs Attention
	<input type="checkbox"/> Needs Attention
	<input type="checkbox"/> Needs Attention