

SALES TEAM ACCELERATOR

A Sales Diagnostic Tool
Presented by JeffBeals.com

INTRODUCTION

You are about to take the first step to a healthier, more productive sales culture! This assessment is not a comparison of competitors or of industry norms, rather its purpose is to help you assess your staff's strengths and weaknesses as well as determine those issues most relevant to your sales team at this time. This assessment is designed to help you focus and drive positive sales results without getting caught up in the minutiae and unnecessary complications of a scientific or academic survey. Here are three steps that will allow you to gain the most value from this Sales Team Accelerator:

- 1 | As you complete the assessment, look at your sales team from the standpoint of your middle and bottom producers. While your top performers can always improve, the greatest opportunity for moving the needle will be the middle performers followed by the bottom performers.
- 2 | Let each section of this assessment stand on its own, as each topic area will reveal specific truths about how important it is to your team's ability to improve their mindset and skillset.
- 3 | Use separate sheets of paper to take notes as you go through the survey. You will find that challenges and issues will arise in your mind as you think through each of these questions. The notes you write will help you develop the complete picture of where your sales team stands at this time and will help you prioritize your needed changes.

Scoring Scale: A score of 5 = High level of performance and/or competence; 1 = Needs a great deal of improvement. At the bottom of each tally grid, we provide guidance based on your team's scores.

I. PROSPECTING



Rarely are salespeople entirely honest about their prospecting habits. In fact, today's salespeople may be less honest about their habits than in the past because prospecting is harder today than ever. And while companies do a good job of teaching their sales reps the features and benefits of their products and solutions, they often fail to demonstrate how that training relates to prospective client value. The end result is that prospecting activity generally focuses on the company and not the prospect. Please rate your team according to the criteria below using the scale printed to the right.

Call Reluctance Issues

How proactive is your team in making prospecting calls? Is prospecting a top priority that happens every day or does it get buried in other distractions like email, customer service and paperwork?

1 2 3 4 5

Identifying and Prioritizing Prospective Targets

Does your team know who your ideal target is or are they simply approaching all prospects like equals? Does your team have a defined list of top targets?

1 2 3 4 5

Finding and Compiling Full Contact Information

If you were to spot check your sales team's contact info would you find a full profile or missing information?

1 2 3 4 5

Developing Compelling Language to Engage Client

If you were to put your sales team on the spot would they be able to wow you with a reason to engage? Do you feel their language choices are more compelling than your competitor's?

1 2 3 4 5

Self-Sourcing Leads

Is your team proactive in driving leads themselves or are they sitting and waiting for warm leads to be handed to them?

1 2 3 4 5

Understand Prospecting Quality vs. Quantity

Does your team understand that there are some leads that are better than others AND do they then do a good job of making them a priority with a solid plan to engage them?

1 2 3 4 5

Total Section Score =

Final Results Definition

30 - 25 They ROCK

24 - 19 Generally Encouraging

18 - 13 Serious Concerns to Address

12 - 6 LIFE SUPPORT

II. QUALIFYING



Too many sales teams spend endless hours talking to potential “buyers” who will never buy. Just because someone is willing to talk does not mean that will translate into a sale. If you want to expedite your sales process and have a significantly more efficient sales team, qualifying will play a significant role in that process. Please rate your team according to the criteria below using the scale printed to the right.

Ability to Qualify Based on Needs

How confident are you in your team’s ability to really qualify prospects? When they talk about opportunities are they willing to put it in your forecast?

1 2 3 4 5

Thought-Provoking Questions

Do you know what questions your team is using in the discovery process? Are the questions differentiating and are they thought-provoking?

1 2 3 4 5

Listening with Intention

Is your team REALLY listening to the prospect or do they have a set of predetermined questions from which they rarely deviate?

1 2 3 4 5

Identifying Stakeholders

Does your team consistently identify all of the stakeholders or do you find deals being lost because a different stakeholder(s) had more authority or more alignment with the required outcomes?

1 2 3 4 5

Outcome-Oriented Discussions

Does your team identify all of the required outcomes for each stakeholder and do they recognize that different stakeholders may have different requirements?

1 2 3 4 5

Total Section Score =

Final Results Definition

25 - 21 They ROCK

20 - 16 Generally Encouraging

15 - 11 Serious Concerns to Address

10 - 5 LIFE SUPPORT

III. SELLING



Selling is a culmination of many skills and activities. The selling environment is much more complex due to commoditization, as well as sellers all looking and sounding the same. The biggest asset your team can bring to the prospect is to create a level of value your competitors cannot bring! Please rate your team according to the criteria below using the scale printed to the right.

Business Acumen for Difficult Conversations

Does your team leverage a business acumen that establishes them as a thought leader and an industry expert delivering unparalleled value?

1 2 3 4 5

Creating Need for Change

How confident are you that your team is able to show prospects the reasons they need to change? Are they able to create doubt in alternative options or concern around the costs of not changing?

1 2 3 4 5

Providing Differentiating Value

How different does your sales team sound from your competitors? Are there defined differences in how they present vs everyone else in your market place?

1 2 3 4 5

Identifying Risks

Does your team actively identify and manage risks or are they simply focused on what is working well? If you asked your team on the spot could they tell you what the risks are?

1 2 3 4 5

Converting Qualified Leads

Is your team strong at converting leads or do you find more leads go to the wasteland of lost deals?

1 2 3 4 5

Leveraging Next Steps

If you were to review all opportunities, would there be a defined set of next steps or would it be vague steps of simply calling back to check on progress?

1 2 3 4 5

Total Section Score =

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18 - 13 Serious Concerns to Address

12 - 6 LIFE SUPPORT

IV. CLOSING



For a long time, sales teams have looked at closing as a step in the sales process. The truth is closing is a series of steps that happen throughout the entire process with some taking place towards the end. The better your sales team can address each of these steps the higher their closing rate will be. Please rate your team according to the criteria below using the scale printed to the right.

Negotiating with Purpose

Is your team proactively keeping the clients' outcomes in mind or are they negotiating the deal to close at all cost.

1 2 3 4 5

Maximizing Profit

Does your team tend to discount as an early step to close the deal? Do they have a mindset of discounting to close the deal at all cost?

1 2 3 4 5

Dealing with Budget Issues

Does your team negotiate from a stance of if a discount is requested then the customer is requested to give up something in return? Do they work from a stance of quid pro quo?

1 2 3 4 5

Relating to Outcomes

Does your team relate the investment to the prospects' desired outcomes or are they focused on what they will give up to close the deal?

1 2 3 4 5

Total Section Score =

Final Results Definition

20 - 17 They ROCK

16 - 13 Generally Encouraging

12 - 9 Serious Concerns to Address

8 - 4 LIFE SUPPORT

V. NURTURING



Nurturing is one of the best opportunities to create a predictable pipeline. The biggest challenge is being able to identify those clients who you need to spend more time with and be more personable with vs those you want to just stay in front of. Nurturing is not just about what you do but also how you do it. The list below contains some of the key elements in a successful nurturing process which you can compare your team's efforts to. Please rate your team according to the criteria below using the scale printed to the right.

Educating & Informing

How well does your team do in educating your prospects, not about your product but your expertise, changes in the industry, insights they might not know about? Are they acting like a thought leader or a vendor?

1 2 3 4 5

Nurturing Process

How often is your team touching potential clients? Is it a haphazard process or is it a rhythmic process where your prospects are being fed valuable information.

1 2 3 4 5

Resonating Language

Is your team using your internal language or business acumen? Do they sound like industry experts or are they simply spitting out features and benefits?

1 2 3 4 5

Tracking Activity

How well does your team do in tracking each touch to the prospect? Do they know when they last touched them and what the last touch was about?

1 2 3 4 5

Total Section Score =

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VI. SALES LEADERSHIP COACHING & DEVELOPMENT

Companies undervalue and underutilize the most valuable asset in the organization – your sales leadership. If you want to expedite sales and close deals at higher margins, then it will require your sales leadership to engage in a meaningful way, rather than just overseeing the numbers. Prospecting, closing, and nurturing will dramatically increase when your sales leadership interacts strategically in the development of your sales team. Please rate your team according to the criteria below using the scale printed to the right.

Sales Accountability

How well do you or your leadership team hold sales accountable for the activities and outcomes they produce? Would your sales team be able to tell you the specifics of what they need to be accountable for beyond their quota?

1 2 3 4 5

Expectation Follow-Through and Monitoring

Have you and/or your sales leadership set clear expectations and are those expectations monitored on a weekly basis?

1 2 3 4 5

Sales Team Development in Sales Meetings

Are your sales meetings valuable to your team or are they simply a deal review? Would your sales team say they are better off from a skill set and mindset than before the meeting?

1 2 3 4 5

Motivation

Is your team regularly motivated by yourself and/or your sales leadership? Would your sales team say they feel supported and motivated to do the right things?

1 2 3 4 5

Coaching Support

Do you and/or your sales leadership provide teaching moments when coaching a deal to encourage the salesperson to learn and grow from both successes and lost deals, or does leadership jump in and actively close the sale to save the sale?

1 2 3 4 5

Measuring and Monitoring Meaningful Sales Activity

Have you defined the specific set of metrics that you monitor weekly? Are those metrics shared with the sales team and are they discussed with the sales team weekly?

1 2 3 4 5

Sales Cadence and Triggers

Do you have a documented sales process, of which each salesperson knows the specific stages, which clearly define that the sale is moving forward? Would your sales team say there are defined stages or would they say it's more of a gut check on whether or not the prospect will close?

1 2 3 4 5



Sales Rep Individual Development

Would your sales team say they receive the support they need to continually improve their performance? Can you specifically point to how they are improving on a regular basis?

1 2 3 4 5

Total Section Score =

Final Results Definition

40 - 32 They ROCK

31 - 23 Generally Encouraging

22 - 14 Serious Concerns to Address

13 - 8 LIFE SUPPORT

CONCLUSION



Now that you have completed the assessment, it's time to determine what the results mean to you and your sales team. We use this assessment with each of the companies we advise to help them identify strengths and weaknesses and then design a program for improving sales performance. You can use the assessment for the same purpose in your own sales department.

Go back and review your results, contemplating what they really say about your team's performance. What are your strongest categories? Which are your weakest categories? Also be sure to review the notes you took about each category. Generally speaking, we recommend you focus on one to two areas that most need improvement. Depending on your company's structure and internal political dynamics, you may want to study the results with key colleagues.

You are welcome to discuss the results with us at JeffBeals.com. You don't have to have a consulting agreement with us in order to discuss your results and ask questions.

A successful sales team is just like any other kind of team in that it requires a purpose, strategic vision, leadership, buy-in from team members, an organizational system and daily execution. It is our hope that this assessment helps you move your sales team forward.