

# WORKSHEET TO DEVELOP A STELLAR SALES MANAGEMENT PROCESS



For each major area of sales management responsibility, address the following questions and use what you learn to create your sales management process.

1. SALES STRATEGY	
<b>A. SALES PIPELINE GOALS</b>	
1. How many leads daily/weekly/monthly/quarterly/yearly?	
2. How many qualified leads daily/weekly/monthly/quarterly/yearly?	
3. Targeted conversion rate	
4. How many calls daily/weekly/monthly/quarterly/yearly?	
5. How many appointments daily/weekly/monthly/quarterly/yearly?	
6. Number of closed sales in units and dollars daily/weekly/monthly/quarterly/yearly?	

B. SALES CYCLE	
1. Time from lead to qualified lead	
ACTUAL	GOAL

2. Time from qualified lead to appointment set

**ACTUAL**

**GOAL**

3. Time from first contact to close

**ACTUAL**

**GOAL**

4. Average number of contacts required to close

**ACTUAL**

**GOAL**

5. Total sales cycle time

**ACTUAL**

**GOAL**

**C. What are my sales strategies to acquire new customers?**

**D. How can we improve lead generation?**

**E. Where are our weaknesses vs the competition?**

**F. What are our biggest objections from potential customers and how can we counter them?**

**G. What are current customers major complaints and how can escalate resolution?**

## 2. SALES ANALYSIS

**A. Where are our sales efforts strongest?**

**B. Where are they weakest?**

**C. What products perform best?**

**D. Where are our greatest missed opportunities?**

**E. What do I forecast our sales will be for the month, quarter, year?**

**F. What would a stretch goal be?**

**G. What are our most important KPIs?**

**H. What are the KPI trends telling us?**

### 3. SALES PEOPLE

**A. What should the quotas be for individual sales reps?**

**B. What is the incentive compensation plan?**

**C. How often will I meet with each rep one on one?**

**D. How often will I do individual training?**

**E. How often will I do full performance reviews?**

**F. How often will we meet as a team?**

**G. Develop a plan for ongoing training for reps.**

**H. What is my plan for dealing with underperforming reps?**

**I. Are reps making best use of technology?**

**J. What am I doing to promote team building?**

**4. SALES OPERATION**

**A. What is the budget process?**

**B. Is our sales administration in order?**

**C. Do we have the content that we need to demonstrate our value to customers?  
If not, how will we develop it?**

**D. What sales model will we use?**

**E. Will we assign sales reps to specialized roles such as lead generation, advanced negotiation, major accounts?**

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