

# Modern Sales Assessment



# Business Information

- How long have you been in business?
- What makes your company unique?
- Why would someone buy from you vs your competition?
- What do you offer that your competitors can't?
- Do you have business growth expansion plans? (new products, new locations, etc.)
- What are your main revenue sources?
- What is your current revenue?
- Who is responsible for sales in your company?
- How many hours a week do they spend on it?
- How do you pay your salespeople?
- How do you forecast sales?
- What kind of sales reporting do you use?
- What sales capacity are you running at now?
- What is the max sales capacity of your business?
- How many active customers do you have?
- How many inactive customers do you have?
- How often do your customers purchase?
- What is the average number of new customers per month?
- What is the average number of repeat customers per month?
- What is the average spend per new customer?
- What is the average spend per repeat customer?
- Do you know your customer acquisition cost?

# Sales Process

- Do you have a sales process?
- What are your current sales processes or practices?
- How long is the sales cycle?
- What is your close rate?
- Do you have a renewal process? If yes, what it is?
- Does your website model the sales process?
- Have you ever tried other sales processes?
- How do you get new customers?
- Where do they come? How do you identify them?
- How do you know when someone is ready to buy?
- How do you connect with ready buyers?
- How do you move buyers through the sales process?
- How do you nurture potential buyers?
- How do you follow-up with buyers that just aren't ready yet?
- How do you follow-up with old customers who have not made a recent purchase?
- Is there part of the sales process that is repetitive?
- What tasks would you like to eliminate?
- What process would you like to automate?
- Have you ever asked your customers about your sales process?
- What do you like and dislike about your current sales process?
- What happens if you don't fix your dislikes?

# Sales Strategies and Software

- What software do you use?
- What client management software (CRM) do you use to manage client data?
- If no CRM software, what process do you use? (ex: excel, paper, etc.)
- What information do you capture? Why do you capture it?
- What other data would be useful for you to capture?
- How much time do you spend on this?
- What are your client data management costs?
- What do like and dislike about your current processes or practices for capturing data?
- Can your contact database easily create lists?
- What can you filter and sort by? (ex: buyer stage, last contact date, last purchase, etc.)
- Do the list update automatically?
- If using a manual process, describe the process?
- Are your list available in csv, excel or pdf format?
- What do you like and dislike about your current process for creating lists?
- How do you track buyers vs. non-buyers?
- Do you use customer lifecycle stages to classify contacts? (ex: lead, prospect, opportunity, or customer)
- Do you track lead sources? (ex: website, cold call, walk-in, etc.)
- What method do you use for client follow-ups and tasks?
- What sales activities do you do with your customer data? (ex: email phone, etc.)
- What customer success activities do you do with your customer data?
- Do you have a revenue forecasting method you use?
- What kind of reporting do you get?
- How much time do you spend on this?
- How much money do you spend on this?
- Have you tried anything else?
- What happens if you don't fix your dislikes?

# Sales Goals

- What are your growth goals? (expansion, new products, etc)
- What are your sales revenue goals?
- What are your sales revenue growth goals by source? (new vs. repeat)
- What are your sales goals? (close rate, increase average order size, etc)
- What are your cost goals?
- What are your time management goals?
- What are your reporting goals?
- Have you ever considered sales training, sales coaching or sales management solutions?

# S.W.O.T. Analysis

# STRENGTHS

SWOT

## STRENGTHS

What you can build upon?

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# WEAKNESSES

SWOT

## WEAKNESSES

What needs to be addressed?

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# OPPORTUNITIES

SWOT

## OPPORTUNITIES

Quick wins and growth

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# THREATS

SWoT

## THREATS

The cost of inaction

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# WHAT NEEDS TO BE ADDRESSED

Needs

## Questions that need to be answered?

More information needed to move forward

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### Quick Wins

Things that can make an immediate impact

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# TRAINING RECOMMENDATIONS

Training

## TRAINING

What courses you should take?

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# NEXT STEPS SUSTAINABLE GROWTH

Next  
Steps

## NEXT STEPS

What does implementation look like?

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