



# SALES AUTOMATION READINESS ASSESSMENT

The journey to develop a sales and marketing automation strategy is unique to the needs of each individual business, and when properly implemented can lead to higher levels of customer satisfaction, a highly efficient sales team and increased sales velocity with minimal waste that can drive up opportunity cost.

**LET KALLAN HELP YOU IN THAT JOURNEY!**

Contact us today to implement the plan that will drive the key components required to accelerate your sales growth goals.



## 1 DEFINE YOUR AUDIENCE

Start with your most profitable customers to understand why you are successful there. Then, identify the key roles to develop your personas around.

## 2

### UNDERSTAND THE BUYING PROCESS

Start with understanding how your current customers make purchasing decisions. Learn factors like where they research information, what media they prefer it in and what criteria must be met to gain purchasing approval.



### UNDERSTAND YOUR SALES CYCLE

## 3

Clearly identify your sales cycle to outline the steps required within your organization to collect data, develop solutions and create proposals that will close deals.



## 4

### EVALUATE HOW YOU MANAGE DATA

Evaluate what your business is doing to organize and manage data