

# How Tight Is Your Sales Process Quiz

*A quick quiz to help you assess how tight your sales process is:  
Brutal honesty for best results ;)*

## 1. How often do you miss calls?

- a. Never, I answer the phone even when I probably shouldn't.
- b. A few a month
- c. A few times a week
- d. Everyday

## 2. How quickly do you call people back when they call?

- a. Within a few minutes
- b. Within an hour
- c. Within 1 day
- d. Within a week

## 3. How are you notified of contact forms filled out on your website?

- a. Text Alerts
- b. Text and Email
- c. Email
- d. I'm not sure

## 4. How do you manage your leads?

- a. A CRM system that multiple teammates also use.
- b. A CRM system only the sales person uses.
- c. Spreadsheets that are sometimes shared with the team.
- d. Emails, texts and calls, sticky notes or a notebook.

## 5. How easy is it for a teammate to work your leads?

- a. Easy, I use a CRM daily and leave lots of notes in the contacts.
- b. Ok, I use a CRM, but I'm a bit behind on keeping it up to date.

- c. Hard, I use a spreadsheet to track leads, but there are no notes for context
- d. Impossible, I keep track of leads in my head and use my personal email and phone to correspond with leads.

**6. When do you work your sales leads?**

- a. All day everyday
- b. For an hour in the morning, and an hour at the end of the day
- c. For an hour before the end of the day
- d. When I have time, I'm very busy!

**7. How often do you set next steps with leads?**

- a. Every time, I give every lead my all.
- b. Sometimes, if they are really friendly, I feel comfortable reaching out.
- c. Rarely, if they don't express a lot of interest in signing up right away, I don't chase them.
- d. Never, I wait for people to get back to me.

**8. Do you have compelling signing incentives and limited-time special offers?**

- a. Yes! I have both great signing incentives and limited-time special offers.
- b. Good, have an ok signing bonus.
- c. Ok, I offer to waive sign-up fees.
- d. No, I have neither.

**9. Who works with the owner leads at your company?**

- a. We have trained appointment setters on the frontlines and a full-time sales rep or closer.
- b. We have a dedicated sales rep
- c. The owner of the company
- d. Whoever on the team has bandwidth at the moment.

**10. How important is it to improve your sales process?**

- a. Super Important
- b. Important
- c. Somewhat Important
- d. Not Important

## **Total up how many A's, B's, C's, and D's.**

A's = 10 points

B's = 8 points

C's = 5 points

D's = 1 points

80 - 100 - Points - Rock Solid!

60 - 79 - Points - Room for Improvement

59 - 40 - Points - Needs Help!

39 - 10 - Points - What Process?

Now that you have a better understanding of where to start tightening your sales process, make a plan.

What steps do you need to take to address the issues you've identified?

Demo a few CRMs? Start learning more about how to better work within the CRM you have.

Design a better sales process? Get disciplined about working leads?

Finally, hire that sales rep or fractional business development rep?

Invest in sales coaching to take your skills and process to the next level?

**Stop missing out on deals that you could be signing!**

Reach out to me for a free consultation on sales coaching, using a CRM for faster follow-up, and so much more!

[jade@jadewolffconsulting.com](mailto:jade@jadewolffconsulting.com)

I'm Here For You!

