



*Accelerating Growth and Driving Performance!
Does This Describe Your Sales Performance?*

This Sales Effectiveness assessment is one component of an overall assessment of your organization’s sales performance. It is by no means a complete picture of your sales organization. It is intended to quickly highlight areas where attention would be desirable and to encourage you to take a more in-depth, thoughtful examination of your entire sales organization. Each section assesses a different aspect of your sales effectiveness. When conducting a formal assessment, Catalytic Management combines a complete written assessment with staff interviews and skills testing to give our clients a 360° view of their organization. Recommendations and an implementation plan are also part of a complete assessment.

Sales Assessment Directions

Please read each statement carefully and with your organization in mind, place the number in the left column that best fits with your level of agreement with each statement.

Scale:

Disagree					Agree
1	2	3	4		5

Financial Performance

- _____ Your sales professionals understand important sales metrics and how they affect the organization’s bottom line
- _____ Your sales professionals create accurate sales forecasts
- _____ Your sales professionals understand the importance of a sales pipeline and maintain an accurate individual pipeline
- _____ Your organization’s pipeline is sufficiently full to meet near and long-term goals
- _____ Your sales professionals understand key financial ratios and how they impact the company when qualifying a prospect
- _____ All of your sales professionals understand and follow the organization’s client billing and credit policies
- _____ All of your sales professionals understand the organization’s pricing strategy and its impact on margins
- _____ Revenue is growing and meeting or exceeding expectations

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Sales Effectiveness Assessment

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Competency and Skills Needs

- _____ The organization has a process in place to identify specific performance gaps of your sales professionals
- _____ The organization understands the most difficult challenges faced by your sales professionals
- _____ The organization has identified specific competencies to ensure success in a sales role
- _____ Competencies required for success in your organization are included in new hire interviews, performance measurements and in compensation
- _____ Training for sales professionals is on going and updated regularly to adjust to changing market forces
- _____ Your sales organization identifies and assigns responsibilities for in-house mentoring
- _____ Your sales professionals always exhibit high standards of professionalism
- _____ Your organization aligns individual sales development plans with the organization's strategic business objectives incorporating an effective sales scorecard
- _____ Your organization supports planned efforts to develop the talent of sales professionals

Selling Skills

- _____ Sales professionals understand the different buying styles and how to effectively communicate one-on-one with each style
- _____ Sales professionals at your organization realistically assess their own strengths, weakness and impact on others
- _____ Your sales team actively uses current technology (i.e. Social Media) to prospect and network
- _____ Sales professionals accept job ambiguity and establish positive techniques for handling rejection
- _____ Sales professionals are skilled at planning, scripting and calling potential new clients
- _____ Sales professionals are effective at initiating and sustaining client relationships
- _____ All of your sales professionals are effective at writing clear, concise proposals/bids
- _____ All of your sales professionals make clear and effective oral presentations to clients/groups
- _____ All of your sales professionals understand and practice strategic account management
- _____ All of your sales professionals understand their customer's needs and provide solutions to meet those needs and build true "partnerships"
- _____ Customer feedback and input are core components of all product and service evaluations

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Sales Effectiveness Assessment

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Managing Client Communications

- _____ Your organization adequately maintains regular and ongoing planned client communication
- _____ Individual sales professionals maintain client data profiles, follow-up logs, and input critical data into client database
- _____ Your organization has invested in client management technology that will track customer relationships and marketing campaigns
- _____ Individual sales professionals respond to clients in a timely manner and provide appropriate follow up
- _____ Sales professionals regularly conduct account reviews and share results with appropriate departments to ensure client satisfaction
- _____ Client feedback and input are core components of all product and service evaluations
- _____ Sales professionals plan and utilize specific social activities and events to enhance client relationships
- _____ Your sales professionals appropriately communicate changes in policies and procedures that affect clients

Negotiation and Power

- _____ When appropriate, your sales professionals take advantage of business opportunities to negotiate
- _____ Sales professionals understand the different types of buyers and what drives buying decisions
- _____ Sales professionals understand and practice the concepts of effective negotiation
- _____ Sales professionals understand how to structure a planned negotiation
- _____ Sales professionals demonstrate their knowledge of the types of power and how to influence others by effectively closing business
- _____ Sales professionals understand the difference between negotiation and mediation
- _____ Sales professionals understand the importance of controlling emotions and their impact on negotiation
- _____ The organization offers programs to enhance and practice negotiating skills

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Competitive Knowledge

- ___ All of your sales professional stay up to date on industry trends
- ___ Your organization regularly solicits competitive information
- ___ Your organization enforces its policy on ethical behavior regarding collecting competitive intelligence
- ___ Your organization offers a formal method to capture and maintain competitor intelligence
- ___ Your entire organization understands the importance of confidential information and works to keep such information from becoming public
- ___ All of your sales professionals know how to conduct market research
- ___ Your sales and marketing departments regularly share market information
- ___ All of your sales professionals can effectively present your product and services benefits against those of the competition

Servicing the Client

- ___ Your entire organization is focused on creating positive client interactions
- ___ Sales presentations are focused on uncovering client needs first
- ___ Your organization has a formal client conflict resolution process
- ___ Sales professionals routinely set client expectations through the use of tools such as Service Level Agreements
- ___ Your entire organization understands their individual responsibility and decision-making authority when resolving client issues
- ___ Your organization has established service standards and measurements
- ___ Client service is included in performance measurements and compensation
- ___ Delivering superior service is a core business goal

Scoring & Results on Next Page



How Effective is Your Sales Organization?

The key to the sample assessment is below. Add up your total responses to determine your organization's score.

- | | |
|---------|---|
| 276-300 | Congratulations! Your organization demonstrates a highly effective sales effort |
| 228-275 | Good job. You have probably experienced real success and believe that continuous improvement drive results |
| 180-227 | Performance improvement is recommended. |
| 0-179 | Problems exist within your sales organization. Undertaking a comprehensive performance improvement program is highly recommended. |

Thank you for visiting Catalytic Management's website. We hope you found this tool useful in uncovering your strengths and challenges. If you would like to discuss your findings and how Catalytic Management can help you address your challenges and drive revenue, please contact us at:

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