Assess, Prioritize, Act

Sales Management

- Sales plan
- Targets / quotas
- Budget
- Pipeline and forecasting
- Staffing and recruiting
- Productivity goals
- Coaching skills
- Performance appraisals
- Compensation plan
- Job descriptions
- New hire orientation
- Special incentives
- Internal communication

Sales Team / Individuals

- Department structure
- Roles / titles
- Territory configuration
- Strengths / talents / competencies
- Weaknesses / challenges
- Individual personalities
- Group culture
- Reporting / pipeline / forecasting
- New reps
- Underperformers
- Superstars

Assess, Prioritize, Act



Company goals
Market conditions
Industry drivers
Product portfolio

Revenue (last 5 years)
Growth plan (next 3 years)
Competitive landscape

Customer and Sales Data Accounts
Top
Increasing, decreasing, steady
Vulnerable
Competitor

Sales revenue by:
Existing vs new business
Geography / vertical industry
Customer size
Product
Sales representative

Resources,
Processes
and Systems

Contacts / leads / lists
Presentation material
Brochures (e- and paper)
Social media

Salesforce automation
Website
Industry data
Sales process / methodology

Sales Management Framework

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