

Sales Excellence Review Tool

Why you need it: use this review tool to review your Sales Excellence performance and identify actions

Project time

1 day

Level

Intermediate

Audience



**Sales
Leader**

Benefit

**Practical
Guidance**

About this guide

- A useful tool to review your sales excellence performance habit by habit
- Use each page to map out key actions and agree priority level

Tips for success

- Be honest
- Prioritise – use the page at the back to identify no more than 3 key actions

What you'll get out of it

- A clear understanding of where you are on your Sales Excellence journey and the actions you need to take to progress
- Clearly defined short-term actions

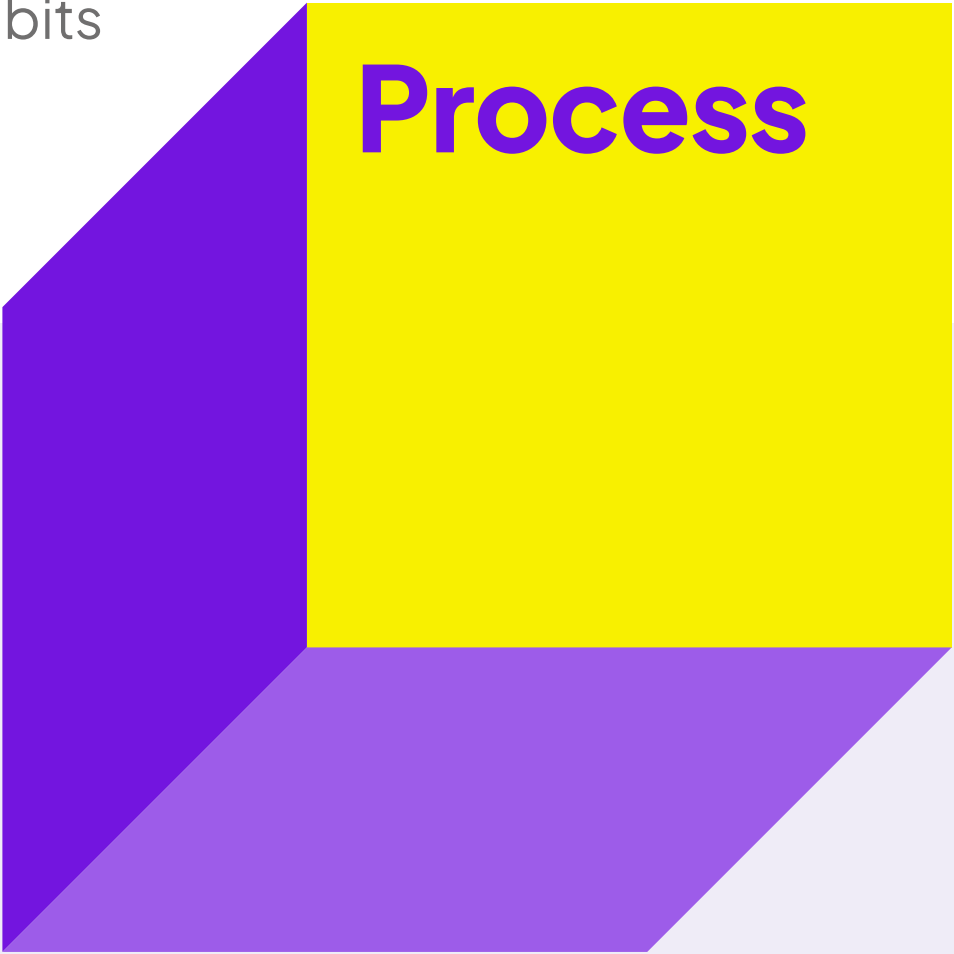
Useful links

- [Process Overview](#)
- [People Overview](#)
- [Execution Overview](#)
- [Sales Excellence](#)
- [Sales Excellence toolkit](#)

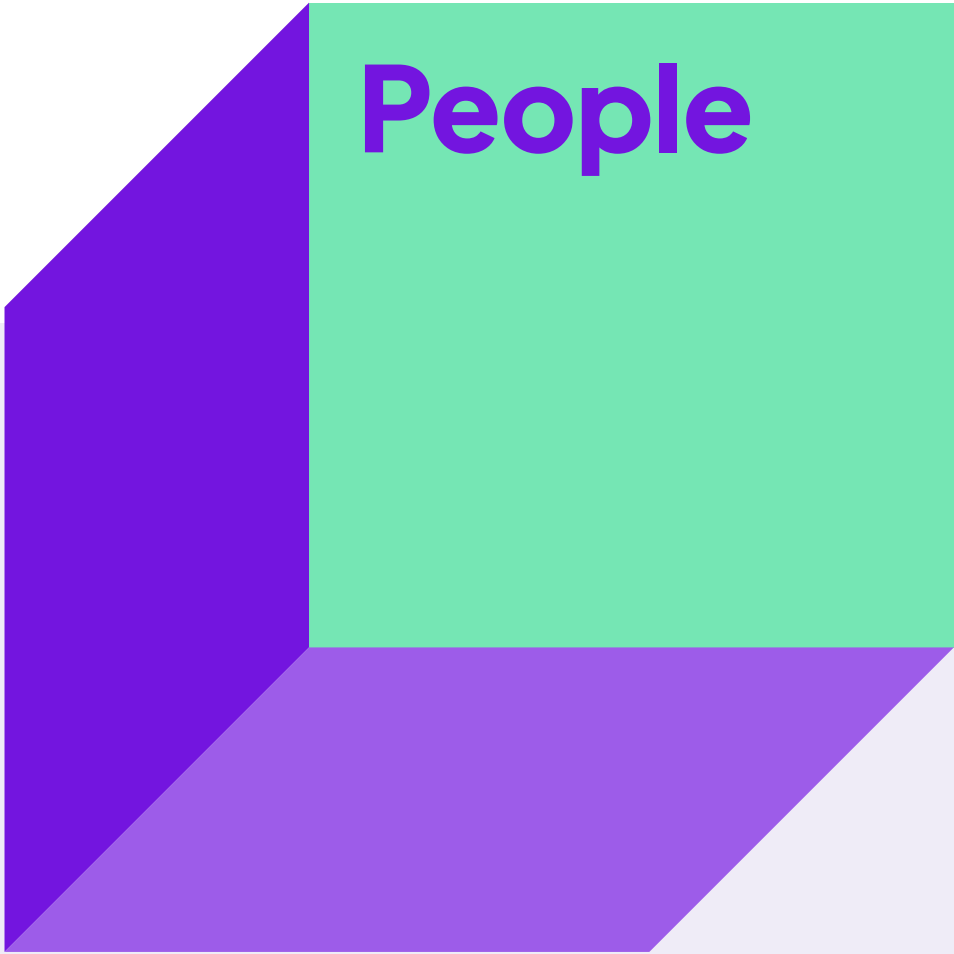
Sales Excellence

Sales Excellence focuses on three key topics - Process, People and Execution.

We have used our research to develop a number of 'winning habits' for each topic. These winning habits offer best practice and actionable guidance.



- 1 Market & Customer Targeting
- 2 Sales Process



- 3 Right Leader
- 4 Structure
- 5 Capability
- 6 Incentives
- 7 Culture



- 8 Funnel & Pipeline Management
- 9 KPIs
- 10 Performance Routines



Market & Customer Segmentation

In summary: What we want to sell to whom

- Priority check:
- ☐ High Priority
 - ☐ Medium Priority
 - ☐ Low Priority

Success looks like:

- **Good process:** how have you approached market & customer segmentation?
- **In-depth analysis:** have you thoroughly analysed your markets (existing & new) and customers? Have you identified customer personas and how you can match your value proposition to customer pains & gains?
- **Prioritisation:** based on potential, have you effectively prioritised your markets & customers and a plan for action?

Relections

- Review your recent segmentation research. What inputs have you used? What are the themes?
- How have you quantified the potential of the market segments?
- How have you identified your priority markets?
- How have you tailored your value proposition to the customer personas (pains & gains)?

Agreed actions

Comments



Sales Process

In summary: Design & implement a sales process with magic touches

- Priority check:
- ☐ High Priority
 - ☐ Medium Priority
 - ☐ Low Priority

Success looks like:

- **Designed & defined:**
 - Is specific to your business, markets & customers
 - Considers entire business
 - Includes channel, lead gen & prospecting, sales engagement, price, fulfilment, account management & nurturing
 - Is constantly being reviewed and improved
 - If tech is used it must be an enabler and not a fix for poor process
- **Magic touches:** deliberate and consistent actions built into the process that demonstrate we can deliver what the customer needs.

Relections

- Where is the most friction in your Sales Process? Why? What actions are you taking to reduce it?
- Where is your process working best & why?
- What adjustments will you be making to your Sales Process and how will they drive sales?
- What are the magic touches that ensure you get the sale?

Agreed actions

Comments

Structure

In summary: Structure (i.e. defining roles and how they fit together) allows us to deliver across entire sales process

Priority check:

☐ High Priority

☐ Medium Priority

☐ Low Priority

Success looks like:

- **Right structure:** creates clarity & focus; enables hunting & farming; aligns to sales channels; and delivers across entire sales process from lead generation to closing deals to growing accounts
- **Identify gap:** what is the gap between current & target structure (roles, responsibilities, time spent)
- **Approach:** will this require evolution or restructuring (or a combination)

Relections

- How is your current sales structure driving/ supporting growth?
- What changes are needed to your sales structure? When do you plan to make them?
- How are you balancing hunting and farming and what measures have you taken to ensure that the balance is correct in practice?
- How does your structure support your sales channels?
- As you scale where will you need to change structure – what are the next 5 roles you plan to invest in?

Agreed actions

Comments



Capability

Do you have the right skills and attitude for the long term?

- Priority check:
- ☐ High Priority
 - ☐ Medium Priority
 - ☐ Low Priority

Success looks like:

- **Diagnosis:** how have you identified capability gaps? Are you considering capability across the entire sales process from lead generation to closing deals to growing accounts?
- **Hiring capability:** When you hire, do you consider attitude/culture as well as knowledge and skills?
- **Training capability:** do you have a thoughtful plan for training and induction?
- **Developing capability:** do you coach your salespeople?
- **Retention capability:** is there a plan?
- **Performance management:** is it actively managed? Can you make difficult decisions when performance short?

Relections

- You can hire in capability or build it in-house - what is your balance?
- Do you have a sales training plan (beyond technical training)?
- How will you build capability (next 6 months)?
- How are you coaching/developing capability?
- What plans do you have to address performance issues?

Agreed actions

Comments



Incentives

In summary: Incentives align interests and ignite your sales team

Priority check:

- ☐ High Priority
- ☐ Medium Priority
- ☐ Low Priority

Success looks like:

- **Simple:** do your salespeople understand their incentives/bonus and the actions they need to take to get full reward?
- **Bold:** are the incentives bold enough to drive competitive behaviours (beyond market norms!)
- **Aligned:** have you identified the behaviours needed to exceed sales goals? Are incentive plans aligned to sales goals by reinforcing behaviours?

Relections

- What sales behaviours are your incentives designed to drive? How effective are they at this?
- Do your salespeople know which actions they need to take to achieve maximum reward?
- What have you done to ensure your incentives go beyond the market norm?
- How do you communicate with your sales team about whether they are on track to hit their incentives?

Agreed actions

Comments



Culture

In summary: Proud to be a sales organisation

- Priority check:
- ☐ High Priority
 - ☐ Medium Priority
 - ☐ Low Priority

Success looks like:

- **Demonstrable action:** have you taken actions to drive and sustain sales culture across the organisation (including onboarding)?
- **Engagement:** is this reflected in your engagement survey scores e.g. interdepartmental comms, communication of company vision, leadership communication, customer?
- **Celebration!** does the business have a culture of celebrating success?

Relections

- What are three demonstrable ways that you are driving sales culture across your organisation?
- Are the sales team individually and collectively ambitious?
- Is there a winning sales culture across the entire organisation?

Agreed actions

Comments

Funnel & Pipeline Management

In summary: Driving sales activity and outcomes across the entire Sales Process from lead generation to sales engagement to fulfilment to nurturing and growing accounts

Priority check:

☐

High Priority

☐

Medium Priority

☐

Low Priority

Success looks like:

- **Useful:** is reporting, data and documentation up to date and accessible. Is it integrated into performance routines? Is it regularly referenced and accessible?
- **Effective:** is the information honest & realistic? Is it driving the right, focused action?

Relections

- Where do you need to improve the funnel? What size does funnel need to be and what conversion is needed to deliver on ambition?
- How is the pipeline being used to move customers from interest to action and to prioritise sales actions? What size does pipeline need to be to deliver sales ambition?
- How are sales funnel/pipeline being used to drive sales momentum and prioritise activity?

Agreed actions

Comments



KPIs

In summary: A sales dashboard on leading indicators

- Priority check:
- ☐ High Priority
 - ☐ Medium Priority
 - ☐ Low Priority

Success looks like:

- **Dashboard:** dashboard is used; KPIs are leading and outcome-focused; KPIs are closely linked to outcome

Relections

- Why have you chosen these KPIs and how do they drive action?
- How often do you look at sales dashboard?

Agreed actions

Comments



Performance Routines

In summary: Performance routines drive consistency

- Priority check:
- ☐ High Priority
 - ☐ Medium Priority
 - ☐ Low Priority

Relections

- **Balance:** performance routines are:
 - Structured but not bureaucratic
 - Consistent and effective
- **Action orientated:** performance routines are agile, dynamic and prioritise sales actions

Sample Questions

- What performance routines do you practice at each level of sales?
- How do you ensure sales people optimise their time

Agreed actions

Comments

3 Key Actions for the next 6 months

*This review will have identified lots of actions with varying timelines and priorities.
However, it’s important to prioritise so that you can focus on taking the actions that will have the most impact.*

Key action 1

Key action 2

Key action 3