



# SALES EFFECTIVENESS ASSESSMENT<sup>SM</sup>



How does this statement best define our organization?	Improvement in this area would have what level of impact?
Proficiency	Impact
1. STRONGLY DISAGREE	1. LOW IMPACT
2. MODERATELY DISAGREE	2. LOW TO MEDIUM IMPACT
3. NEITHER AGREE OR DISAGREE	3. MEDIUM IMPACT
4. MODERATELY AGREE	4. MEDIUM TO HIGH IMPACT
5. STRONGLY AGREE	5. HIGH IMPACT

Reaching the pinnacle of success is an ongoing journey along curvy roads. Evaluating progress along the way will ensure you stay in the right lane.

We used research supported by thousands of interactions with buyers and sellers to create this list of best-in-class attributes of a sales force. Please use the scale outlined on the right to rate your organization's current level of proficiency and estimate the potential impact if we improved in each area.

## 1 LISTENING TO CUSTOMER

### A. CUSTOMER INSIGHTS

We systematically collect and use information from our customers to effectively plan and make decisions at all levels of the sales organization.

Proficiency 1 2 3 4 5 Impact 1 2 3 4 5

### B. COMPETITIVE INTELLIGENCE

We gather actionable insights about our competitors via customer interactions and information-rich research.

Proficiency 1 2 3 4 5 Impact 1 2 3 4 5

## 2 TARGETING AND COVERAGE

### A. SEGMENTATION

Segments are developed based on customer needs, market insights and data-driven sales potential.

Proficiency 1 2 3 4 5 Impact 1 2 3 4 5

### B. CHANNEL STRATEGY

We make it attractive for customers to use the most efficient sales channel, which ensures that the sales organization leverages the appropriate mix of field, inside, partner & e-sales.

Proficiency 1 2 3 4 5 Impact 1 2 3 4 5

### C. SIZING

The size of our sales force is based on analysis of market potential, workload, response to sales efforts and carry over from past sales efforts. Subsequent decisions revisit and build on past analysis, improving sizing over time.

Proficiency 1 2 3 4 5 Impact 1 2 3 4 5

### D. TERRITORY DESIGN

Territories are designed and consistently rebalanced based on data and analysis that addresses variations and new information, resulting in measurable, organic growth.

Proficiency 1 2 3 4 5 Impact 1 2 3 4 5

## 3 VALUE PROPOSITION

### A. DIFFERENTIATION AND MESSAGING

We use actionable messages to clearly differentiate and support value propositions that customers incorporate into their internal discussions and decision making.

Proficiency 1 2 3 4 5 Impact 1 2 3 4 5

### B. PRICING

Pricing reflects the specific value offered to each customer segment; appropriate pricing guidance and controls optimize win rates and profitability.

Proficiency 1 2 3 4 5 Impact 1 2 3 4 5

## 4 SALES PLAYBOOK

### A. CUSTOMER BUYING PROCESS

We fully understand customer buying processes and incorporate knowledge about the decision-makers, influencers and users' requirements into sales planning.

Proficiency 1 2 3 4 5 Impact 1 2 3 4 5

### B. SALES PROCESS

A replicable sales process directs reps to pursue the highest-value opportunities and significantly accelerates the sales cycle for all employees.

Proficiency 1 2 3 4 5 Impact 1 2 3 4 5

### C. SALES TOOLS

The sales organization has a manageable number of easy-to-use, value-added tools that help direct its decisions and expedite key sales activities.

Proficiency 1 2 3 4 5 Impact 1 2 3 4 5

### D. SALES CULTURE

The sales process has been embraced company-wide, resulting in a common vernacular and involvement of both sales and non-sales employees.

Proficiency 1 2 3 4 5 Impact 1 2 3 4 5

## 5 HUMAN CAPITAL

### A. COMPETENCY DEFINITIONS

The competency model identifies specific behaviors and clear distinctions between basic and advanced mastery. We actively use 360-degree evaluations and other methods.

Proficiency 1 2 3 4 5 Impact 1 2 3 4 5

### B. SALES LEADERSHIP

Sales managers serve as leaders of transformative change and enable their sales teams to hit goals via effective hiring, coaching and deal strategizing.

Proficiency 1 2 3 4 5 Impact 1 2 3 4 5

### C. HIRING

We effectively screen applicants to ensure they meet competency and experience requirements; we do not compromise based on availability of talent.

Proficiency 1 2 3 4 5 Impact 1 2 3 4 5

### D. ONBOARDING

The onboarding program ensures new hires are productive and successful in the shortest amount of time possible.

Proficiency 1 2 3 4 5 Impact 1 2 3 4 5

### E. TRAINING

We develop training content based on individually assessed skill gaps and evaluate training effectiveness based on business outcomes, not intermediate metrics, such as attendance or knowledge testing.

Proficiency 1 2 3 4 5 Impact 1 2 3 4 5

### F. COACHING

All levels of the sales organization are trained in the coaching process. We track coaching program results, which measurably contribute to sales performance.

Proficiency 1 2 3 4 5 Impact 1 2 3 4 5

### G. PERFORMANCE MANAGEMENT

We consistently apply and update the performance management process to reflect rising competency levels and competitive challenges.

Proficiency 1 2 3 4 5 Impact 1 2 3 4 5

### H. RETENTION

We aggressively pursue employees with the highest potential and consistently identify opportunities for them to succeed in different positions when applicable.

Proficiency 1 2 3 4 5 Impact 1 2 3 4 5

## 6 INCENTIVE DESIGN

### A. ALIGNMENT WITH OBJECTIVES

The incentive plan aligns very well with company and sales objectives, effectively drives sales efforts and accelerates positive results.

Proficiency 1 2 3 4 5 Impact 1 2 3 4 5

### B. PLAN SIMPLICITY AND FAIRNESS

Sales people clearly understand plan details and consistently make correct choices; compensation is fair and perceived as achievable.

Proficiency 1 2 3 4 5 Impact 1 2 3 4 5

### C. GOAL SETTING

The sales force understands and supports our goal setting methodology and how it relates to a few key metrics for each position. Goals are challenging, fair and achievable based on validated measures.

Proficiency 1 2 3 4 5 Impact 1 2 3 4 5

### D. PLAN DIFFERENTIATION

The incentive plan creates meaningful pay differentiation between high and low performers, which significantly motivates and improves overall team performance.

Proficiency 1 2 3 4 5 Impact 1 2 3 4 5

## 7 TRANSPARENT METRICS

### A. ANALYTICAL RESOURCES

Dedicated analytical resources that evaluate historic and near-real-time sales results support sales leaders and managers. Rigorous analysis, such as predictive modeling, informs future sales strategy decisions.

Proficiency 1 2 3 4 5 Impact 1 2 3 4 5

### B. INFORMATION TECHNOLOGY & SYSTEMS

Easily accessible, usable and configurable IT systems meet the needs of each level of the sales organization & provide relevant insights, which significantly improve sales force productivity.

Proficiency 1 2 3 4 5 Impact 1 2 3 4 5

### C. MEASURES & METRICS

Sales strategies, assessments and decisions incorporate organization-wide consensus as well as rigorous measurement, comprehensive metrics and analysis that is based on accurate and timely data.

Proficiency 1 2 3 4 5 Impact 1 2 3 4 5