Sales Manager Survival Guide

Sales Manager Self-Audit Checklist

Sales Manager Self-Audit and Checklist

There is no doubt, the sales manager's job is very difficult, you can never possibly remember everything you should be doing as a manager. We've developed this checklist to serve two purposes:

- A self-audit of your current habits as a manager: Use this to look at what you are currently doing. Not every item will apply to every manager. Undoubtedly, we are missing some. However, this probably represents a good starting point. Highlight those items most critical to you. If you aren't currently doing them, start now, check yourself in the future.
- A quick reminder. Perhaps every few months, as you reflect on your own performance as a manager, pull this list out and recheck yourself. Look at the things you were doing in the previous checkpoint. Look at those you had identified as needing to start. Have you continued with the previous items, have you been doing those new items you identified? Are there some you should be starting?

There is purposeful redundancy in many of the items we have identified, many critical activities apply to multiple categories. We've split the checklist into two. The first addresses more strategic issues for the entire organization and is suitable for all levels of sales management. The second is primarily focused on the managers of sales teams and addresses the sales team and manager's effectiveness.

No checklist could ever be complete. Consider this a starting point and develop one for yourself and your company. Once you've developed it, periodically pull it out and review your performance against it. Be honest with yourself, after all no one but you will see it. Its purpose is to help you and your team improve.

Using the Checklist/Audit:

As you will see, the checklist is very comprehensive, almost to the point of being overwhelming. Take some time to honestly assess your and your team's performance in each area, don't rush it.

Consider focusing on a few sections that you think are your highest priority. Leave the other sections for a future date. At

some point, you should do a complete review of the entire checklist.

For things you already have in place, in the **Current Practice** column, using a 1-5 scale (1 is Unsatisfactory, 5 Is Exceeds Expectations) assess your performance on the item.

For things you assess to be a "3" or less, first, don't worry. No one or no organization ever does everything perfectly. High performing organizations focus on continuous improvement. Take the low ranking items, prioritize them, choose the top 2-3, develop an action plan to address. When you've completed them, look at the next 2-3, and so on until you've completed the list.

Recognize, you will always be looking at improving many of these items.

For things you don't have in place, in the **Need to Start** column, set a target date for putting an action plan in place.

A Final Word:

Sometimes we tend to become too sophisticated and overcomplicate things. Effective sales management is about.

- Setting clear strategies and goals,
- Communicating them to your people,
- Having strong time based metrics in place to measure attainment,
- Providing your people the resources, skills, and tools to do their job,

- Coaching them to achieve higher levels of performance than they may have thought possible,
- Focusing on execution,
- And trusting them enough to let them succeed.

However you adapt this tool, keep it simple and make sure it enables you to achieve the items just identified.

Enjoy this tool, it's meant to cause you to think. Adapt the parts you find most useful, discard the others.

About Sales Manager Survival Guide:

These materials are supplementary materials provided to purchasers of the Sales Manager Survival Guide. For more information and resources, visit **salesmanagersurvivalguide.com**

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Checklist 1: Leadership Principles, Strategic Sales Management Issues

(For Current Practice, assess yourself on a scale of 1-5, 1=Unsatisfactory, 5= Exceeds Expectations. If you aren't doing something, use the Need to Start column to establish a target action date)

Current Practice	Need To Start	
		Culture/Value System
		Is the culture and value system of the sale organization consistent with that of the business?
		Can you describe your sales organization's culture and values to your people, partners, and customers?
		Does everyone in the organization "practice" your values every day?
		Do you hire people that are aligned with your culture and values?
		Do you regularly conduct employee and customer surveys to test how well you are doing in practicing your values?
		Do you have a clearly defined customer experience strategy that is consistent with your culture and value system? Does in the organization understand and implement their roles in this strategy?
		Leadership/Leadership Style
		Do you, does the management team practice what you preach? Is your behavior consistent with what you say? What evidence, other than your own opinion do you have?
		Do you have well defined roles and responsibilities for each manager and each person in the organization?

Current Practice	Need To Start	
		Are lines of authority and decision-making well defined and understood?
		Do you lead by example? Do you practice management by walking around?
		Do you spend more than 50% of your time in the field, with customers?
		Is your question/tell ratio significantly over 1? Do you spend more time asking questions and listening than telling?
		Do you believe your primary goal as a manager is to get things done through your people rather than being a "super" individual contributor?
		Do you provide people immediate performance feedback both when you see them doing something well, as well as when you see them doing something wrong?
		Does your feedback focus on behaviors not the individual? Do you avoid personal attacks?
		Do you provide some level of coaching to each of your direct reports every week?
		Do you leverage your review process (e.g. deal, pipeline, territory, call, prospecting, account) to coach and develop your people?
		Do you regularly get employee feedback and/or conduct "360's" of managers?
		Do you deal with performance issues on a timely basis?
		Do you regularly conduct skip level interviews to get different opinions?
		Do you conduct exit interviews for all people leaving the organization?
		Are managers measured on Performance Review quality and timeliness?

Current Practice	Need To Start	
		Do you have Performance and Development plans in place for everyone in the organization? Does each of your people understand the performance expectations?
		Do you have regular team meetings with an agenda that has been published in advance?
		Do you have regularly scheduled one on one meetings?
		Are you prepared for each of your team and one on one meetings
		In your reviews are you focused on inspecting process or activities, or both?
		Sales Functional Strategy
		Do you have a strong sales "business model" that's aligned with your business priorities, your target markets, and how your customers buy?
		Do you have a well-defined sales strategy that describes your customer, market, and other priorities? Does it clearly define your routes to market? Does it reflect the current realities of your markets?
		Does everyone in your organization, your partners, and your customers understand your strategies, target markets and priorities?
		Are your sales strategies/priorities consistent with the business strategies and priorities?
		Does your management know and agree with your strategy and priorities for the sales organization?
		Have you clearly identified your "Ideal Customer?" Both at an enterprise level and at the persona level.

Current Practice	Need To Start	
		You have a clearly defined "go to customer," sales deployment strategy. Everyone in the organization understands it.
		Do you have clear strategies for customer acquisition, retention and growth in place?
		Do the other functions in your company understand your strategies and their roles in supporting the implementation of the strategies?
		Have you clearly identified sales plans, targets, metrics (quota's and other metrics?)?
		Is everyone in the organization aware of the goals and key metrics?
		People
		Have the people in your organization internalized the strategies, priorities, culture and values of the organization?
		Do you measure voluntary and involuntary attrition?
		Do you interview people leaving the organization to get their views and feedback?
		Do you have a well-defined "Ideal candidate profiles" and Competency Models for each role in the organization?
		Do you have a funnel of candidates for all significant roles in the organization?
		Do your people feel they can be honest and straightforward with management and their peers?
		Does everyone in the organization know how they are measured/compensated?
		Does everyone in the organization have a current performance and development plan in place?

Current Practice	Need To Start	
		Has everyone in the organization had a formal performance review within the last 12 months?
		Has everyone had in interim review within at least the last 3 months?
		Does each person have a personal dashboard by which they monitor and assess their personal performance?
		Do you have a well-defined onboarding process for each role in the organization?
		Structure
		Do you have an organizational structure that is designed to optimize the execution of your sales strategies and priorities?
		Do you have well defined job roles/responsibilities/accountabilities for each job/role defined in the organization? Have they been reviewed and updated within the past 12 months?
		Are roles and responsibilities clearly defined and understood by everyone in the organization? Do your customers and partners understand who they should be working with?
		Do you have profiles of the "ideal" candidates or "A" players for each role? Have you staffed each position with "A" players?
		Do you have strong competency models for each role in the organization?
		Are your territory plans and coverage plans in place? Is there clear accountability for every territory/customer? Is it unambiguous?

Current Practice	Need To Start	
		Processes and Systems/Tools
		Do you have a well-defined selling process? Is it aligned with your customers' buying processes? Is it current?
		Does everyone in your organization understand the selling process? Are they executing it?
		Do you evaluate opportunities and funnel/pipelines against this selling process?
		Do you have all the other key processes in the sales organization defined and communicated? (Forecasting, order/order management, customer service, problem management/escalation, customer satisfaction, partnering/collaboration, etc.)
		Do you have a forecasting/pipeline/funnel management process and system in place?
		Does each sales person have well defined "healthy-pipeline" metrics?
		Do you have an opportunity planning process/system in place?
		Do you have an account management process/system place?
		Do you have a territory management process/system in place?
		Do you have a customer problem management/resolution process/system in place?
		Do you have well defined systems in place that work? Are they designed to maximize productivity?
		Do you have a CRM system in place? Are people using it? Are you using it?
		Do you have reporting requirements defined and in place? Are they designed to collect information passively, as much as possible? For reporting requiring proactive input from your people, has the reporting been designed to minimize impact on sales time?

Current Practice	Need To Start	
		Are your people using your processes?
		Do you have regular training programs on products, solutions, policies, skills, and other areas?
		Do you have processes in place to reinforce training?
		Do you have clear metrics in place for all these areas? Do you monitor regularly?
		Learning/Continuous Improvement:
		Do you have a culture and expectation around learning and continuous improvement?
		Do you coach your people on establishing their own learning and improvement plans?
		Do you have your own plan for learning and continuous improvement?
		Do you periodically reassess everything you are doing, looking for opportunities to simplify, and improve execution?
		Other:

Checklist 2: Tactical Business Management Issues:

(For Current Practice, assess yourself on a scale of 1-5, 1=Unsatisfactory, 5= Exceeds Expectations. If you aren't doing something, use the Need to Start column to establish a target action date)

Current Practice	Need To Start	
		Staffing
		How effective are you in identifying, recruiting and developing hi-potential talent?
		Do you have an available funnel of sales candidates?
		Do you have "Ideal Candidate Profiles," and Competency Models for each role in the organization?
		What is the recruiting process? Does it identify a sufficient pool of qualified and effective sales people?
		Do you have a published candidate interviewing and evaluation process? Do you adhere to this process?
		Are new hires improving the quality of your organization? What are their on and off-ramp results, attrition numbers and stack rank vs. experienced sales people?
		Can new hires get up to speed and productive quickly?
		Do you have an onboarding process? Is the onboarding process effective?
		Do new people have performance plans put in place within 2 weeks of joining? If they have sales territories, do they have a clear territory assignment?

Current Practice	Need To Start	
		Territory Management
		Have you developed an overall business opportunity assessment for your assigned territories and/or accounts?
		What is each seller's territory performance and penetration? What about new logo sales as compared to growth of existing accounts?
		Do you have proper coverage for each territory?
		Are territories assignments fair and equitable?
		Does everyone know their quota assignments and how their performance in the territory will be measured?
		Do your sales people develop effective territory strategies?
		Are you reviewing these strategies and territory plans on a regular basis?
		Have any overlaps or confusion in territory assignments been eliminated?
		Opportunity Strategy Development
		Are your deal strategies based on a strong sales process that your people are using? Is it aligned with your customer buying processes?
		Are effective opportunity plans developed for your top opportunities? Do you regularly review and develop strategy around opportunity plans? Do you help your team in strengthening their plans and competitive position?
		Do your people update their opportunity plans as they move through the buying/selling cycle?

Current Practice	Need To Start	
		Does your team effectively utilize internal resources and strategic partners? What kind of relationship do you have with key resources from both inside and outside the company?
		Are you conducting at least one deal review with each person once a week? Are you providing strong coaching in the deal review?
		Are you reviewing deals at every stage of the sales process?
		Are you helping your people develop stronger deal strategies through your coaching?
		What are close rates for top opportunities? Are you providing leadership to help improve close rates?
		Do you regularly conduct win/loss reviews and act upon your findings?
		How effectively do you identify and leverage best practices in the organization? Are you coaching your people on these best practices?
		Pipeline/Funnel Management
		Do you have a strong pipeline management process that's built on your sales process?
		Do your people understand how to manage the pipeline?
		Does each person understand their individual "healthy pipeline metrics?" Are you coaching them to develop healthy pipelines?
		Do your pipelines have high integrity? Do they have sufficient volume and velocity?
		Do you leverage pipeline metrics to help determine prospecting goals?

Current Practice	Need To Start	
		Do you have a regular schedule for pipeline reviews that's appropriate for your sales cycles?
		Sales Call Planning/Execution
		How effective are seller sales calls? Are you utilizing a formalized call planning process with guidelines as to when and how to employ?
		Are you participating in calls and giving your sales people feedback on their execution of the call plans?
		Are people using your selling process and their deal strategies to help develop their call plans?
		Do your people make sure the customer is as prepared for the meeting as they are? Do they agree on agendas objectives in advance?
		Do you coach and debrief calls after the sales person has completed them?
		Account Planning
		Do your sales people develop effective account plans for their top accounts? Do they keep these plans current? Are you reviewing and coaching them on improving the account plans?
		Are they executing the account plans? Are seller account plans effective? Do your sales people perceive value in account reviews?
		Are your sales people actively expanding their relationships within the accounts?
		Do people in the account actively seek your sales people's opinions about their business and operations?

Current Practice	Need To Start	
		Are your sales people actively engaged in seeking feedback from the account on customer satisfaction? Are they assuring that all customer sat issues are being addressed?
		Are you actively engaged in calling on accounts?
		Value Creation and Consultative Sales
		How well do you and your sales people understand the company's solutions and competitive differentiators? What about the role of strategic partners?
		How well do your sales people know their customer's business and competitive priorities?
		Do your sales people engage resources early in the sales/solution development process? Is it effective?
		Can your team develop and present business justified solutions for each opportunity?
		Are your people developing, communicating, and delivering differentiated value that your customers buy?
		Are your people creating value in every interchange with the customer? Do your customers think your people use their time well/
		Does your customer bring you to the planning table as a partner or are you considered a vendor (be honest)?
		Are your business cases aligned with the top priorities of customer executive management? Do you help the customer connect the dots to the top management priorities for the customer?
		Customer Centricity

Current Practice	Need To Start	
		Regarding you and your team – what's the customer perception of your: Industry expertise? Understanding of the customer's organization? Knowledge of customer business needs, issues, drivers and competitive environment? Contributions to helping them think about growing their business?
		Is the organization strategically positioned with customer executives at appropriate levels throughout its functional areas and business units?
		Do your sales people know the primary executive's strategic plan? Priorities?
		Do your people know how your customers' performance is measured and evaluated?
		Do your teams conduct regular customer quality and performance reviews?
		What are results against customer service metrics? Customer sat?
		What is your customer churn rate and are the resources and plans in-place to address?
		Do you regularly meet with customers to understand their needs, strategies, business drivers, and attitudes toward your people and company? Do you ask them for suggestions on how you can better serve them? Do you act on those suggestions?
		Would your customer recommend your services to others?
		Sales Process Management/Business Management:
		Do you have well defined sales processes that are aligned with your customer buying processes?
		Are your people using your sales process?

Current Practice	Need To Start	
		Are your people keeping a balanced funnel? Do they spend the appropriate amount of time prospecting, qualifying, proposing and closing?
		Are your people doing the appropriate job in disqualifying?
		Do you have metrics in place to track performance in all phases of the selling process?
		Are you inspecting their process to make sure it is under control?
		Are you using the sales process to coach and develop the effectiveness of your sales people?
		Do you audit, review and update your sales process at least annually?
		Teamwork:
		Are your people working collaboratively, helping other team members out, providing ideas and support?
		Are they working effectively and collaboratively with other organizations in the company?
		Do you stimulate strong teamwork and collaboration?
		Operational Effectiveness
		Do your sales people understand your organizational resources and the impact they have on their success?
		Do your sales people use resources as effectively as possible?

Current Practice	Need To Start	
		How effectively do your teams drive both support and partner organizations?
		Are partner organizations sufficiently involved in identifying and solving customer issues?
		Do you have the opportunity to provide input and direction to partner organizations such as: marketing, training, finance etc?
		Do you get your people the resources and support they need from the rest of the organization?
		Do you "protect" your people from the "good intentions" of the rest of the organization, letting them focus on managing their territories and opportunities?
		Driving Results/Coaching (review of key metrics)
		Do your sales people understand the organization's key metrics and impact on the business? What about your key metrics?
		How well do you understand the effectiveness of your sales people in key areas: Type and volume of activity? Opportunity and pipeline funnel including: close ratios, standards and cycle time? Forecast Accuracy? Sales tool utilization (SFA, order entry, billing, revenue etc…)? Do your people understand the importance of these metrics?
		Do you have metrics in place to track effectiveness and efficiency? Does each person understand their performance in these areas?
		Does each seller engage in gap planning as required?
		How do you inspect key metrics? Can you easily and accurately articulate to your management?

Current Practice	Need To Start	
		Do you conduct at least one deal review and one call review with each person each week? Are you coaching them, helping them improve their execution of these?
		Do you conduct regular, effective one on one's?
		Are you conducting regular pipeline, account, territory, and prospecting reviews? Are you leveraging each review opportunity for coaching and developing your people?
		Are you focused on non-directive coaching techniques?
		Does each person understand where they stand performance wise, and what they need to be doing? Do you provide regular feedback and coaching?
		Do you know your team's participation rate and is this an important metric to you?
		Does your management understand where you are in the key performance areas? Do they support your plan?
		Active Performance Management and People Development
		How effective is your goal setting and review process?
		Do you conduct seller competency/skill assessments?
		Do you and your sales people each have relevant individual development plans? Is achievement against these plans reviewed on a regular basis?
		What are your team's primary skill development areas? What is the plan to address?
		Are you a coach or a boss? How much time do you spend coaching?

Current Practice	Need To Start	
		What is your ask versus tell ratio? Do you coach through asking questions or by telling?
		Do your people clearly understand where they stand on their performance? Would they be surprised if they received a performance review right now?
		Do you facilitate and embrace multi-level feedback? What do you do with the results of that feedback?
		Do you provide active feedback, both positive and developmental immediately?
		Do you do semi formal performance reviews at least quarterly?
		Are you coaching each person at least once a week?
		How effective is your new hire On Boarding process and training plan?
		Do you address performance and behavioral issues on a timely basis?
		Organizational Development
		Are you identifying and developing high-potential sales people?
		What are you doing to develop and/or manage out low-performing sales people?
		What are you doing to develop future leaders?
		What are your organization's goals and objectives? How do they impact performance?
		How well do you motivate your people?

Current Practice	Need To Start	
		Have you identified any performance issues or problems? Are you actively addressing these issues with the people and seeking to improve performance? Do you have a documented plan in place?
		Do you have a good understanding of your team's attrition? Is it good or bad attrition and what is the plan to up-skill your organization?
		Do you have a personal development plan for yourself and improving your capabilities as a manager and leader? Is your manager actively involved in helping you?
		Are you constantly recognizing great performances?
		Effective Communications
		Have you effectively communicated objectives and your vision for the organization to both your organization and to your management?
		How are you encouraging your team to provide you feedback and input? What changes have you made based on feedback?
		Are you organized and documented when it comes to your people?
		Do you communicate the "wins" and accomplishments of the team to the rest of the organization?
		Do you recognize and celebrate great performance?
		Does your management understand and support what you are doing with your strategy and your people?
		Do you have regular and effective team meetings?

Current Practice	Need To Start	
		Your Time Management And Priorities
		Are you acting as a manager/leader or a super individual contributor?
		Are you acting as an administrator or coach?
		Are you spending at least 50% of your time in the field with your people and customers?
		Are you supporting and defending your people where appropriate?
		Are you anticipating problems/challenges and acting proactively to avoid them
		Are you addressing performance and behavioral issues on a timely basis?
		Do your people actively seek your advice and coaching?
		Do your peers actively seek your advice and coaching?
		Does your management actively seek your advice and coaching?
		Are you using the tools you expect your people to use?
		Are you leading by example or by mandate?
		Do you spend more time asking questions and listening than talking?
		Do you visibly recognize outstanding performance both within your team and in supporting areas? Do you promote those performances within the organization?

Current Practice	Need To Start	
		Do you have a plan in place that will enable you to achieve the goals you have established for yourself and those that your management has established? If there is a gap, do you have a corrective action plan in place that management buys into?
		Do you have a personal development plan in place to continually improve yourself and your capabilities?
		Do you take time off to think, plan and reflect?
		Do you exercise?
		Do you keep current in professional literature (trade magazines, sales literature, etc? Do you keep current on other professional issues and trends?
		Are you actively engaged in building your network, within the company, with your customers, within the industry, outside?
		Do you meet deadlines and goals you have set for yourself and your team? Do you meet deadlines and goals your management has set?
		Do you continually develop your capabilities to use the tools of your profession and keep yourself current in those?
		Do you proactively seek feedback on your performance from your people, your peers, your management, and others in the organization? Do you receive that feedback positively and act on it as appropriately?
		Do you respect the time of others, including your people?
		Systems/Tools/Programs:

Current Practice	Need To Start	
		Do you have a good CRM system in place that sales people are using and keeping current?
		Do the sales people understand how to leverage CRM and related systems to improve their effectiveness?
		Are you using the CRM system yourself?
		Do you have other productivity tools and Apps to help increase productivity and effectiveness?
		Are you constantly reassessing your technology stack to make sure you are providing your people the tools critical to improving their effectiveness?
		Do your people have mobile tools to help improve their effectiveness in the field and at customer locations?
		Do you provide playbooks, battlecards, and related tools to help focus sales people on executing best practices?
		Do you have collateral, case studies, product in formation and other materials that are relevant and useful for your sales people? Do they know how to use them for best impact?
		Do you have strong demand gen/lead gen programs developed with marketing? Do these programs provide an adequate volume of Sales Qualified Leads?
		Do your people know how to handle the Sales Qualified Leads properly, are they leveraging them and closing them on a timely basis?
		Training
		Do you have a training plan to keep people current on your products, solutions, sales skills, problem solving, project management, business acumen, market/industry/customer knowledge, collaboration?

Current Practice	Need To Start	
		Are training programs customized to your specific company, priorities, and strategies.
		Have you integrated the principles into your systems, processes and tools to reinforce the training?
		Do you have a coaching reinforcement plan for each training program you implement?
		Are you doing the coaching and reinforcement?
		Do you establish a continuous learning/improvement climate in your organization, so people actively seek learning opportunities on their own?
		Others: To make this document useful, add items that we may not have covered, but are important in developing your skills and performance as a manager.