	SALES TE	AM ANALYSIS			
	COMPANY/ TEA	M INFORMATION			
Company name: Name of individual sales reports into:					
Division/ Dept. name:		Title of individual sales reports into:			
# Sales Teams:		# of Sales Managers:	•		
# of Inside Sales Associates:		# of Outside Sales Ass	ociates:		
	SALES TEAP	M INFORMATION			
Lowest Annual Quota:	Highest Annual Qu	ıota	# of products/ services sell		
Year to Date Results in \$:	Year to Date Resu	lts in # Sales	Average close ratio:		
Year to Date % of Quota:	Last year's % of Q)uota	# Sales Associates over Quota		
# of Months exceeded quota this year:		eded quota last year	Profit margin		
Average Sale in \$:	Largest sale in \$	· · · · · · · · · · · · · · · · · · ·	Smallest sales in \$		
Average Sales Cycle:	Longest Sales Cyc	le	Shortest sales Cycle		
Average learning curve for new associate months:					
# New Sales Associates hired this year:		# New Sales Associate	s that left this year		
# New Sales Associates hired last year:		# New Sales Associate	s that left last year		
Turnover level this year:	%	Turnover level last yea	r: %		
# Sales Associates looking to hire this ye	ear:	# Sales Managers looking to hire this year			
Source of candidates:					
Frequency of team meetings:		Frequency of one on one meetings			
Frequency of field rides:		Frequency of sales training			
Who does the sales training?		Other development?			
		enior sales associate: Average tenure:			
	TEAM BR	EAKDOWN			
NAME YEA	TEAM BR RS WITH COMPANY	EAKDOWN TENURE	% OF QUOTA		
NAME YEA			% OF QUOTA		
NAME YEA			% OF QUOTA		
NAME YEA			% OF QUOTA		
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NAME YEA			% OF QUOTA		
NAME YEA	RS WITH COMPANY		% OF QUOTA		
NAME YEA	RS WITH COMPANY	TENURE	% OF QUOTA		
NAME YEA	RS WITH COMPANY REVENUE B	TENURE			
	RS WITH COMPANY REVENUE B	TENURE			
Repeat Business:	RS WITH COMPANY REVENUE B	TENURE			
Repeat Business: Additional Business:	RS WITH COMPANY REVENUE B	TENURE			

	Current Yea	r		Last Year		
Client referral (solicited)						
Client referral (unsolicited)						
COI referral						
Networking event						
Networking group						
Networking association						
Cause/ board of directors						
Webinar						
Speaking engagement						
Company sponsored event						
Phone prospecting						
Foot canvassing						
Email campaign						
Letter campaign						
Marketing Efforts						
Lead generators						
Distributors						
Channels						
LinkedIn						
Facebook/ Twitter						
	CURRENT GOA	LS/ PRIORITIES	/ INITIATIV	ES		
SHORT TERM GOALS						
LONG TERM COALS						
LONG TERM GOALS						
	6014	DANIV THEODIA	FTON			
COMPANY INFORMATION						
COMPETITIVE INFORMATION	I		T			
TOP 3 COMPETITORS	COMPETITIVE	ADVANTAGES	COMPETIT	TIVE DISADVANTAGES		
	TOP REA	ASONS CUSTOME	RS BUY			
		ORMANCE SATIS				
	SALE	S TEAM ATTRIB				
STRENGTHS			AREAS	S OR OPPORTUNITY		

WH	AT AREAS WOUL	D YOU LIKE TO S	SEE IMPROVEMENT			
	LARGE	 EST SALES OBSTA	ACI ES			
	LAKOL	IST SALLS OBSTA	CLLO			
	TIME MANAGEM	ENT FOR YOUR SALE	ES ASSOCIATES			
HOURS WORK PER WEEK	НО	URS	TOO MUCH, ENOUGH, NOT ENOUGH			
PROSPECTING						
ADMINISTRATIVE TASKS						
CUSTOMER SERVICE/ ISSUES						
DRIVING						
NEW PROSPECT VISITS						
CLIENT VISITS						
TYPICAL DAY/ WEEK						
	:	SALES PROCESS				
DESCRIBE THE INDIVIDUAL STEPS OF YOUR SALES PROCESS						

RATING	VERY GOOD	GOOD	NEEDS IMPROVEMENT	N/A
General Skills				
Time Management				
Territory Management				
Organizational Skills				
Handle Details Well				
CRM Use				
Communication/ People Skills				
Verbal skills				
Writing Emails				
Listening Skills				
Handle Conflict				
Problem Solving				
Ability to Negotiate				
Internally				
With prospect/clients				
Relationship building				
Networking				
Activity Levels				
Net New Prospects Appointments				
Client Appointments				
Networking Appointments				
Proposals/ Demos/ Presentations				
Networking events/ groups/ associations				
Goals & Achievements				
Set Goals				
Written Goals				
Achieve Goals				
Performance Levels				

Utilizing Strategic Plan				
Attitude & Motivation				
Works to Potential				
Positive Attitude				
Enjoys Work				
Motivation level				
Resilient				
Self-development efforts				
Level of commitment				
RATING	VERY GOOD	GOOD	NEEDS IMPROVEMENT	N/A
Prospecting				
Prospecting Plan				
Prospect consistently				
Get through gatekeeper				
Utilize benefit statements				
Reference other clients				
Handle objections				
Close for the appointment				
Sales Process				
Run effective first appointment				
Build business rapport				
Confirm time				
Set expectations and agenda				
Uncover decision maker(s)				
Uncover decision making process				
Uncover alternatives being considered				
Uncover decision making criteria				
Uncover decision making timeline				
Uncover must have or like to have				
Uncover prospect's hot buttons				
Trial close				
Plant seeds/ traps for competition				
Presentation skills				
Handling objections				
Negotiating skills				
Closing skills				
Networking Skills				
Asking for referrals				

Strong circles of influence		
Give referrals consistently		
Viewed as well networked		
Get referrals consistently		
LinkedIn		
Use LinkedIn regularly		
LinkedIn recommendations		
LinkedIn connections		
Generated business from LinkedIn		
Sales Performance		
Satisfaction with revenue levels		
Pipeline level		
# Sales associates with adequate pipelines		