

Annual Sales Organization Check-up

Sales Area	Self-Assessment (1 is lowest, 10 is highest; Do not use 7)	Importance (1 is lowest, 10 is highest; Do not use 7)	Comments
Business Results			
Company meets its financial goals (e.g., revenue, fixed costs and variable costs), market share goals, and customer/ employee satisfaction goals	1 2 3 4 5	1 2 3 4 5	
	6 8 9 10	6 8 9 10	
Strategy and Culture			
Company mission, values, sales culture, and sales strategy are documented for the entire sales organization	1 2 3 4 5	1 2 3 4 5	
	6 8 9 10	6 8 9 10	
Company mission, values, sales culture, and sales strategy are understood and well integrated into the sales organization	1 2 3 4 5	1 2 3 4 5	
	6 8 9 10	6 8 9 10	
People			
The right sales people are in the right seats on the sales team's bus	1 2 3 4 5	1 2 3 4 5	
	6 8 9 10	6 8 9 10	
Sales recruitment and hiring processes produce successful results	1 2 3 4 5	1 2 3 4 5	
	6 8 9 10	6 8 9 10	
Sales coaching is conducted regularly and increases sales productivity	1 2 3 4 5	1 2 3 4 5	
	6 8 9 10	6 8 9 10	

Sales Area	Internal Assessment (1 is lowest, 10 is highest; Do not use 7)	Importance (1 is lowest, 10 is highest; Do not use 7)	Comments
Sales Processes			
Sales people prospect well	1 2 3 4 5 6 8 9 10	1 2 3 4 5 6 8 9 10	
Company-defined process exists for sales calls; sales people perform to company standards	1 2 3 4 5 6 8 9 10	1 2 3 4 5 6 8 9 10	
Company-defined process exists for sales opportunity management; sales people perform to company standards	1 2 3 4 5 6 8 9 10	1 2 3 4 5 6 8 9 10	
Company-defined process exists for territory management; sales people perform to company standards	1 2 3 4 5 6 8 9 10	1 2 3 4 5 6 8 9 10	
Company-defined process exists for account management; sales people perform to company standards	1 2 3 4 5 6 8 9 10	1 2 3 4 5 6 8 9 10	
Sales Tools			
Company has successfully implemented CRM	1 2 3 4 5 6 8 9 10	1 2 3 4 5 6 8 9 10	
Company has successfully implemented sales forecasting	1 2 3 4 5 6 8 9 10	1 2 3 4 5 6 8 9 10	
Company has successfully implemented sales metrics	1 2 3 4 5 6 8 9 10	1 2 3 4 5 6 8 9 10	
Other			
	1 2 3 4 5 6 8 9 10	1 2 3 4 5 6 8 9 10	

Email completed assessment to Sales@EPOCHSalesManagement.com, or fax completed form to 469-481-2475 if you would like to discuss your annual sales organization check-up with us.