

## SalesProcess360 CRM Audit: Sales Process Review Questionnaire

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### Part I: Company

The goal of this section is to get you thinking about your overall business structure. It's probably more complex than you think, so writing down each of the high-level touch points within the business will help you better visualize it. Remember: CRM is about process, not technology. For maximum ROI, your entire team should have a stake in its success.

- Describe your company in terms of territories, branches, divisions and business units.
  - Review your management hierarchy, specifically in sales and territory management. Are outside and inside salespeople teamed up?
  - How many outside salespeople do you have? Inside salespeople?
  - Does inside sales report to a sales manager or to the branch/ operations manager?
  - Do you have a service department? What is its focus?
  - Do you have product specialists? What is their focus?
  - Do you have a separate marketing department? What is its focus?
- What is your salesperson review process? How often and what is the format? Provide an overview of your compensation plan.
- When a new outside salesperson is hired, what does the getting-started program look like?
- When a new inside salesperson is hired, what does the getting-started program look like?
- Do you currently have a CRM system? How is the team using it? What are your expectations?
- Is your ERP or accounting system integrated with your CRM system?

### Part II: Outside Sales

Think strictly about your outside sales team – how they report on their activity and how they manage the workload they are assigned. Do you have a feedback loop in place with your salespeople?

- Review all the reports and input and update responsibilities for outside sales. For example, weekly call reports. (Provide details: How often, what format, how are reports being used, etc.?)
- What are the average number of accounts for an outside salesperson?
- Do they have target accounts? Define target account.

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- If you are using CRM, what are the expectations for the outside sales team for inputting and maintaining it?

### **Part III: Inside Sales**

When thinking about the role of your inside sales team, how much interaction do they have with your outside salespeople? Do you actually call your inside salespeople “sales” or do you call that team “order entry” or “customer service”? What you call this team says a lot about the philosophy of your company. Answer these questions to better understand how your inside sales team is viewed and used within your company.

- Is the title of inside sales actually inside sales? Or is it customer service? Why?
- How are inside sales documenting their interaction with customers?
- Review all the reports and input and update responsibilities for inside sales.
- What are the methods and processes used by inside sales to communicate with outside sales?
- If you are using CRM, what are the expectations for the inside sales team for inputting and maintaining it?

### **Part IV: Service**

For most companies, the service group is an island. If you have a service team, what is its role in the company? Is there any communication between it and the rest of your team? Use these questions to better understand your service team’s role in the business and to uncover potential opportunities to maximize its impact.

- If you have a service team, how do they document their work? Where does this documentation land?
- Does service participate in sales meetings?
- If you are using CRM, what are the expectations for the service team for inputting and maintaining it?

### **Part V: Marketing**

While the link between sales and marketing should be clear, unfortunately in many companies, the communication lines between the two departments are broken. No feedback loop exists on the leads generated by marketing, for example, and very little coordination occurs between the two.

- If you have a marketing person or department, provide an overview of what they focus on and how they work with the sales team.
- Do you do any email marketing campaigns? Other campaigns? Give an overview.
- If using CRM, what are expectations/responsibilities for the marketing team’s input and maintaining the system?

## **Part VI: Lead Management**

Getting and qualifying quality leads is one of the most critical parts of the sales process. After all, the leads you put in your sales funnel can increase or decrease the chances for sales success down the line. Unfortunately, most companies are handing over nonqualified leads to the sales team with no follow-up process. Think about how your business handles lead management.

- What are your sources for leads?
- Review the lead input and follow-up process within your company.

## **Part VII: Opportunity Management**

Surprisingly, many companies don't have a clear definition of what an opportunity looks like for their business. Before a potential opportunity gets to the quote stage – when it's already too late – how are you handling and qualifying it within the company to ensure you're not just a third bid? Use these questions to think about how you manage opportunities.

- Are you doing opportunity management? What is your definition of an opportunity?
- Review the input and management process of the opportunity from start to finish.

## **Part VIII: Quote Management**

Is your business a quoting machine? Or are you careful about the opportunities that move to the quote stage? How do you follow-up with quotes and use the data generated by that to look forward with your business? Use these questions to dive deeper into your quote management process.

- What is the estimated number of quotes done a day by the company? By person?
- Who is responsible for doing quotes?
- Are there standards for what quotes look like?
- Who is responsible for updating and managing quotes?
- How are quotes done and presented to the customer?
- Where are quotes stored?
- What is the follow-up process for quotes? (Who, what and when?)
- Are there a lot of phone and email reply quotes given (quick quotes)?
- What do you think is the percentage of quotes that are formal written quotes versus quick quotes (verbal or quick-reply email)?

## **Part IX: Reports**

Now let's look more closely at how you're currently tracking and sharing information within your company.

- What are the key reports management uses to manage business on a weekly/monthly/quarterly basis? Provide specific examples.
- Do you review the reports the sales team gets from management on a weekly/monthly/quarterly basis?
- Do you receive forecasting reports? How do you get those forecasting reports? Discuss your current process for this.

#### **Part X: Additional Sales Process Questions**

- Do you establish and manage sales goals with your sales team? Provide an example in detail of who, what and when.
- How are these goals determined and what is the monitoring process and system?
- Do you do target account management? If yes, provide an overview.
- Are you doing major project pursuit and management? If yes, provide an overview.
- Do you have any salespeople focused on calling on engineering firms or contractors? If yes, provide an overview.
- If I asked your sales team, both outside and inside, about which top three to five manufacturers they should be spending their time on, would I get a consistent answer across the board?
- Do you measure and monitor activity by key manufacturers and products your company needs to focus on? How?
- How are you handling any reports manufacturers are requiring of you?
- How are you handling manufacturer visits? Write down your process, if you have one.
- Have you established key performance indicators (KPIs)? What are they?
- How do you measure and monitor them?
- Are you profiling contacts and/or companies? (hierarchy, role, interest by product, applications)
  - Are you tracking competitors? Explain.
  - Are you tracking successes? Explain.

**Would you like to review this with a SalesProcess360 expert?** Schedule an appointment by calling 504-355-1150 or email [sales@salesprocess360.com](mailto:sales@salesprocess360.com)