

SalesProcess360 CRM Audit: Sales Process Gap Analysis

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This is Step 2 of the SalesProcess360 CRM Audit. What we are going to do now is take your answers from each of the sections in the Sales Process Review and write down two to three areas of improvement – or gaps – where you feel you could add focus with improved processes. That is our starting point for where you can get the most out of CRM.

List your gaps in the following categories:

Company

- 1.
- 2.
- 3.

Inside Sales

- 1.
- 2.
- 3.

Service Department

- 1.
- 2.
- 3.

Marketing

- 1.
- 2.
- 3.

Lead Management

- 1.
- 2.
- 3.

Opportunity Management

- 1.
- 2.
- 3.

Quote Management

- 1.
- 2.
- 3.

Reporting

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- 1.
- 2.
- 3.

Other Areas

- 1.
- 2.
- 3.

Would you like to review this with a SalesProcess360 expert? Schedule an appointment by calling 504-957-8499 or email sales@salesprocess360.com