

Sales Performance Checklist

Are you consistently getting your fair share (or more) of the market opportunity? We developed the checklist below for your private use to help you rate your current level of satisfaction in the following sales areas. The checklist is based on a scale of 1-5, with 5 being completely satisfied.

1) Not at all satisfied 2) Slightly 3) Moderately 4) Very 5) Completely satisfied

Area	Satisfaction Level
Quantity & quality of inbound marketing qualified leads (MQLs) needed to achieve monthly sales targets	1 2 3 4 5
Quantity & quality of outbound lead generation activities needed to achieve monthly sales targets	1 2 3 4 5
Quantity & quality of sales qualified leads (SQLs) needed to achieve monthly sales targets	1 2 3 4 5
Visibility, predictability, and achievement of the monthly sales forecast	1 2 3 4 5
ROI from marketing and sales spend (e.g. conversion rates from interest to appointment to close)	1 2 3 4 5
Response time and regularity of follow up activities, messaging, & calls to action	1 2 3 4 5
'Aged' lead follow up activities (e.g. prospects rated other than A or B)	1 2 3 4 5
Sales team has the framework and skills to make discovery calls & introductory emails that lead to next steps	1 2 3 4 5
Sales team has the framework and skills to perform value based discovery and demonstrations (e.g. problem/solution rather than feature/function)	1 2 3 4 5
Awareness, adoption, and utilization of sales technology tools	1 2 3 4 5