

Sales Effectiveness Assessment

The Sales Effectiveness Assessment service has been designed specifically to help small businesses develop an efficient sales process into the organisation which proactively seeks new business and efficiently manages existing business and accounts. In addition, it will address any issues which may be causing concern within the existing operation. Despite involving a full eight hours of work by Proactive Sales to complete, the assessment is delivered free and with no further obligation.

The assessment thoroughly examines a wide range of factors that contribute to the overall success of a company's sales operation in the context of their current activities. The output from the assessment process is a detailed report that identifies a sales strategy, areas of current activity that require improvement and proposals for additional activities as needed. Illustrative pricing is provided where possible.

The assessment process is carried out in three stages.

Stage 1 – Company Interview

An interview is conducted with the Managing Director (or equivalent) and, if relevant, the senior manager with responsibility for Sales. The interview takes around two hours and specifically covers the following factors:

Factor	Areas Assessed
Company Position	Years in business, growth over last 2 years, no of employees, no of customers, repeat business levels, geographic factors, market saturation level, company's principal strengths and weaknesses
Company Aspirations	Growth aspirations in both £s and % for revenue and profit, growth in number of employees, growth in number of customers and repeat business levels, changes in mix/type of customers
Offer Portfolio	Offer descriptions, quality relative to competitors, completeness, lead times, ease of purchase, key discriminating factors, life cycle positions, ideal customer profiles, pricing models, sales channels
Competitors	3 x examples of major competitors, including their competing offers, reasons for losing business to them, their marketing activity, relative size and the principal base for competition (lower price, faster delivery, more local, customer loyalty, better offer, years in business, etc.)
Current Customers/Future Customers	3 x examples of current customers, including reasons for buying, profitability, purchasing history, why they became a customer originally, exclusivity level, contact information 1 x example of a non-customer that it is desirable to win
Sales Effectiveness	Sales & Customer Service team structures, targeting & incentivisation, sales and reporting processes, administration and support functions.
Management of the Sales Process	New lead generation, how current leads are managed, communication methods, stages in the process, conversion rates, planning customer interaction, lead/ customer management, recording customer interfaces/CRM system,current buying cycles

Account Management	Small and large accounts, frequency of contact, cross-selling, maximising benefit of Customer interface, key account management process, specific account responsibilities
Sales Management/Skill Levels	Current skill levels, moral/motivation, target setting and monitoring, incentive programmes, communication/sales meeting, relating Company performance to sales strategies, planning for the future
Marketing Materials	Website, Product/Service Information, Case Studies, Testimonials
Expectations for Improvement	Desired outcomes in terms of sales pipeline, bid-win ratios for new customers, repeat business levels and profitability

Stage 2 – Collation and Report Production

Following the Customer interview, all the information that has been collected will be collated and assessed to establish an overall sales effectiveness. The report will clearly define areas where the process is working and little or no adjustment needs to be made. In addition, where there are areas which can be improved then a series of recommendations will be put forward that will contribute to achieving the company's ambitions (as stated in the company interview) and that are within the company's budget.

In the report, the principal assessment results cover the following key areas:

Area	Assessment Criteria
Management of the Sales Process	Covers key elements that should be part of the normal day-to-day operation of an effective Sales team. These areas will be assessed and ranked according to their current levels of effectiveness.
Account Management	As with management of the sales process, the key elements of an effective management of existing accounts will be examined and how the current team score against the main criteria.
Sales Management/Skill levels	The key elements required to be an effective Sales Manager will be assessed along with an assessment of the current skill levels both within the Sales Management process and the team itself. These will be ranked against what is ideally required in order to be effective in these areas.

Stage 3 – Assessment Presentation

To complete the assessment process, the report will be personally presented to the company. Proactive Sales spends eight hours in total, researching, writing and presenting the Sales Effectiveness Assessment. It is a very thorough and highly beneficial service.