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1.

Sales Analysis Data Sheet

Answer all of the following items. You may use a separate page if you label your responses by number. When finished, please fax to 616-647-8701. Thank you.

Nar	ne of Company:		
	Address:		
	City, State, ZIP:		
	Type of business/Inc	ustry:	
	2. Contact Name: 8	a Title:	
	Phone:	<u> </u>	
	Email addre	S:	_

3. Describe the title, type(s) of selling you do and the number of salespeople engaged in each. One example is listed.

Title	Type of Selling	Number of salespeople
"Relationship manager"	Outside direct sales	25

4. Where does your sales organization most need help? What's your current challenge?

5. Selling Environment Analysis

Although the following factors apply to most sales situations, not all are equally important to specific industries, companies, or even branches within a company. Corporate culture, local management priorities and marketing strategies produce a unique selling environment.

Please consider the following abilities and rate their importance to the specific type of selling you do. Check the box under the correct column.

- 1. Initiates contact with current or potential customers
- 2. Tolerates change; works well under pressure
- Detail conscious; analyzes information; highly organized
- 4. Spontaneous; thinks well on feet; doesn't get bogged down in details
- 5. Comfortable speaking in front of groups
- 6. Empathetic; concerned with customer feelings; closing sales NOT as critical as opening relationships
- 7. Doesn't hesitate telling others she/he is in sales

Critical To Job	Somewhat Important To Job	Not Important	Detrimental To Job

		Critical To Job	Somewhat Important To Job	Not Important	Detrimental To Job
8.	Not intimidated calling on business owners or wealthy prospects				
9.	Networks with business associates				
10.	Expected to sell to friends and family members				
11.	High level of physical energy; expects to work long hours				
12.	Sets sales goals and works daily to achieve them				
13.	Uses the telephone comfortably for prospecting and closing sales				
14.	Uses telephone comfortably for making appointments and follow-up				
15.	Highly focused; multi-tasking is NOT expected				
16.	Follows up every sale asking for referrals				
17.	Independent, self-directed more than team- oriented; controls the sales process and asks for the order with little if any hesitation; strong closer				
18.	Is patient with longer sales cycle of consultative selling rather than one or two call				

Other important abilities, skills, or attributes not included above:

Finally, of those factors you marked "Critical to the Job" prioritize the top two or three. Write the number or factor beside each.

#1 (Top Priority)

closer

#2 (2nd Most Important)

#3 (3rd Most Important)

6. How do you measure sales performance? What numbers do you track? Do you track activities (number of calls, conversations, etc.)? Please be specific. Can you supply us with reports?

- 7. What CRM system do you use (if any)?
- 8. What sales training have you used or do you currently use?

Training Company:				
How long has it been since salespeople completed this training?				
If you have developed your own sales training, please describe its key features and outcomes.				
Is your sales training (check one) face-to-face? distanced-based? Other If Other, please describe:				
If face-to-face, who delivers the training				

Other training programs:

9. Individual Sales Productivity

Please complete the following *for each salesperson* involved in this study. (Continue on back or separate page if needed). It's important for research purposes to reduce the impact of tenure on production. Long-time salespeople will usually have bigger sales numbers than new hires, but we are interested in the number of new accounts added in the last 60 days. The production category is a subjective evaluation of sales potential. Even new reps may possess more actual sales potential than long-term salespeople nursing several large accounts.

Name	Months Tenure with Company	Number of new accounts added in the last 60 days	Production Category (1-5) 1=Top 10% 2=Above average, 3=Average, 4=Below average 5=Bottom 10%	What percent of production is new business vs. sales from existing or inherited accounts?
(conv this page if needed)				

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