



## Sales **People, Processes, & Plan** High Performance Checklist

Use the following checklist to identify gaps and opportunities in your sales organization across three critical areas: People, Processes, and Plan.

For each statement, rate your performance on a scale from 1 to 5, where 1 means "Not at all" and 5 means "Fully implemented." Tally your scores at the end to determine your overall performance and get personalized recommendations.

# People

## Talent Acquisition:

- Are you successfully identifying and recruiting top sales talent? [ 1 2 3 4 5 ]
- Do you have effective hiring processes in place? [ 1 2 3 4 5 ]
- Are your job descriptions and interview frameworks comprehensive? [ 1 2 3 4 5 ]

## Training and Development:

- Do you have onboarding programs for new hires? [ 1 2 3 4 5 ]
- Are there continuous professional development plans for your team? [ 1 2 3 4 5 ]
- Do you conduct sales skills workshops and seminars? [ 1 2 3 4 5 ]
- Are mentorship and coaching programs available for your sales team? [ 1 2 3 4 5 ]

## Performance Management:

- Are clear performance metrics and KPIs (key performance indicators) set for your sales team? [ 1 2 3 4 5 ]
- Do you conduct regular performance reviews? [ 1 2 3 4 5 ]
- Are there incentive and recognition programs to motivate the team? [ 1 2 3 4 5 ]
- Do you develop personal improvement plans for underperforming reps? [ 1 2 3 4 5 ]

## Team Building:

- Is there a focus on enhancing team collaboration and communication? [ 1 2 3 4 5 ]
- Do you organize team-building activities and events? [ 1 2 3 4 5 ]
- Are you fostering a positive and inclusive sales culture? [ 1 2 3 4 5 ]

## Leadership Development:

- Do you have training programs for future sales leaders? [ 1 2 3 4 5 ]
- Is executive coaching available for current leaders? [ 1 2 3 4 5 ]
- Are succession plans in place for key roles? [ 1 2 3 4 5 ]

# Process

## **Sales Process Optimization:**

- Have you mapped and streamlined the entire sales process? [ 1 2 3 4 5 ]
- Are best practices implemented for each stage of the sales cycle? [ 1 2 3 4 5 ]
- Are you actively reducing bottlenecks and inefficiencies? [ 1 2 3 4 5 ]

## **CRM Management:**

- Have you selected and implemented the right CRM system? [ 1 2 3 4 5 ]
- Is the sales team trained on effective CRM usage? [ 1 2 3 4 5 ]
- Is data accuracy and consistency maintained? [ 1 2 3 4 5 ]

## **Lead Generation and Qualification:**

- Do you have robust lead generation strategies in place? [ 1 2 3 4 5 ]
- Are lead scoring and qualification criteria clearly defined? [ 1 2 3 4 5 ]
- Have you implemented automated lead nurturing workflows? [ 1 2 3 4 5 ]

## **Pipeline Management:**

- Are pipeline tracking and management tools set up? [ 1 2 3 4 5 ]
- Do you regularly review and update the sales pipeline? [ 1 2 3 4 5 ]
- Are you identifying and addressing pipeline gaps? [ 1 2 3 4 5 ]

## **Sales Reporting and Analytics:**

- Do you have comprehensive sales dashboards for real-time insights? [ 1 2 3 4 5 ]
- Is regular reporting on key sales performance metrics conducted? [ 1 2 3 4 5 ]
- Are you analyzing sales data to identify trends and opportunities? [ 1 2 3 4 5 ]

## **Sales SOPs (Standard Operating Procedures):**

- Are detailed sales SOPs developed for consistent execution? [ 1 2 3 4 5 ]
- Are step-by-step processes for key sales activities documented? [ 1 2 3 4 5 ]

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- Do SOPs ensure compliance with company policies and industry standards? [ 1 2 3 4 5 ]
- Are SOPs regularly updated to reflect changes in strategy or market conditions? [ 1 2 3 4 5 ]

# Plan

### **Strategic Planning:**

- Are comprehensive sales strategies developed? [ 1 2 3 4 5 ]
- Are long-term and short-term sales goals set? [ 1 2 3 4 5 ]
- Do sales strategies align with overall business objectives? [ 1 2 3 4 5 ]

### **Market Analysis:**

- Is in-depth market research conducted? [ 1 2 3 4 5 ]
- Are target market segments and opportunities identified? [ 1 2 3 4 5 ]
- Are competitor strategies and positioning analyzed? [ 1 2 3 4 5 ]

### **Sales Forecasting:**

- Are accurate sales forecasts created? [ 1 2 3 4 5 ]
- Are forecasting tools and methodologies implemented? [ 1 2 3 4 5 ]
- Are sales forecasts regularly updated and reviewed? [ 1 2 3 4 5 ]

### **Go-to-Market Strategy:**

- Are go-to-market plans for new products or services developed? [ 1 2 3 4 5 ]
- Are the best sales channels and tactics identified? [ 1 2 3 4 5 ]
- Is coordination with marketing for product launches ensured? [ 1 2 3 4 5 ]

### **Budgeting and Resource Allocation:**

- Is the sales budget created and managed effectively? [ 1 2 3 4 5 ]
- Are resources allocated efficiently to meet sales goals? [ 1 2 3 4 5 ]
- Is cost efficiency ensured in sales operations? [ 1 2 3 4 5 ]

# Scoring System & Recommendations

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**Score 1-20:** Significant gaps; immediate attention needed.

- Focus on foundational improvements.
- Consider engaging with a fractional sales leadership expert to address key gaps.

**Score 21-35:** Moderate gaps; room for improvement.

- Identify specific areas for enhancement.
- Implement targeted training and process improvements.

**Score 36-50:** Strong performance; continue to refine and optimize


- Continue optimizing and refining strategies.
- Explore advanced techniques and tools to maintain high performance.

## Next Steps


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To discuss your assessment and explore how our fractional sales leadership services can help you address these gaps, schedule a free consultation with us today!

[Click to Schedule a Free Consultation](#)



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