

The Sales Cycle Assessment

Self Version

Step One

This instrument will help you better understand your current sales situation. It is *not a test* and will not be used to evaluate you or your peers. Instead, it will be used to uncover opportunities for change. Take a few minutes to candidly respond to the following 32 statements by *circling* either **Y** = *mostly yes*, or **N** = *mostly no*. Don't engage in wishful thinking, evaluate these steps in terms of what really happens now. If you are unsure about your answer to a statement or do not know, circle the "?". Please respond to all the statements:

Circle one for each question

- | | | | | |
|--|---------------|---------------------|---------------------|---|
| 1. My sales "territory" (my responsibility area) is clearly defined. | (1) | Y | N | ? |
| 2. My "territory" has clear boundaries with other "territories". | (1) | Y | N | ? |
| 3. I feel that my "territory" has adequate sales opportunities. | (1) | Y | N | ? |
| 4. The market for our products and services is clearly defined. | (1) | Y | N | ? |
| 5. I have reviewed and have records including the names and other necessary specifics of all the potential accounts in my "territory". | (2) | Y | N | ? |
| 6. I fully understand why our customers buy from us now. | (2) | Y | N | ? |
| 7. The approach we take to selling in the market is methodical and based on a clear overall plan. | (2) | Y | N | ? |
| 8. We frequently stop and review how well we are doing as a sales team. | (2) | Y | N | ? |
| 9. I have a system for reviewing the potential businesses in my territory using a predetermined "most likely to buy" criteria. | (3) | Y | N | ? |
| 10. I have an adequate written target list of potential customers in my territory that I can call on. | (3) | Y | N | ? |
| 11. My sales plan includes clear and realistic targets and quotas. | (3) | Y | N | ? |
| 12. I know about how many companies I will need to initially contact in order to make one sale (my contact to close ratio). | (3) | Y | N | ? |
| 13. I have well organized records including written list of the names, titles and phone numbers of the high potential customers in my territory. | (4) | Y | N | ? |
| 14. I feel prepared and capable when initiating cold calls. | Turn the page | N | ? | |

Continue on next page

15. I can succinctly speak to the capabilities of my company in a way that impresses prospective customers and allows me to advance. (4) **Y** **N** ?
16. I know how to properly explore needs including asking the “high gain” questions that will surface unmet needs. (4) **Y** **N** ?
17. I am able to position my products and services favorably against my competitors in each major potential and existing account. (5) **Y** **N** ?
18. I know what questions to ask to "qualify" a company's potential interest in my services and products. (5) **Y** **N** ?
19. I have good records of potential customers that I have talked to with identified strong interest in our services. (5) **Y** **N** ?
20. I know how to uncover the needs of a potential customer. (5) **Y** **N** ?
21. I think I know how to overcome objections and present the benefits of all of my products and services. (6) **Y** **N** ?
22. I am usually able to get to the person who makes the decision. (6) **Y** **N** ?
23. I have several good closing statements that I use to get the sale. (6) **Y** **N** ?
24. When I don't get the business, I usually can learn the reasons why they didn't buy from me. (6) **Y** **N** ?
25. A written schedule and/or plan for servicing and maintaining relationships with my accounts exists. (7) **Y** **N** ?
26. I have cultivated a good working relationship with my customers. (7) **Y** **N** ?
27. When there is a problem with one of my accounts, I am usually able to fix it and follow-up to the customer's satisfaction. (7) **Y** **N** ?
28. Once I get an account, I don't lose it; they keep buying from me. (7) **Y** **N** ?
29. I use my working relationship with my customers to learn about their future plans and strategize ways of getting more business. (8) **Y** **N** ?
30. After doing business with a customer for a while, I am able to generate even more business from them. (8) **Y** **N** ?
31. I have the right "add-on" products and services that I can use to get more business volume from existing customers. (8) **Y** **N** ?
32. I spend enough time with my existing customers (outside of taking new orders) building and maintaining a strong relationship. (8) **Y** **N** ?

Step Two



Now that you have completed the above 32 statements, focus on the details:

A. The three above statements that I feel are the *strength* of my selling cycle are: numbers ____, ____, and ____. Explain why:

B. The three above statements that *most need to be addressed* in my selling cycle are numbers ____, ____, and ____. Explain why:

Scoring Your SCA-Self

First calculate your *total sales cycle score* from the answers you circled on the previous pages. Give yourself 3 points for each "Y" to all questions. No points are awarded for "N" answers or question marks. Next, evaluate the individual steps of your cycle.

Your total selling cycle score is:

Use the following scale to interpret what your score means:

<i>If you scored:</i>	<i>You:</i>
86-96	Are well prepared to work the whole sales cycle
75-85	Are working much of the sales cycle, but a more complete cycle would help you get better results
60-74	Have significant holes in your sales cycle that are greatly impeding your productivity
Under 60	Need major changes - Let's get to work! A well defined sales cycle will help you significantly improve your productivity

Review your responses to help you evaluate your sales cycle. This will help you to determine where to focus your improvement efforts. Be prepared to discuss the above.

For more information about this and other productivity improving tools or for information on High Impact sales training programs, contact James Haupt Associates (602) 443-9615