SMALL BUSINESS SALES ASSESSMENT TOOL

● **Instructions:** Please answer each question the best of your ability. You may want to loop in key business development staff in the conversation.

📈 Sales Process Evaluation: ◀◀

▶ How well-defined is your current sales process?

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▶ How does your sales cycle length compare to industry benchmarks?

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▶ What is your conversion rate at each stage of the sales process?

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▶ How consistently do your salespeople follow your defined process?

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▶ How efficiently are you using tools or resources to streamline your sales process?

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🕐 Data Analytics Usage ◀◀

▶ To what extent are you using data analytics to inform your sales strategy?

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▶ How effectively are you tracking and analyzing key performance indicators?

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▶ How well are you leveraging data to improve your sales outcomes?

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▶ How comprehensive is your data collection and analysis process?

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▶ How effectively are you acting on insights derived from your data?

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⊕ Customer-Centricity ◀

▶ How well do you understand your customers' needs and pain points?

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▶ How tailored are your sales approaches to address specific customer needs?

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▶ How well can your sales team articulate your ideal customer profile?

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▶ How effective are your processes for gathering and acting on customer feedback?

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▶ How well do your products or services align with your customers' needs and pain points?

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Buyer Personas

▶ How well-defined are your buyer personas?

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▶ How frequently do you update and refine your buyer personas based on new data and insights?

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▶ To what extent does your sales team tailor their approach based on different buyer personas?

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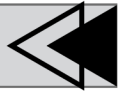▶ How effective are your processes for gathering and acting on customer feedback?

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▶ How well do you use buyer personas to inform product development and service offerings?

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🔐 Technology Integration: ◀◀

▶ How effectively are you using your current sales technologies?

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▶ How well-trained are your team members on using your sales technologies?

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▶ How well do your sales technologies integrate with each other and with other business systems?

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▶ What is the adoption rate of your sales technologies among your team?

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How effectively are you using your CRM system?

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Post-Sale Activities :

How robust is your current approach to post-sale customer engagement?

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How effective are your strategies for upselling and cross-selling?

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How well do you leverage customer feedback to improve your products and services?

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How effective is your customer onboarding process?

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▶ How strong are your customer retention and loyalty programs?

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👥 Sales Team Performance : ◀◀

▶ How effectively do you identify and address skill gaps in your sales team?

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▶ How well are you tracking key performance indicators for individual salespeople and the team as a whole?

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