



Company _____ Participants _____ Date _____

Evaluation Topics	Yes	No	N/A
Setting Your Market Penetration & Sales Performance Expectations			
Company is meeting sales objectives.			
Company is winning "their fair share" of the potential market.			
Company is achieving year-over-year sales growth.			
Exploiting PESTLE Opportunities (Political, Economic, Social, Technology, Legal, Environmental)			
PESTLE Indicators are evaluated and plans are in place for exploiting opportunities.			
PESTLE Indicators are evaluated and plans are in place for mitigating threats, risk or disruptions.			
Aligning Your Products & Services to Client Business and Market Needs			
There is a significant and sustainable <u>business need</u> for your offering(s) within your targeted market.			
Your product or service is competitive against your top 5 contenders within your targeted market.			
Pricing is fair market in comparison to the top 5 competitors. Price differences (+-) are defensible.			
Selecting/Validating Your Target Market			
Your targeted market is identified and marketing & sales efforts are concentrated on: <ul style="list-style-type: none"> • Defined geographies where you are viewed by your targeted customer as logistically favorable. • Defined industries and size (ie SMB, Enterprise) where you are viewed as being a top 5 contender and having subject matter expertise that aligns with their industry specific needs. • Targeted accounts that are likely to have a business need for your offerings. • You are targeting the <u>business level</u> decision makers whom you know will perceive a competitive advantage by using your product or service. 			
Competitive Messaging			
Your marketing and sales team is utilizing a positioning message that describes the business competitive advantage that your organization is <u>uniquely</u> positioned to provide. This message aligns to your targeted business level decision makers.			
Your website complies with search quality rating program expectations (Google 2019).			
You are following industry spend benchmarks for marketing and advertisement.			
Applying Sales & Marketing Methodology			
Your lead generation program includes online chat conversions, web monitoring conversions, blogging conversions, networking conversions, teaching events conversions, corporate newsletter conversions, social media conversions, email campaign conversions and ultimately email & telephone call conversions.			
You have a method in place for developing business cases for all competitive selling situations.			
You have a method in place for constructing and presenting compelling proposals to all stakeholders.			



You have a method in place for closing and negotiating timing, price and competitive threats.			
MARKETING AND SALES STRATEGY CHECKLIST			

Evaluation Topics	Yes	No	N/A
Sales & Marketing Management Procedures (the methods for daily goal setting, transactional coaching, driving sales accountability and systemic hiring/upgrading the sales team)			
Sales manager has the will, strengths and skills to manage the team to successful plan accomplishment.			
Sales goals are clearly defined for all sales team members. Requirements for sales performance is understood and adhered to by all sales team members.			
Sales and marketing team is assigned specific geographic, industry, size, stakeholder or account responsibilities.			
Compensation aligns to sales results.			
Sales planning occurs daily (plan for the day, measurement for success and assistance required).			
Sales coaching is available pre-, during and post-key client interactions.			
Company leadership (executive, CFO, operational, product, customer service, legal) is available to assist sales in key deal pursuits.			
Sales accountability is measured and discussed daily, weekly and monthly.			
Corrective action is managed effectively for underperformance within clearly defined parameters and timelines.			
Sales team development occurs for closing skill gaps and year-over-year improvement.			
Proactive sales recruiting is occurring for 1) immediately filling all unfilled positions 2) replacing un-coachable or un-trainable and 3) continuously upgrading your talent pool by hiring better salespeople than your current best.			
Getting The Right Team In Place/Closing Skill Gaps			
Your sales & marketing team is fully staffed with fully engaged and skilled resources for:			
• Lead Generation			
• Business Case Development/Solution Alignment (Consultative Selling)			
• Presentations & Closing			
• Sales Negotiations			
Prioritized Action Items			

