

Strategic Alignment

Are goals aligned with company objectives and measured with the right KPIs?

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Are territories balanced by potential, workload, and geography?

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Are customers segmented properly (priority, revenue tiers, potential, etc.)?

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People & Performance

Is the team structured efficiently with clear roles and reporting?

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Are reps productive in terms of visits, time management, and outcomes?

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What skill gaps exist across the team (selling, prospecting, knowledge)?

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Are managers effectively coaching and conducting performance reviews?

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Process

Is the CRM updated consistently by the field team?

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Are sales processes standardized and consistent across reps?

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Are routes planned in advance?

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Do reports drive decision-making (or are they busy work)?

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Technology

Do tools improve rep efficiency?

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Is mobile access and field enablement fully supported?

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Are tools widely and easily used by field reps?

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Customer Engagement

Do reps maintain consistent visit frequency and account penetration?

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Do customers feel valued and well-served by reps?

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Are retention and growth metrics tracked and improving?

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Financial Performance

Is the return on investment of sales visits measured?

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Do most reps meet or exceed quota consistently?

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Are territories or segments measured by profitability?

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Culture

Do all individuals involved in the sales process communicate effectively?

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Does compensation motivate the right sales behaviors?

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Is the team adaptable and open to new tools or processes?

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