



Sales Analysis Data Sheet

Answer all of the following items. You may use a separate page if you label your responses by number. When finished, please fax to 817-573-5806. Thank you.

1. Name of Company: _____

Address: _____

City, State, ZIP: _____

Type of business/Industry: _____

2. Contact Name: & Title: _____

Phone: _____

Email address: _____

3. Describe the title, type(s) of selling you do and the number of salespeople engaged in each. One example is listed.

Title	Type of Selling	Number of salespeople
<i>"Relationship manager"</i>	<i>Outside direct sales</i>	25

4. Where does your sales organization most need help? What's your current challenge?

5. Selling Environment Analysis

Although the following factors apply to most sales situations, not all are equally important to specific industries, companies, or even branches within a company. Corporate culture, local management priorities and marketing strategies produce a unique selling environment.

Please consider the following abilities and rate their importance to the specific type of selling you do. Check the box under the correct column.

	Critical To Job	Somewhat Important To Job	Not Important	Detrimental To Job
1. Initiates contact with current or potential customers				
2. Tolerates change; works well under pressure				
3. Detail conscious; analyzes information; highly organized				
4. Spontaneous; thinks well on feet; doesn't get bogged down in details				
5. Comfortable speaking in front of groups				
6. Empathetic; concerned with customer feelings; closing sales NOT as critical as opening relationships				
7. Doesn't hesitate telling others she/he is in sales				

	Critical To Job	Somewhat Important To Job	Not Important	Detrimental To Job
8. Not intimidated calling on business owners or wealthy prospects				
9. Networks with business associates				
10. Expected to sell to friends and family members				
11. High level of physical energy; expects to work long hours				
12. Sets sales goals and works daily to achieve them				
13. Uses the telephone comfortably for prospecting and closing sales				
14. Uses telephone comfortably for making appointments and follow-up				
15. Highly focused; multi-tasking is NOT expected				
16. Follows up every sale asking for referrals				
17. Independent, self-directed more than team-oriented; controls the sales process and asks for the order with little if any hesitation; strong closer				
18. Is patient with longer sales cycle of consultative selling rather than one or two call closer				

Other important abilities, skills, or attributes not included above:

Finally, of those factors you marked "Critical to the Job" prioritize the top two or three. Write the number or factor beside each.

#1 (Top Priority)

#2 (2nd Most Important)

#3 (3rd Most Important)

6. How do you measure sales performance? What numbers do you track? Do you track activities (number of calls, conversations, etc.)? Please be specific. Can you supply us with reports?

7. What CRM system do you use (if any)?

8. What sales training have you used or do you currently use?

Training Company: _____

How long has it been since salespeople completed this training?

If you have developed your own sales training, please describe its key features and outcomes.

Is your sales training (check one) face-to-face? distanced-based? Other
If Other, please describe:

If face-to-face, who delivers the training _____

Other training programs:

