



The Sales Management Checklist

6 Key Areas to Review Weekly

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MAXIMIZE THE OPPORTUNITIES IN THE WORLD AROUND YOU

Leading a sales team is a constantly evolving mission with a single objective: to meet and exceed the sales objectives for the area you're managing. It involves constant recruiting, training, motivating, and coaching of both direct reports and non-reports. It is a constantly giving position that takes nothing and gives credit where credit is due.

The variables that can impact your success as a leader are tremendous. Below is a weekly sales management checklist organized into six key areas and its purpose is to help you stay on top of the primary issues that should have your attention on a regular basis to keep you on track.

1. THE MARKET

- Do we know what is going on in our industry?
- Do we know what is going on in our market?
- Do we know what is going on in our competitors?
- Do we know what is going on in our customers?
- How are we differentiated?
- Do we have the right metrics in place to measure change?
- What does the team need to know more about?

2. GOALS AND ROLES

- Do we have defined goals for the year?
- Do we have defined sub-goals for the next 30/60/90 days based on the annual goal?
- Does everyone understand their roles and expectations in achieving the goals?
- Does my team have a plan for achieving those goals?
- Do we have the right metrics in place to measure progress?
- What can we provide to the team to help them?

3. THE PEOPLE

- Do we have the right people on the team?
- Do we know what the team is great at?
- Is the team utilizing their strengths to their full potential?
- Do we know where the team needs help?
- What tools do we need to use better?
- What activities do we need to do better?
- Do we have the right metrics in place to drive success?
- How can we coach the team for better performance?

4. OPERATIONS

- How well is our lead generation working?
- Are we easy to do business with?
- Do we have the people and processes to support the sales?
- Are we maximizing our capacity?
- Are we meeting our revenue / units / margin goals?
- What are our customers saying?
- Do we have the right business intelligence to make informed decisions?
- What can we improve this week?

5. EXTERNAL RELATIONSHIPS

- Who are our top customer?
- Who changed?
- Who can we grow in the middle 60?
- Who do we fire?
- Do we have the right strategic partners to help us add value to our customers?
- Who else need to know about what we do?
- Who can we be a resource for?

6. SELF-DEVELOPMENT

- What is my 30-60-90 day plan and is it focused on the goal?
- Who can I use as a sounding board?
- Who can hold me accountable?
- What books have I read in the last 3 months?
- How can I help others in their personal lives?
- What can we celebrate?

Your particular sales world will most likely involves a few more points or slight changes that are specific to you and your team, your company, your industry, and your market. You may be an owner in charge of the sales effort, a sales manager in a large company, or even an autonomous sales person that has to manage themselves. Regardless, the sales management function still needs to perform and consistently addressed, these are the sales management fundamentals that will put you and your team in front of the pack and help you maximize the opportunities in the world around you.

**Thank you for downloading The Sales Management Checklist: 6 Key Areas to Review Weekly
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