Sales Readiness Checklist

1. Do you know and understand the outcomes your prospects value?
2. Have you identified which opportunities you must capitalize on?
3. Do you know the characteristics of your best qualified prospects and/or what the characteristics are for unqualified prospects? Do you have a solid method for getting the right answers?
4. Do you have a clear vision for the value that Sales must bring to your organization?
5. Do you have a set of sales policies and ethical guidelines in place?
6. Do you have a system for capturing, storing, and sharing sales information?
7. Do you have an organizational policy on risk acceptance that is congruent with your sales approach?
8. Do you have insight into how your prospects buy?
9. Do you have a set of basic steps to follow that matches your prospect's buying process?
10. Do you have a plan for what to do when events deviate from that process (skew off the 'happy path')?
11. Do you have a clear, concise, crisp statement about the outcomes your product provide?
12. Do you have a communications strategy and tactical plan, including messaging that resonates, differentiates, and substantiates?
13. Do you have a customer reference(s) that provides information to substantially reduce buyer risk perceptions?
14. Do you have a social media strategy that enables installed customers to share information with prospective customers, and for you to learn about the needs of both?
15. Do you have a "roadmap" of questions to discover what you must learn, particularly for early-stage qualification?
16. Do you have a compelling sales proposal, and policies about how to integrate it into your sales process?
17. Do you have a ready-to-deploy way for your prospects to evaluate your product or service. Does that tool minimize your risks and those of your prospect?
18. Have you ensured that there will be adequate supply of your product in order to fulfill demand?
19. Have you ensured that purchase and adoption of your product will be as close to drop-dead easy as possible?
20. Do you have a strategy and tactical plan for early-stage lead generation?
21. Do you have a plan that enables ongoing replenishment of your sales pipeline?
22. Are you comfortable asking a prospective customer to place an order with you?

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Social Media Readiness

1. How does your company currently segment its market for sales? Is it by geography , industry, company size (revenue or employee), target account lists, another method or **some combination?**

2. Who are Motivators you are trying to reach? How do you identify them and build relationships with them?

3. In your organization, what prospect categories (industries) are better suited to social outreach and online sales processes? How are you reaching out to them now?

4. Are the social media-based efforts of individual sales people integrated into your core sales management and CRM systems, or are they decentralized?

5. Are you enabling digital re-use? For example, are your employees able to leverage each **other's efforts and connections** online?

6. Have you documented clear social media policies and ethical guidelines, and communicate them regularly with your staff?

Phone Call Readiness checklist

1. Name. **Have the person's name and company name—and correct pronunciations—written** down in front of you.

2. Facts. **For the individual you are planning to speak with, know at least nine facts—three** facts each about his or her industry, company, and them personally.

3. Visualization. **Visualize who you're calling, where they are, what's on their calendar, what** matters they might be dealing with right now . . .

4. Hypothesis. Have one about at least one of their strategic concerns that you can help **them solve—based on the facts in #2 above.**

5. Conversation points. What you must convey to resonate, differentiate, substantiate?

6. Outcome. What do you want from the call, including immediate next step?

7. **"Plan B." What to do if the conversation doesn't proceed along the "happy path."**

8. Key facts. What must be discovered? Know what you need to know.