



Sales Performance Measurement Process Assessment Questionnaire

If you have not already done so, we recommend that you review the [ESR Metrics Program Evaluation Guidelines](#) prior to completing this questionnaire. (Link will open a new page).

Each questionnaire page will contain one or more related questions. Please click submit after each series has been completed. This questionnaire is seven (7) pages long and will take approximately 20 minutes to complete.

Thank you.

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Contact Information

Your name:

Company Name:

Contact Email:

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Sales Performance Measurement Process Assessment Questionnaire

Part 1: About your measurement process.

2

Please briefly describe those aspects of sales performance that you measure

Please indicate for which areas of sales performance you have corresponding measures:

3

Lead acquisition

YES NO

4

Lead qualification

YES NO

5

Lead conversion

YES NO

6

Account planning

YES NO

7

Territory planning

YES NO

8

Pipeline forecasting

YES NO

9

Sales best practices

YES NO

10

Product knowledge

YES NO

11

Sales presentation

YES NO

12

Adherence to sales methodology

YES NO

13

Demonstration of knowledge from training programs

YES NO

14

Coaching effectiveness (for sales managers)

YES NO

15

Other - please describe



16

Approximately what percentage of your training or consulting engagements with your clients actually include formal performance measurement?

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Sales Performance Measurement Process Assessment Questionnaire

Part 2: Measurement Program Completeness (6 questions)

17

Do you have a formal, written Goal Setting process?

YES

NO

18

Do you have a formal written process for defining METHODS to achieve the goals?

YES

NO

19

Do you have a menu of sales performance metrics with written definitions / methods of calculation?

YES NO

20

Do you have a formal written process for selecting methods appropriate to the goals and methods defined?

YES NO

21

Do you have written guidelines for analyzing the collected metrics and a method for training either your consultants or users?

YES NO

22

Do you have written guidelines for making recommendations based upon the analysis?

YES NO

23

Do you have a formal, written process for modifying goals and methods based on measurements?

YES NO

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Sales Performance Measurement Process Assessment Questionnaire

Part 3: Process Formality

24

Does your sales performance measurement program include written or online documentation and instructions for your consultants/facilitators?

YES NO

25

Do you have a formal live or self-paced training program for your facilitators or consultants to educate them on your measurement process?

YES NO

26

Do you have a formal training program for those associates of your client who will be participating in the measurement program?

YES NO

27

Are your training and documentation materials available in electronic media?

YES NO

28

Does your sales performance measurement program include written or online documentation and instructions for your consultants/facilitators?

YES NO

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Sales Performance Measurement Process Assessment Questionnaire

Part 4: Definition of Metrics

29

Does your process have a menu or list of metrics from which metrics are chosen based upon the measurement objectives?

YES

NO

30

Approximately how many discrete metrics have you defined?

31

Are there recommended methods of collection for each metric?

YES

NO

32

Does each metric include a formula for how the metric is calculated and summarized over time?

YES

NO

33

Do you have electronic tools for collecting these metrics?

34

Do your tools interface with the client's CRM, SFA or other internal record keeping systems?

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Sales Performance Measurement Process Assessment Questionnaire

Part 5: Step by Step Process

35

In 250 words or less, please describe how you implement your training program with your clients.



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Sales Performance Measurement Process Assessment Questionnaire

CONCLUSION

36

May we contact you if we have questions? If so, please include your daytime telephone number, with area code, below.

37

In what time zone are you located?



Thank you. Please click Submit to complete your questionnaire.



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