

Hands-on support from prospecting through closing

SALES PROCESS AUDIT / DIAGNOSIS AND RECOMMENDATIONS

ILLUSTRATIVE SAMPLE | All business details, data, and targets are fictional.

ClearPath Commercial Services

Fictional facility maintenance and renovation business | Four sales representatives

01 / THE SALES PROBLEM

Opportunities lose momentum between inquiry and decision. Lead response, proposal follow-up, and CRM expectations vary by representative.

20% WIN RATE	40% WITHOUT A NEXT STEP	40% RESPONDED TO LATE
16 wins from 80 proposals decided in four weeks.	12 of 30 sampled open proposals lack a documented next action.	Sampled inquiries first answered more than one business day later.

Priority: Improve execution after a lead arrives. These fictional findings suggest process gaps; they do not prove why every sale was lost.

02 / THREE RECOMMENDED IMPROVEMENTS

01 OWN THE LEAD

Assign one rep to every inquiry. Target a first response within two business hours; answer after-hours inquiries by the next business morning. The manager checks overdue leads daily.

02 FOLLOW THROUGH ON THE PROPOSAL

Confirm the decision process and follow-up date before sending a proposal. Record an owner, next action, and due date. Follow up on days 2, 5, and 10, tailored to buyer preferences.

03 MAKE ACCOUNTABILITY A WEEKLY HABIT

Hold a 30-minute pipeline meeting using one scorecard. Review stalled deals, coach one skill gap per rep, and document measurable commitments for the next week.

PROSPECTING > DISCOVERY > PROPOSAL > FOLLOW-UP > CLOSING

Practical support at each stage, with clear ownership and consistent follow-through.

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SALES PROCESS AUDIT / SCORECARD AND ACTION PLAN

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03 / SAMPLE WEEKLY SCORECARD

Team totals for four representatives. Targets are illustrative starting points, not industry benchmarks.

Metric	Target	Actual
Inquiries answered within response target	90%	18 / 30 = 60%
Qualified discovery meetings completed	20	16
Proposals delivered	15	14
Open proposals with a dated next action	100%	21 / 35 = 60%
Follow-up tasks completed on time	95%	36 / 45 = 80%
Closed-won contract value	\$20,000	\$18,000
Win rate: rolling four weeks	25%	16 / 80 = 20%

Definitions: Qualified discovery documents need, decision process, and timing. Win rate = wins / (wins + losses) for decided proposals; exclude open deals. Contract value is not cash collected. All sample actuals fall below their proposed targets.

04 / YOUR FIRST 30 DAYS

When / owner	Action and completion evidence
Week 1 Owner / sales manager	Validate baseline data, assign lead owners, and define stages and response rules. Complete a cleaned opportunity list and one-page process guide.
Week 2 Sales reps / manager	Add dated next actions to open proposals. Practice discovery and follow-up conversations, then start the agreed workflow.
Week 3 Sales manager	Run the scorecard meeting. Inspect overdue tasks, coach performance gaps, and record one measurable commitment per rep.
Week 4 Owner / sales manager	Compare execution metrics with baseline. Review decided proposals and contract value; adjust targets and set the next 30-day priorities.

DAY 30 / A MORE CONSISTENT SALES OPERATION

Every lead has an owner. Every open proposal has a dated next step. The team uses a weekly scorecard. Evaluate win rate and revenue over the sales cycle; one month does not prove lasting improvement.

Sample scope: Diagnosis and recommendations. Technical CRM configuration and ongoing sales management are separate services.