

CEO Sales Unboxed

ScalingSales.com

Step-by-Step CEO Sales Checklist



The 6 Key CEO Sales Struggles

What follows are the six key struggles every CEO faces to growing sales and a checklist to solve them.

Start Here: Scan the following questions and pick the one that, if answered, would remove your biggest constraint on sales.

Solve this problem, then to identify the next constraint.

Repeat this process as long as you want your business to grow.

Questions? Visit me at www.scalingsales.com for more.

1

Leads



1

Do you need more leads?

Every new customer starts as a prospect. Prospects have to know why its to their advantage to speak with you. Prospects become leads when they see that you can potentially solve their problems and its to their advantage to speak with you.

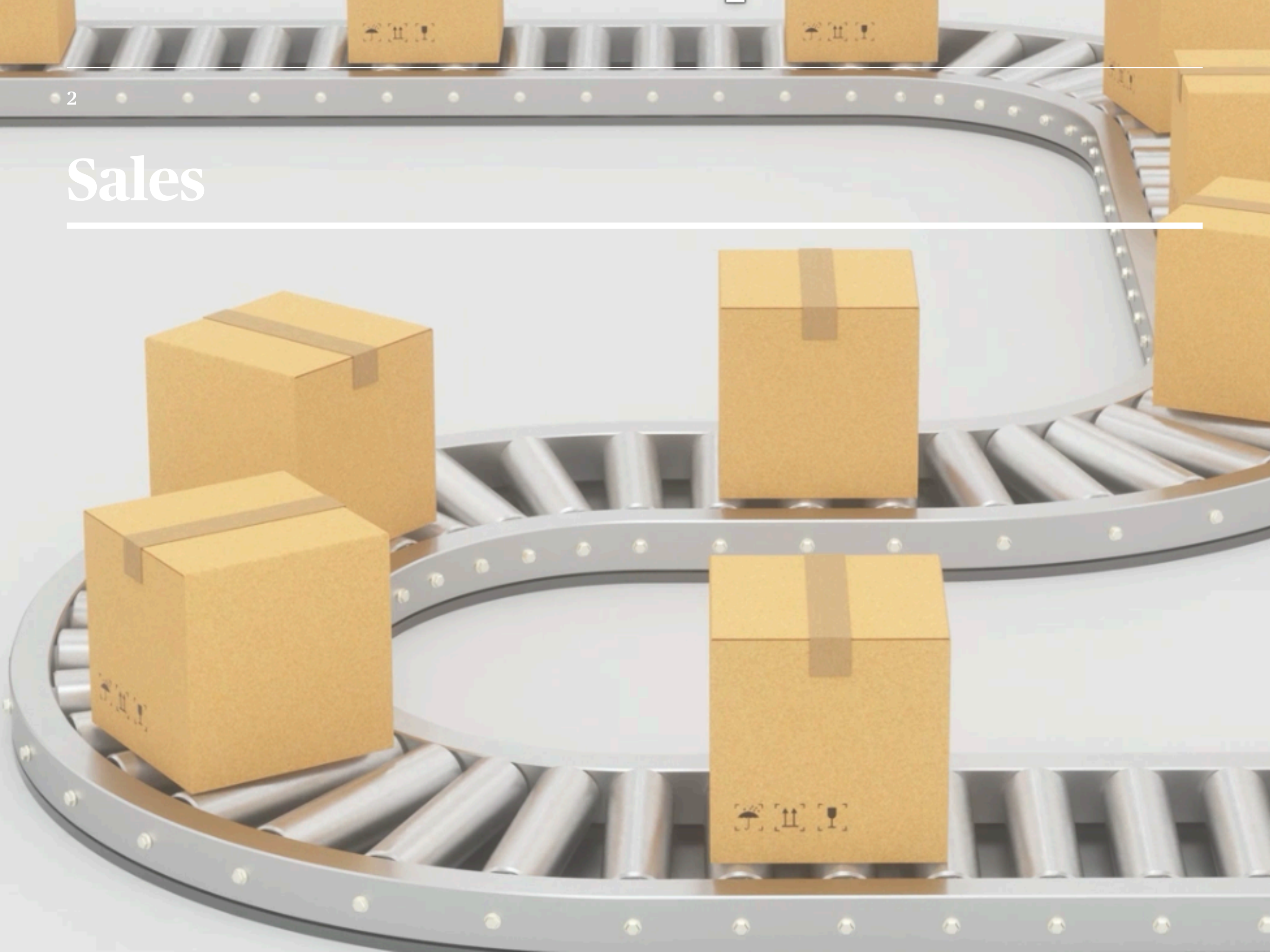
Here is the checklist you need to generate new leads and new prospects. You can use this checklist as a template to troubleshoot your current lead generation program or create a new one.

- Have you clearly defined:
 - Who you are?
 - What you do?
 - Why it matters?
 - If not, who are you, what do you do and why does it matter?
- Do you have a clear description of your ideal customer, who at your ideal customer would buy your product or service, and why?
 - If not,

- who is your ideal customer?
- What makes them your ideal customer?
- Do you have a storyline that illustrates clearly and quickly why you matter to your target customers?
 - If not, what is a compelling storyline that would attract the attention and interest of your ideal customers?
- Do you have a structured sales outreach program?
 - If not, what would a structured sales outreach program look like to you?
 - What are your 2-4 top reasons to have a structured sales outreach program?
- Do you have structured marketing inbound and outbound programs?
 - If not, what have you thought about trying? What have you considered implementing?

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Sales



2

Do you need to close more deals?

There are two parts to sales. Part one is the sales process. The sales process is made up of the criteria that identifies each stage of the decision that a prospect passes through, the steps to work through that process, and what to do and say at each stage to advance the deal to the next stage.

Part two is having the sales conversations and communications at each stage.

Here is the checklist that will ensure you have both parts of sales in place:

- Do you have a structured sales process with defined sales stages based on what the customer is telling you about where they are in the decision process?
 - If not, what do you think the logical stages are that your buyers would need to progress through to make a decision to buy from you?
- Do you know what to do and say at each stage of the process to advance deals to the next stage including:
 - Getting and keeping a prospect's attention for the duration of the sales process?
 - Getting prospects to trust you?
 - How to justify purchasing your products or services to themselves, their peers and their superiors?
 - Taking action to decide to buy from you, implement your solution and reap the benefits of it?
 - If not, what have you thought to implement around these items?
- Do you have structured call-planning process to prepare for upcoming sales calls that includes planning three moves ahead to influence the decision process?

Find, Hire & Pay Salespeople



3

How do you find, hire & pay salespeople?

Salespeople should sell and be selling by helping your potential customers solve their problems with your solutions.

The first step in creating a sales team is to find, hire and create a compensation plan for salespeople. Here is your checklist to do this:

- Finding Salespeople
 - Do you have a list of the skills and attributes of a salesperson who would be effective in selling your solution to your clients? If not, what would you put on that list?
 - Do you have a strategy to find and screen for the right people? If not, what are your thoughts on how to accomplish this?
- Hiring Salespeople
 - Do you have a strategy to screen and interview for the right people? If not, what are your thoughts on how to accomplish this?
- Do you have list of questions that screen salespeople for their ability to perform both the hard and soft skills of sales?
- How do you evaluate salespeople for their culture fit?
- Paying Salespeople
 - Do you have a sales compensation plan that incentivizes salesperson performance and protects the interests of the company and your clients?

Onboard, Coach, & Fire Salespeople



4

How do you onboard, coach & fire Salespeople?

Salespeople are expensive resources. Often they're the only resource in your company that are compensated on their direct financial contributions to your company. It typically takes months or sometimes more than a year before they break-even financially and are contributing to both revenues and profits.

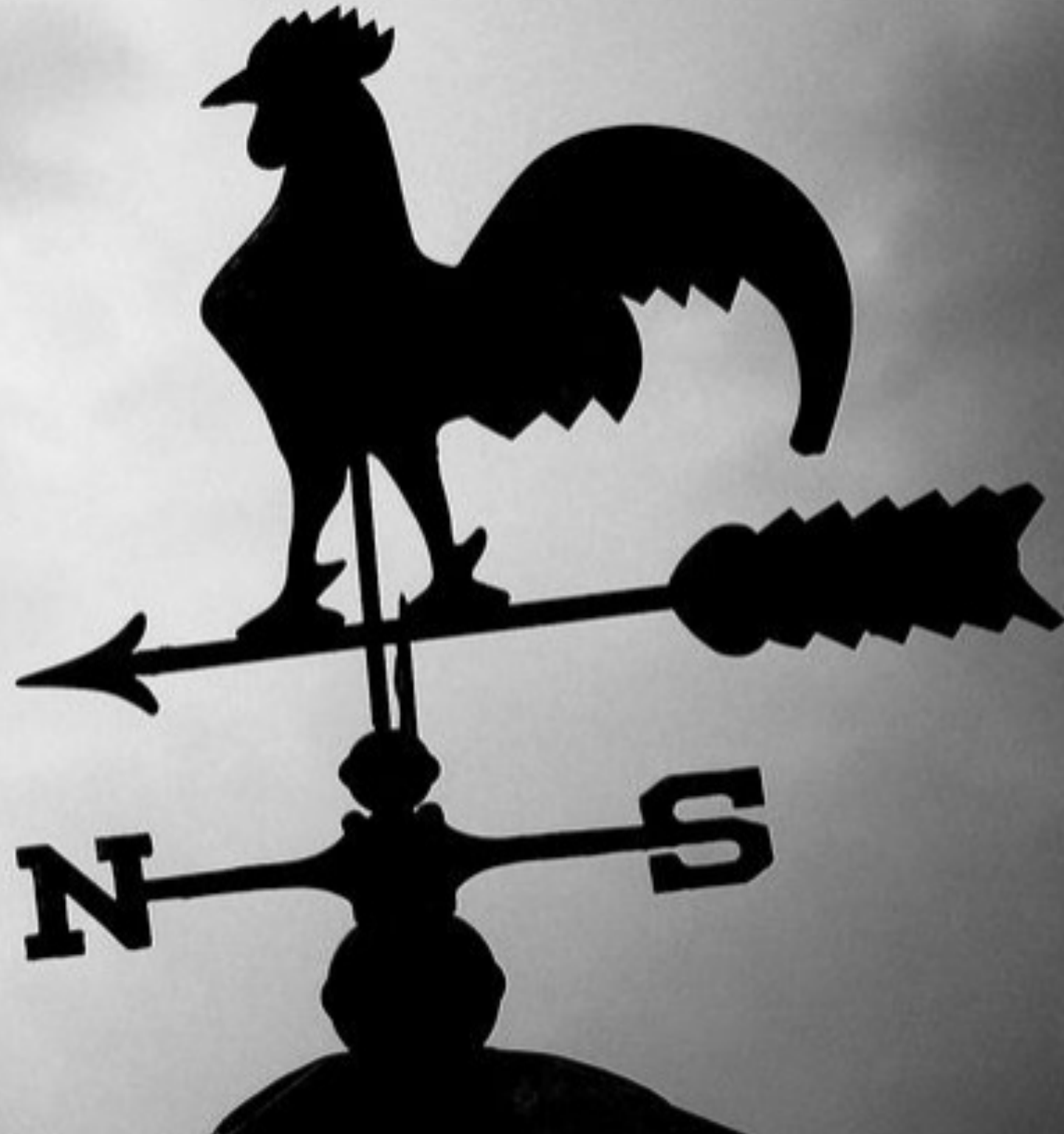
This checklist will help you shorten the time to a salespersons profitability and reduce the financial risk to you when they're not performing and protect you from the cost of them not-performing.

- Onboarding
 - Do you have a structured onboarding plan addressing the following:
 - First two weeks day by day?
 - First month?
 - First quarter?
- Coaching & Accountability
 - Do you have a structured weekly and monthly cadence of meetings, public and private, coaching and accountability?

- Letting Under-Performers Go
 - Are salespeople fired for not performing? y/n?
 - Do you have a plan to coach under trajectory salespeople to get on trajectory to accomplish their quota or to move them out of the team?

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Forecasts & Predictability



5

How do you forecast sales for this month, this quarter & this year?

The only way to know if an individual sales person or a sales team will miss, meet or exceed their numbers is with an accurate sales forecast and pipeline.

If the sales process in step 2 is set-up properly, you can create an accurate pipeline and forecast based on the criteria for each sales stage with the customer telling you where they are in the sales process, not based on the best guesses of your salespeople and leadership.

It's better to know than to guess and be wrong.

- Do you have a sales pipeline and forecast that is accurate to +/- 10% based on what the customer is telling you, not what the salespeople are telling you?
 - Do you know your overall average sales cycle?
 - Do you know your sales cycle for each type of sale, product or solution to each of the markets and customer types that you sell into?
 - What is your criteria for stalled deals? When do you remove stalled deals from the pipeline?

- Do you track individual and the sales teams performance in the three key metrics of % of quota attained, close rate and average days in stage for each stage of the sales process?
 - Do you track these individual and team metrics for each product or solution you sell, to each of the markets and customer types that you sell to?

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Sales Leadership



6

How do you hire and manage a sales leader?

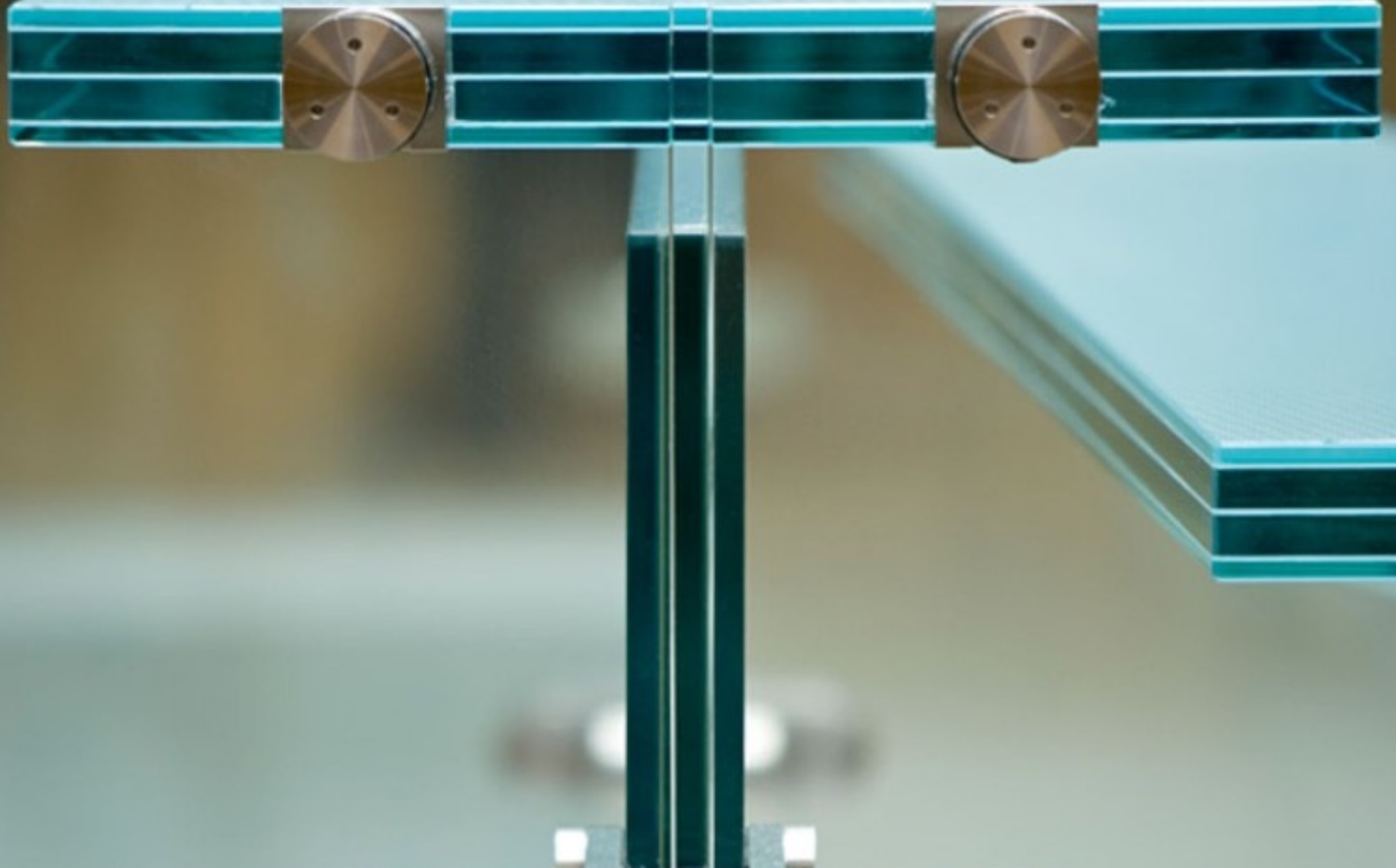
The most effective sales leaders do three things: 1) They own the functions and outcomes of sales like its their business. The buck stops with them. 2) They reality check salespeople and management when what people are feeling and saying doesn't match what prospects and clients are experiencing. 3) They plan ahead, share their plans, get buy-in, and advance, individuals and sales teams daily and weekly, forward on those plans.

Here are the simple questions you need to answer before you hire your first or next sales leader:

- Are you ready to hire someone else to own the day-to-day responsibilities of leading the sales team?
- Do you have a plan to recruit, hire and train them?
- Do you have a structured weekly and monthly cadence of meetings for coaching and accountability with them?
- Do you know what success if for them?

- Do you know how to pay them to incentive them to performance and protect the company and your customers for non-performance?

Your Advantage



Your Advantage

The problem as I see it is that CEOs and their teams lack a simple, clear resource to identify the key issues getting in the way of sales, how to solve them and the resources to do it.

My idea to solve this problem is to clearly identify the root cause or causes of sales issues, clarify the outcomes you want from your company and teams, create an efficient plan to get to your outcomes, execute on the plan and coach your people to accountability to do their part.

In order for you and your team to benefit, you will need to have and apply effective frameworks to diagnose the issues, apply broad and specific experience to create a customized plan for your business, and then have the knowledge, expertise, overview perspective and pattern matching to implement your plan and provide course correction when needed.

The advantage to you is that as you apply this checklist, you and your team will attract more prospective customers, win more deals, have more control over sales, revenues will grow and your business will expand.

If you think this might be for you, I've developed done-with-you and done-for-you programs for CEOs to get control of revenue.



The next steps are, 1) Schedule a call with me at www.scalingsales.com, 2) On our call, we'll diagnose what you feel are the core issues around sales. 3) I'll create a Scope of Work that outlines your issues, how we will resolve them and the price to do so. And then, if you feel this is for you, we'll solve your sales issues.

I'm looking forward to our call!

Steve Johnson
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