



**BillKlissCo**  
Opening Doors to Increase Sales

## **Sales and Marketing Assessment**

**2014 Strengths & Constraints**

**Bill Kliss Consulting**

**Prepared by:**

**Accountability Partners**



## This Report Contains...

- 1. METHODOLOGY:** How to use the Sales Baseline Report to get the most benefit.
- 2. SALES BASELINE REPORT CARD™:** A 1-page summary that includes your overall Sales Performance Index (SPI) and your perceived capabilities and constraints.
- 3. DEGREE OF IMPACT RESULTS:** Identifies your High-Impact/High Performance ("Green Zone") and High Impact/Low Performance ("Red Zone") areas.
- 4. STRATEGIC PERFORMANCE COMPARISONS:** A comparison of your organization's performance to the thousands of organizations in the assessment database.
- 5. STATEMENT FREQUENCY RESPONSES:** Shows the degree of consensus or polarity of responses to each statement.
- 6. COMMENTS:** Provides additional anecdotal or situational information from the respondents.



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## Sales Baseline Model

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**Market Planning, Process and Tools**

**Marketing Initiatives**

**Prospecting & Qualification**

**Sales Processes**

**Sales Staff Performance and Effectiveness**

**Sales Staff Management and Effectiveness**

**Compensation**

**Sales and Marketing Infrastructure (System and Tools)**

**Professional Services (and Project Management)**

**Training and Development**

**Business Management**

### Assessment and Planning Objectives

1. Discuss/debate performance issues that currently impede success.
2. Gain senior management agreement regarding prioritization of the most important **High-Impact/Low-Performance** areas.
3. Identify performance improvement goals.
4. Determine action items, due dates, and metrics for each goal.
5. Determine and allocate the necessary resources to achieve each goal.
6. Develop and communicate performance improvement plan.
7. Execute plan.



## Sales Baseline Methodology

The assessment you completed compared your organization performance against practices of the best run companies in the world. Each best practice statement in the assessment was formatted on a 6-point interval scale. Responses could range from “Strongly Agree” to “Strongly Disagree”. Participants could also select a “Don’t Know” or “Not Applicable” response. Responses from all participants have been aggregated, resulting in performance mean scores presented in this report. Mean scores relating to the six-point scale have been converted into percentages. “Don’t Know” or “Not Applicable” responses are not factored into the mean scores.

### How to use this report:

1. Review the **Report Card** and the Degree of **Impact Quadrants** to understand:
  - (a). How the participants prioritized each of the elements in the assessment.
  - (b). How they rated the performance of these elements.
2. Review the **Strategic Performance Comparison** spidergrams to compare the perceptions of your current organization to other organizations that have completed this assessment.
3. Use the **Statement Frequency Responses** to see how participants individually rated performance, particularly in the high-impact areas. Is there centrality or polarity?
4. Use the **Comments** section to obtain more elaboration from the respondents regarding high or low performing areas.
5. Identify and prioritize your key performance improvement opportunities.
6. Develop a performance improvement plan.
7. Execute your plan. (Provide Status updates to your constituents and other key constituencies.)
8. Take the assessment again in approximately 9 to 12 months to determine performance progress in targeted improvement areas.

### This report is designed to reflect:

1. **Priorities:** The performance areas the participants have identified as having the greatest impact on the organization’s success.
2. **Performance:** The participant’s perception of the organization’s current performance.
3. **Comparison:** How the organization performance compares between all evaluating groups.
4. **Consensus:** The level of agreement or disagreement that exists among the participants regarding performance in key areas.



# Sales Baseline Report Card

Your Sales Performance Index™:

**58**

Your Prior Year SPI™:

**N/A**

## Capabilities

### Sales Statements

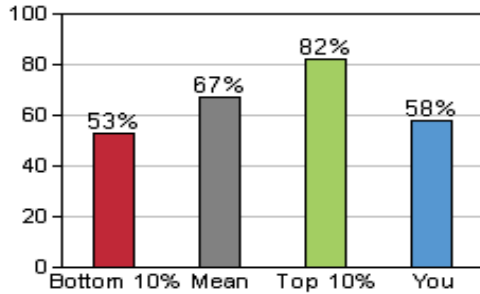
|              |     |
|--------------|-----|
| Processes    | 61% |
| Perfmnce     | 62% |
| Compensation | 64% |

## Constraints

### Sales Statements

|          |     |
|----------|-----|
| Planning | 51% |
| Mgmt     | 49% |

Sales Baseline Benchmark SPI Comparison



Total Distribution: 12  
Percentage: 100%

Total Participants: 12

| Group Name       | Participants |
|------------------|--------------|
| Sales Staff      | 7            |
| CEO              | 1            |
| Management Staff | 4            |

## Capabilities and Constraints Definitions

Capabilities are defined as those service categories that are view as “High-Impact” (important to the customer) and “High-Performing” (generally perceived as satisfactory performance).

Constraints are defined as those service categories that are view as “High-Impact” (important to the customer) and “Low-Performing” (generally perceived as less satisfactory performance).



**Sales Baseline**  
**Degree Of Impact Results**  
**Sales Statements**



| All Participants |                |       |
|------------------|----------------|-------|
| No.              | Category       | Score |
| 1                | Planning       | 51%   |
| 2                | Processes      | 61%   |
| 3                | Perfmnce       | 62%   |
| 4                | Mgmt           | 49%   |
| 5                | Compensation   | 64%   |
| 6                | Qualifying     | 61%   |
| 7                | Initiatives    | 61%   |
| 8                | Infrastructure | 56%   |
| 9                | Bus. Mgmt      | 66%   |
| 10               | Training       | 47%   |
| 11               | Prof Serv      | 61%   |

**This chart illustrates the actual spacing of the elements on the Impact axis.**



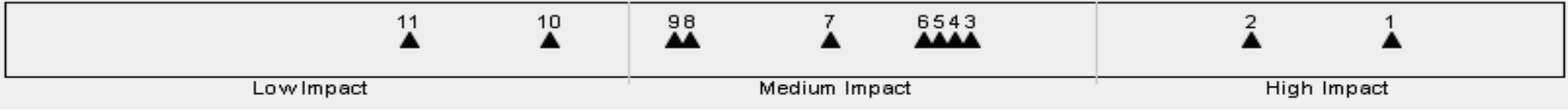


**Sales Baseline**  
**Degree Of Impact Results**  
**Sales Statements**



| Sales Staff |                |       |
|-------------|----------------|-------|
| No.         | Category       | Score |
| 1           | Planning       | 55%   |
| 2           | Compensation   | 51%   |
| 3           | Perfmnce       | 72%   |
| 4           | Initiatives    | 57%   |
| 5           | Mgmt           | 53%   |
| 6           | Qualifying     | 66%   |
| 7           | Processes      | 66%   |
| 8           | Training       | 50%   |
| 9           | Infrastructure | 55%   |
| 10          | Prof Serv      | 60%   |
| 11          | Bus. Mgmt      | 68%   |

**This chart illustrates the actual spacing of the elements on the Impact axis.**



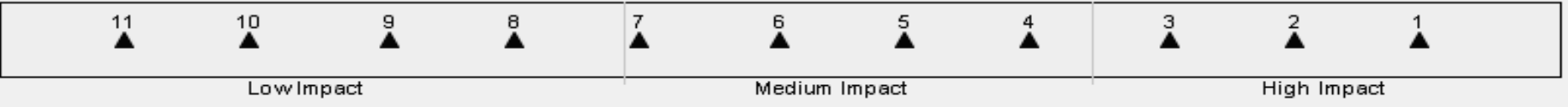


**Sales Baseline**  
**Degree Of Impact Results**  
**Sales Statements**



| CEO |                |       |
|-----|----------------|-------|
| No. | Category       | Score |
| 1   | Perfmnce       | 57%   |
| 2   | Processes      | 70%   |
| 3   | Qualifying     | 58%   |
| 4   | Mgmt           | 63%   |
| 5   | Infrastructure | 66%   |
| 6   | Planning       | 55%   |
| 7   | Initiatives    | 71%   |
| 8   | Bus. Mgmt      | 63%   |
| 9   | Prof Serv      | 75%   |
| 10  | Training       | 52%   |
| 11  | Compensation   | 81%   |

**This chart illustrates the actual spacing of the elements on the Impact axis.**





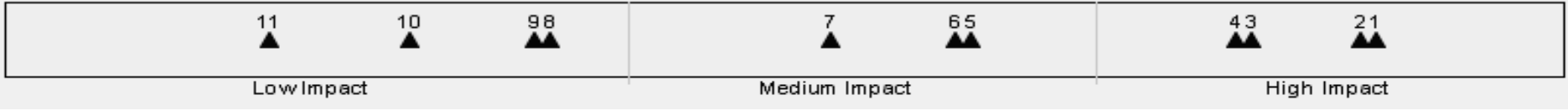


**Sales Baseline**  
**Degree Of Impact Results**  
**Sales Statements**



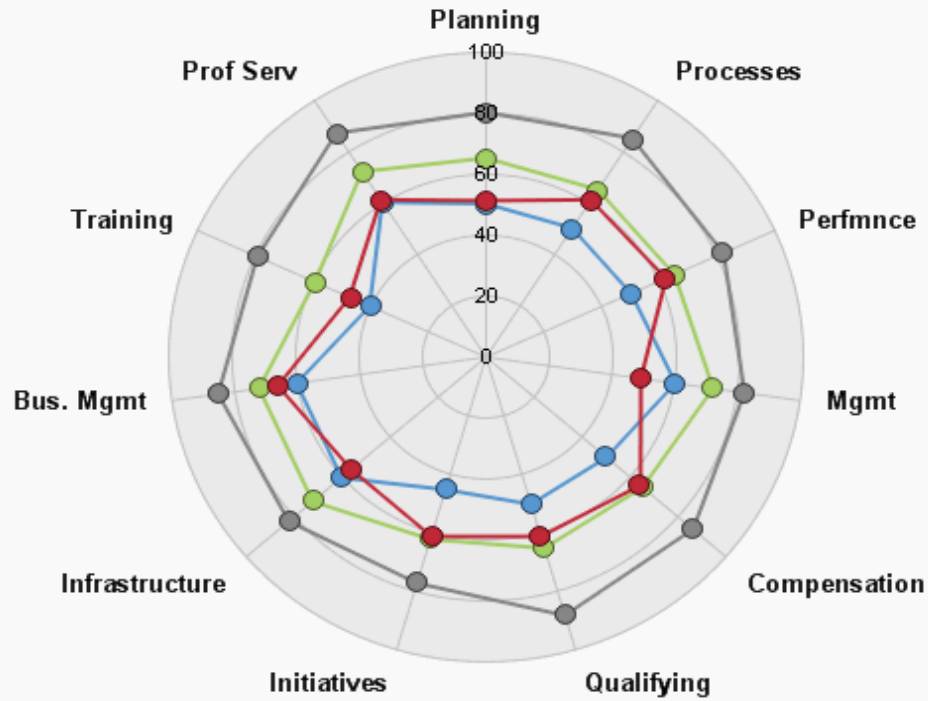
| Management Staff |                |       |
|------------------|----------------|-------|
| No.              | Category       | Score |
| 1                | Perfnnce       | 47%   |
| 2                | Processes      | 52%   |
| 3                | Mgmt           | 39%   |
| 4                | Bus. Mgmt      | 64%   |
| 5                | Planning       | 45%   |
| 6                | Infrastructure | 55%   |
| 7                | Qualifying     | 52%   |
| 8                | Compensation   | 81%   |
| 9                | Initiatives    | 65%   |
| 10               | Training       | 40%   |
| 11               | Prof Serv      | 59%   |

**This chart illustrates the actual spacing of the elements on the Impact axis.**





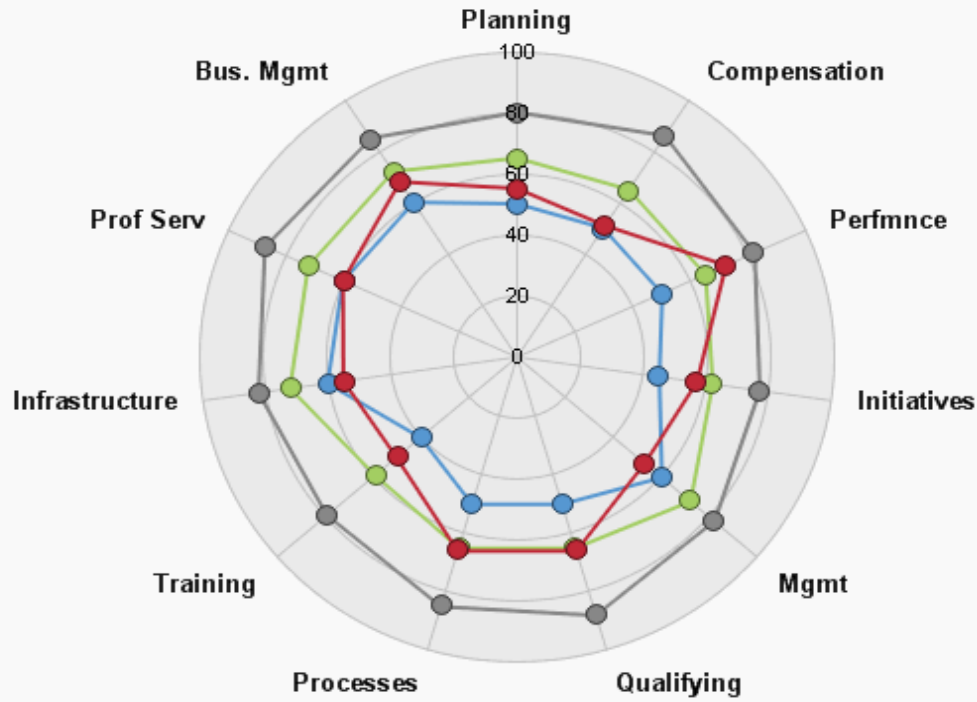
**Sales Baseline**  
**Performance Comparison**  
**Sales Statements**



| All Participants |     |      |     |     |
|------------------|-----|------|-----|-----|
| Category         | Top | Mean | Btm | You |
| Planning         | 80% | 65%  | 50% | 51% |
| Processes        | 85% | 65%  | 50% | 61% |
| Perfmnce         | 82% | 65%  | 50% | 62% |
| Mgmt             | 82% | 72%  | 60% | 49% |
| Compensation     | 86% | 65%  | 50% | 64% |
| Qualifying       | 88% | 65%  | 50% | 61% |
| Initiatives      | 77% | 62%  | 45% | 61% |
| Infrastructure   | 82% | 72%  | 60% | 56% |
| Bus. Mgmt        | 85% | 72%  | 60% | 66% |
| Training         | 79% | 59%  | 40% | 47% |
| Prof Serv        | 87% | 72%  | 60% | 61% |



**Sales Baseline**  
**Performance Comparison**  
**Sales Statements**

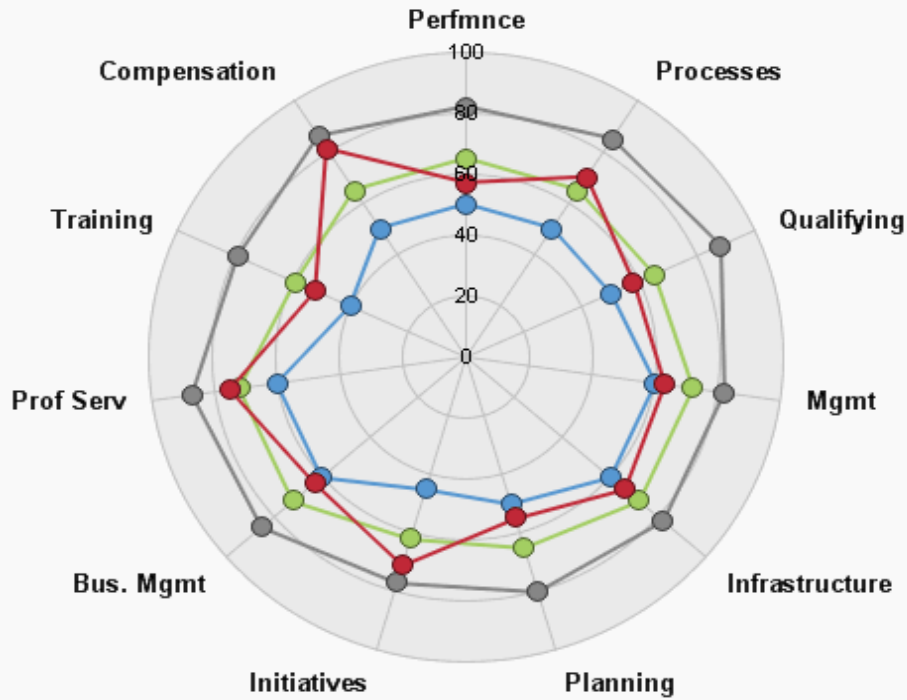


● Top 10%  
 ● Overall  
 ● Bottom 10%  
 ● You

| Sales Staff    |     |      |     |     |
|----------------|-----|------|-----|-----|
| Category       | Top | Mean | Btm | You |
| Planning       | 80% | 65%  | 50% | 55% |
| Compensation   | 86% | 65%  | 50% | 51% |
| Perfmnce       | 82% | 65%  | 50% | 72% |
| Initiatives    | 77% | 62%  | 45% | 57% |
| Mgmt           | 82% | 72%  | 60% | 53% |
| Qualifying     | 88% | 65%  | 50% | 66% |
| Processes      | 85% | 65%  | 50% | 66% |
| Training       | 79% | 59%  | 40% | 50% |
| Infrastructure | 82% | 72%  | 60% | 55% |
| Prof Serv      | 87% | 72%  | 60% | 60% |
| Bus. Mgmt      | 85% | 72%  | 60% | 68% |



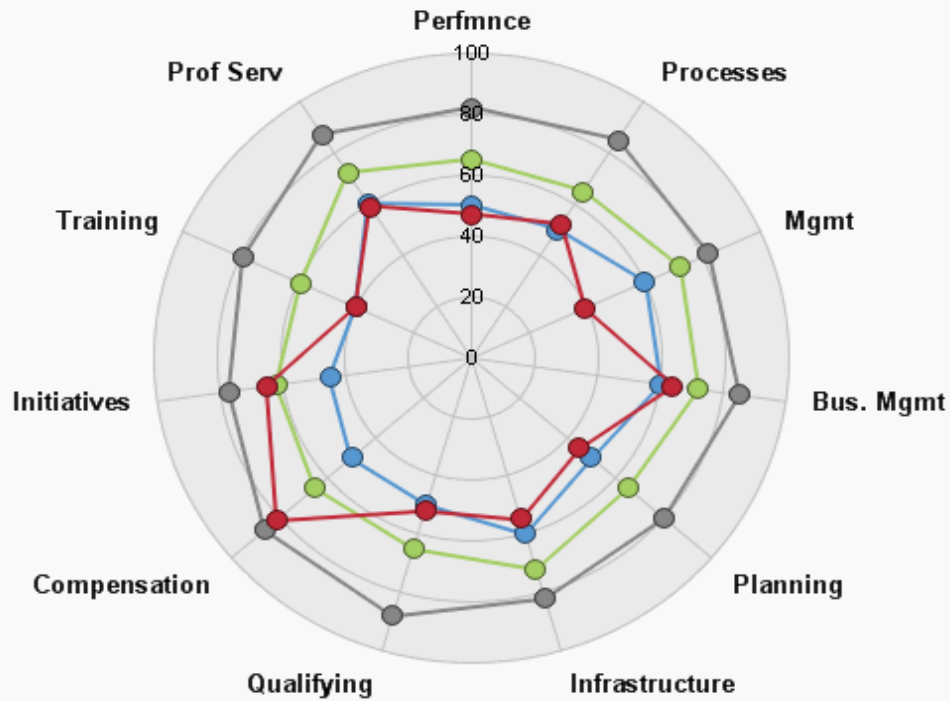
**Sales Baseline**  
**Performance Comparison**  
**Sales Statements**



| CEO            |     |      |     |     |
|----------------|-----|------|-----|-----|
| Category       | Top | Mean | Btm | You |
| Perfmnce       | 82% | 65%  | 50% | 57% |
| Processes      | 85% | 65%  | 50% | 70% |
| Qualifying     | 88% | 65%  | 50% | 58% |
| Mgmt           | 82% | 72%  | 60% | 63% |
| Infrastructure | 82% | 72%  | 60% | 66% |
| Planning       | 80% | 65%  | 50% | 55% |
| Initiatives    | 77% | 62%  | 45% | 71% |
| Bus. Mgmt      | 85% | 72%  | 60% | 63% |
| Prof Serv      | 87% | 72%  | 60% | 75% |
| Training       | 79% | 59%  | 40% | 52% |
| Compensation   | 86% | 65%  | 50% | 81% |



**Sales Baseline**  
**Performance Comparison**  
**Sales Statements**



| Management Staff |     |      |     |     |
|------------------|-----|------|-----|-----|
| Category         | Top | Mean | Btm | You |
| Perfmmce         | 82% | 65%  | 50% | 47% |
| Processes        | 85% | 65%  | 50% | 52% |
| Mgmt             | 82% | 72%  | 60% | 39% |
| Bus. Mgmt        | 85% | 72%  | 60% | 64% |
| Planning         | 80% | 65%  | 50% | 45% |
| Infrastructure   | 82% | 72%  | 60% | 55% |
| Qualifying       | 88% | 65%  | 50% | 52% |
| Compensation     | 86% | 65%  | 50% | 81% |
| Initiatives      | 77% | 62%  | 45% | 65% |
| Training         | 79% | 59%  | 40% | 40% |
| Prof Serv        | 87% | 72%  | 60% | 59% |



## Sales Baseline Performance Scores

NA: Not Applicable DK: Don't Know 1: Strongly Disagree 2: Disagree 3: Somewhat Disagree 4: Somewhat Agree 5: Agree 6: Strongly Agree

|  |                  | FREQUENCY OF RESPONSE |    |     |     |      |     |      |      |     |             | Post. Score | Mean Score | Std. Dev.       |           |    |
|--|------------------|-----------------------|----|-----|-----|------|-----|------|------|-----|-------------|-------------|------------|-----------------|-----------|----|
| Planning   |                  | No.                   | NA | DK  | 1   | 2    | 3   | 4    | 5    | 6   | Post. Score | Mean Score  | Std. Dev.  | Mean Score      | Std. Dev. |    |
| <b>1</b> Our marketing staff understands the business drivers in our markets.  | All              | 12                    | 0% | 0%  | 8%  | 25%  | 25% | 33%  | 0%   | 8%  | 8%          | 53%         | 22         | All             | 51%       | 20 |
|  | Sales Staff      | 7                     | 0% | 0%  | 14% | 0%   | 43% | 29%  | 0%   | 14% | 14%         | 57%         | 25         | Sales Staff     | 55%       | 20 |
|  | CEO              | 1                     | 0% | 0%  | 0%  | 100% | 0%  | 0%   | 0%   | 0%  | 0%          | 33%         | 0          | CEO             | 55%       | 22 |
|  | Management Staff | 4                     | 0% | 0%  | 0%  | 50%  | 0%  | 50%  | 0%   | 0%  | 0%          | 50%         | 19         | Management S... | 45%       | 18 |
| <b>2</b> We have thoroughly defined our various target markets.  | All              | 12                    | 0% | 0%  | 0%  | 42%  | 33% | 0%   | 25%  | 0%  | 25%         | 51%         | 20         |                 |           |    |
|  | Sales Staff      | 7                     | 0% | 0%  | 0%  | 29%  | 43% | 0%   | 29%  | 0%  | 29%         | 55%         | 20         |                 |           |    |
|  | CEO              | 1                     | 0% | 0%  | 0%  | 0%   | 0%  | 0%   | 100% | 0%  | 100%        | 83%         | 0          |                 |           |    |
|  | Management Staff | 4                     | 0% | 0%  | 0%  | 75%  | 25% | 0%   | 0%   | 0%  | 0%          | 38%         | 8          |                 |           |    |
| <b>3</b> We have an "Ideal Client Profile" written to assist the sales team in identifying prospects in each market. | All              | 12                    | 0% | 0%  | 8%  | 50%  | 25% | 8%   | 8%   | 0%  | 8%          | 43%         | 18         |                 |           |    |
|  | Sales Staff      | 7                     | 0% | 0%  | 0%  | 43%  | 29% | 14%  | 14%  | 0%  | 14%         | 50%         | 19         |                 |           |    |
|  | CEO              | 1                     | 0% | 0%  | 0%  | 100% | 0%  | 0%   | 0%   | 0%  | 0%          | 33%         | 0          |                 |           |    |
|  | Management Staff | 4                     | 0% | 0%  | 25% | 50%  | 25% | 0%   | 0%   | 0%  | 0%          | 33%         | 13         |                 |           |    |
| <b>4</b> We prepare an annual marketing plan.  | All              | 12                    | 0% | 8%  | 8%  | 0%   | 0%  | 67%  | 17%  | 0%  | 17%         | 65%         | 17         |                 |           |    |
|  | Sales Staff      | 7                     | 0% | 14% | 0%  | 0%   | 0%  | 71%  | 14%  | 0%  | 14%         | 69%         | 6          |                 |           |    |
|  | CEO              | 1                     | 0% | 0%  | 0%  | 0%   | 0%  | 0%   | 100% | 0%  | 100%        | 83%         | 0          |                 |           |    |
|  | Management Staff | 4                     | 0% | 0%  | 25% | 0%   | 0%  | 75%  | 0%   | 0%  | 0%          | 54%         | 25         |                 |           |    |
| <b>5</b> We revise our marketing plan as needed during the year.   | All              | 12                    | 0% | 0%  | 8%  | 8%   | 17% | 50%  | 8%   | 8%  | 17%         | 61%         | 21         |                 |           |    |
|  | Sales Staff      | 7                     | 0% | 0%  | 0%  | 0%   | 14% | 57%  | 14%  | 14% | 29%         | 71%         | 15         |                 |           |    |
|  | CEO              | 1                     | 0% | 0%  | 0%  | 0%   | 0%  | 100% | 0%   | 0%  | 0%          | 67%         | 0          |                 |           |    |
|  | Management Staff | 4                     | 0% | 0%  | 25% | 25%  | 25% | 25%  | 0%   | 0%  | 0%          | 42%         | 21         |                 |           |    |
| <b>6</b> We have a current social media strategy.  | All              | 12                    | 0% | 8%  | 8%  | 17%  | 8%  | 42%  | 8%   | 8%  | 17%         | 59%         | 23         |                 |           |    |
|  | Sales Staff      | 7                     | 0% | 14% | 0%  | 29%  | 14% | 29%  | 0%   | 14% | 14%         | 58%         | 25         |                 |           |    |
|  | CEO              | 1                     | 0% | 0%  | 0%  | 0%   | 0%  | 100% | 0%   | 0%  | 0%          | 67%         | 0          |                 |           |    |
|  | Management Staff | 4                     | 0% | 0%  | 25% | 0%   | 0%  | 50%  | 25%  | 0%  | 25%         | 58%         | 28         |                 |           |    |
| <b>7</b> We report Key Marketing Indicators to the staff.  | All              | 12                    | 0% | 0%  | 0%  | 83%  | 8%  | 8%   | 0%   | 0%  | 0%          | 38%         | 10         |                 |           |    |
|  | Sales Staff      | 7                     | 0% | 0%  | 0%  | 71%  | 14% | 14%  | 0%   | 0%  | 0%          | 40%         | 13         |                 |           |    |
|  | CEO              | 1                     | 0% | 0%  | 0%  | 100% | 0%  | 0%   | 0%   | 0%  | 0%          | 33%         | 0          |                 |           |    |
|  | Management Staff | 4                     | 0% | 0%  | 0%  | 100% | 0%  | 0%   | 0%   | 0%  | 0%          | 33%         | 0          |                 |           |    |



## Sales Baseline Performance Scores

**NA:** Not Applicable **DK:** Don't Know **1:** Strongly Disagree **2:** Disagree **3:** Somewhat Disagree **4:** Somewhat Agree **5:** Agree **6:** Strongly Agree

|   |                  |    |    |    |     |      |     |      |     |    |     |     |    |
|---|------------------|----|----|----|-----|------|-----|------|-----|----|-----|-----|----|
| <b>8</b> Our marketing generates a satisfactory number of qualified leads.  | All              | 12 | 0% | 0% | 8%  | 50%  | 17% | 25%  | 0%  | 0% | 0%  | 43% | 16 |
|   | Sales Staff      | 7  | 0% | 0% | 14% | 43%  | 29% | 14%  | 0%  | 0% | 0%  | 40% | 16 |
|   | CEO              | 1  | 0% | 0% | 0%  | 100% | 0%  | 0%   | 0%  | 0% | 0%  | 33% | 0  |
|   | Management Staff | 4  | 0% | 0% | 0%  | 50%  | 0%  | 50%  | 0%  | 0% | 0%  | 50% | 19 |
| <b>9</b> Our marketing team is a frequent contributor to new idea's and out-of-the-box thinking (New marketing; New Revenue streams; New methods of increasing Revenue/ Gross Profit per sale). | All              | 12 | 0% | 0% | 0%  | 33%  | 8%  | 50%  | 8%  | 0% | 8%  | 56% | 17 |
|   | Sales Staff      | 7  | 0% | 0% | 0%  | 29%  | 14% | 43%  | 14% | 0% | 14% | 57% | 18 |
|   | CEO              | 1  | 0% | 0% | 0%  | 0%   | 0%  | 100% | 0%  | 0% | 0%  | 67% | 0  |
|   | Management Staff | 4  | 0% | 0% | 0%  | 50%  | 0%  | 50%  | 0%  | 0% | 0%  | 50% | 19 |



## Sales Baseline Performance Scores

NA: Not Applicable DK: Don't Know 1: Strongly Disagree 2: Disagree 3: Somewhat Disagree 4: Somewhat Agree 5: Agree 6: Strongly Agree



| Initiatives   |                  | No. | FREQUENCY OF RESPONSE |     |     |      |     |      |      |      | Post. Score | Mean Score | Std. Dev. |                 | Mean Score | Std. Dev. |
|---|------------------|-----|-----------------------|-----|-----|------|-----|------|------|------|-------------|------------|-----------|-----------------|------------|-----------|
|   |                  |     | NA                    | DK  | 1   | 2    | 3   | 4    | 5    | 6    |             |            |           |                 |            |           |
| <b>10</b> Marketing is responsible for generating a majority of our new business inquiries. | All              | 12  | 0%                    | 8%  | 8%  | 58%  | 0%  | 17%  | 8%   | 0%   | 8%          | 42%        | 20        | All             | 61%        | 19        |
|   | Sales Staff      | 7   | 0%                    | 14% | 14% | 43%  | 0%  | 29%  | 0%   | 0%   | 0%          | 42%        | 20        | Sales Staff     | 57%        | 20        |
|   | CEO              | 1   | 0%                    | 0%  | 0%  | 100% | 0%  | 0%   | 0%   | 0%   | 0%          | 33%        | 0         | CEO             | 71%        | 17        |
|   | Management Staff | 4   | 0%                    | 0%  | 0%  | 75%  | 0%  | 0%   | 25%  | 0%   | 25%         | 46%        | 25        | Management S... | 65%        | 16        |
| <b>11</b> Branding is important to us.  | All              | 12  | 0%                    | 0%  | 0%  | 17%  | 0%  | 17%  | 58%  | 8%   | 67%         | 74%        | 20        |                 |            |           |
|   | Sales Staff      | 7   | 0%                    | 0%  | 0%  | 29%  | 0%  | 29%  | 43%  | 0%   | 43%         | 64%        | 22        |                 |            |           |
|   | CEO              | 1   | 0%                    | 0%  | 0%  | 0%   | 0%  | 0%   | 0%   | 100% | 100%        | 100%       | 0         |                 |            |           |
|   | Management Staff | 4   | 0%                    | 0%  | 0%  | 0%   | 0%  | 0%   | 100% | 0%   | 100%        | 83%        | 0         |                 |            |           |
| <b>12</b> Our branding is effective.  | All              | 12  | 0%                    | 8%  | 0%  | 8%   | 8%  | 42%  | 33%  | 0%   | 33%         | 68%        | 15        |                 |            |           |
|   | Sales Staff      | 7   | 0%                    | 14% | 0%  | 14%  | 0%  | 43%  | 29%  | 0%   | 29%         | 67%        | 18        |                 |            |           |
|   | CEO              | 1   | 0%                    | 0%  | 0%  | 0%   | 0%  | 0%   | 100% | 0%   | 100%        | 83%        | 0         |                 |            |           |
|   | Management Staff | 4   | 0%                    | 0%  | 0%  | 0%   | 25% | 50%  | 25%  | 0%   | 25%         | 67%        | 13        |                 |            |           |
| <b>13</b> Public Relations activities are important to our success.                         | All              | 12  | 0%                    | 0%  | 0%  | 17%  | 25% | 58%  | 0%   | 0%   | 0%          | 57%        | 13        |                 |            |           |
|   | Sales Staff      | 7   | 0%                    | 0%  | 0%  | 14%  | 43% | 43%  | 0%   | 0%   | 0%          | 55%        | 12        |                 |            |           |
|   | CEO              | 1   | 0%                    | 0%  | 0%  | 0%   | 0%  | 100% | 0%   | 0%   | 0%          | 67%        | 0         |                 |            |           |
|   | Management Staff | 4   | 0%                    | 0%  | 0%  | 25%  | 0%  | 75%  | 0%   | 0%   | 0%          | 58%        | 16        |                 |            |           |
| <b>14</b> We excel at leveraging Vendor Programs.   | All              | 12  | 8%                    | 0%  | 0%  | 17%  | 17% | 42%  | 0%   | 17%  | 17%         | 64%        | 22        |                 |            |           |
|   | Sales Staff      | 7   | 0%                    | 0%  | 0%  | 29%  | 14% | 29%  | 0%   | 29%  | 29%         | 64%        | 27        |                 |            |           |
|   | CEO              | 1   | 100%                  | 0%  | 0%  | 0%   | 0%  | 0%   | 0%   | 0%   | 0%          | 0%         | 0         |                 |            |           |
|   | Management Staff | 4   | 0%                    | 0%  | 0%  | 0%   | 25% | 75%  | 0%   | 0%   | 0%          | 63%        | 8         |                 |            |           |
| <b>15</b> We have effective strategic partnerships.   | All              | 12  | 0%                    | 0%  | 0%  | 17%  | 17% | 42%  | 8%   | 17%  | 25%         | 65%        | 21        |                 |            |           |
|   | Sales Staff      | 7   | 0%                    | 0%  | 0%  | 14%  | 29% | 14%  | 14%  | 29%  | 43%         | 69%        | 26        |                 |            |           |
|   | CEO              | 1   | 0%                    | 0%  | 0%  | 0%   | 0%  | 100% | 0%   | 0%   | 0%          | 67%        | 0         |                 |            |           |
|   | Management Staff | 4   | 0%                    | 0%  | 0%  | 25%  | 0%  | 75%  | 0%   | 0%   | 0%          | 58%        | 16        |                 |            |           |
| <b>16</b> We have strong multi-level relationships with our vendors.                        | All              | 12  | 0%                    | 17% | 0%  | 0%   | 8%  | 58%  | 17%  | 0%   | 17%         | 68%        | 9         |                 |            |           |
|   | Sales Staff      | 7   | 0%                    | 29% | 0%  | 0%   | 14% | 43%  | 14%  | 0%   | 14%         | 67%        | 11        |                 |            |           |
|   | CEO              | 1   | 0%                    | 0%  | 0%  | 0%   | 0%  | 100% | 0%   | 0%   | 0%          | 67%        | 0         |                 |            |           |
|   | Management Staff | 4   | 0%                    | 0%  | 0%  | 0%   | 0%  | 75%  | 25%  | 0%   | 25%         | 71%        | 8         |                 |            |           |





## Sales Baseline Performance Scores

**NA:** Not Applicable **DK:** Don't Know **1:** Strongly Disagree **2:** Disagree **3:** Somewhat Disagree **4:** Somewhat Agree **5:** Agree **6:** Strongly Agree

|   |                  |    |    |    |     |     |     |      |      |     |      |     |    |
|---|------------------|----|----|----|-----|-----|-----|------|------|-----|------|-----|----|
| <b>17</b> We invest the right amount of money and time on our internet marketing (Website, Landing Page, Adwords, SEO strategy, and email marketing). | All              | 12 | 0% | 0% | 8%  | 17% | 25% | 25%  | 17%  | 8%  | 25%  | 58% | 24 |
|   | Sales Staff      | 7  | 0% | 0% | 14% | 29% | 14% | 29%  | 14%  | 0%  | 14%  | 50% | 23 |
|   | CEO              | 1  | 0% | 0% | 0%  | 0%  | 0%  | 100% | 0%   | 0%  | 0%   | 67% | 0  |
|   | Management Staff | 4  | 0% | 0% | 0%  | 0%  | 50% | 0%   | 25%  | 25% | 50%  | 71% | 25 |
|   |                  |    |    |    |     |     |     |      |      |     |      |     |    |
| <b>18</b> We invest the right amount of time and money on Traditional Marketing (Trade Shows, Print ads, Direct Mail, Radio/TV, Telemarketing).       | All              | 12 | 0% | 0% | 0%  | 25% | 8%  | 25%  | 42%  | 0%  | 42%  | 64% | 21 |
|   | Sales Staff      | 7  | 0% | 0% | 0%  | 43% | 14% | 29%  | 14%  | 0%  | 14%  | 52% | 20 |
|   | CEO              | 1  | 0% | 0% | 0%  | 0%  | 0%  | 0%   | 100% | 0%  | 100% | 83% | 0  |
|   | Management Staff | 4  | 0% | 0% | 0%  | 0%  | 0%  | 25%  | 75%  | 0%  | 75%  | 79% | 8  |
|   |                  |    |    |    |     |     |     |      |      |     |      |     |    |
| <b>19</b> We have the resources to timely achieve our marketing plans.  | All              | 12 | 0% | 0% | 0%  | 25% | 17% | 33%  | 25%  | 0%  | 25%  | 60% | 19 |
|   | Sales Staff      | 7  | 0% | 0% | 0%  | 43% | 14% | 29%  | 14%  | 0%  | 14%  | 52% | 20 |
|   | CEO              | 1  | 0% | 0% | 0%  | 0%  | 0%  | 0%   | 100% | 0%  | 100% | 83% | 0  |
|   | Management Staff | 4  | 0% | 0% | 0%  | 0%  | 25% | 50%  | 25%  | 0%  | 25%  | 67% | 13 |
|   |                  |    |    |    |     |     |     |      |      |     |      |     |    |
| <b>20</b> We are satisfied with the results of our marketing efforts.   | All              | 12 | 0% | 0% | 0%  | 17% | 33% | 42%  | 8%   | 0%  | 8%   | 57% | 15 |
|   | Sales Staff      | 7  | 0% | 0% | 0%  | 29% | 29% | 43%  | 0%   | 0%  | 0%   | 52% | 14 |
|   | CEO              | 1  | 0% | 0% | 0%  | 0%  | 0%  | 100% | 0%   | 0%  | 0%   | 67% | 0  |
|   | Management Staff | 4  | 0% | 0% | 0%  | 0%  | 50% | 25%  | 25%  | 0%  | 25%  | 63% | 15 |
|   |                  |    |    |    |     |     |     |      |      |     |      |     |    |



## Sales Baseline Performance Scores

NA: Not Applicable DK: Don't Know 1: Strongly Disagree 2: Disagree 3: Somewhat Disagree 4: Somewhat Agree 5: Agree 6: Strongly Agree

|   |                  | 46% |    | 50%                   |    | Not Applicable |      | Don't Know |     | Disagree |             | Agree      |           |                 |            |           |
|---|------------------|-----|----|-----------------------|----|----------------|------|------------|-----|----------|-------------|------------|-----------|-----------------|------------|-----------|
| Qualifying  |                  | No. | NA | FREQUENCY OF RESPONSE |    |                |      |            |     |          | Post. Score | Mean Score | Std. Dev. |                 | Mean Score | Std. Dev. |
|   |                  |     |    | 1                     | 2  | 3              | 4    | 5          | 6   |          |             |            |           |                 |            |           |
| <b>21</b> All sales and marketing team members can effectively give our company's "elevator pitch".   | All              | 12  | 0% | 0%                    | 0% | 33%            | 17%  | 33%        | 17% | 0%       | 17%         | 56%        | 19        | All             | 61%        | 18        |
|   | Sales Staff      | 7   | 0% | 0%                    | 0% | 29%            | 14%  | 43%        | 14% | 0%       | 14%         | 57%        | 18        | Sales Staff     | 66%        | 16        |
|   | CEO              | 1   | 0% | 0%                    | 0% | 0%             | 0%   | 100%       | 0%  | 0%       | 0%          | 67%        | 0         | CEO             | 58%        | 15        |
|   | Management Staff | 4   | 0% | 0%                    | 0% | 50%            | 25%  | 0%         | 25% | 0%       | 25%         | 50%        | 23        | Management S... | 52%        | 19        |
| <b>22</b> We have a consistent script for use in prospecting.   | All              | 12  | 0% | 0%                    | 0% | 42%            | 25%  | 33%        | 0%  | 0%       | 0%          | 49%        | 15        |                 |            |           |
|   | Sales Staff      | 7   | 0% | 0%                    | 0% | 43%            | 14%  | 43%        | 0%  | 0%       | 0%          | 50%        | 16        |                 |            |           |
|   | CEO              | 1   | 0% | 0%                    | 0% | 0%             | 100% | 0%         | 0%  | 0%       | 0%          | 50%        | 0         |                 |            |           |
|   | Management Staff | 4   | 0% | 0%                    | 0% | 50%            | 25%  | 25%        | 0%  | 0%       | 0%          | 46%        | 15        |                 |            |           |
| <b>23</b> Our sales team can speak effectively with a prospect regarding their competitive landscape, trends, and challenges.                       | All              | 12  | 0% | 0%                    | 0% | 17%            | 8%   | 33%        | 42% | 0%       | 42%         | 67%        | 18        |                 |            |           |
|   | Sales Staff      | 7   | 0% | 0%                    | 0% | 0%             | 14%  | 29%        | 57% | 0%       | 57%         | 74%        | 13        |                 |            |           |
|   | CEO              | 1   | 0% | 0%                    | 0% | 0%             | 0%   | 100%       | 0%  | 0%       | 0%          | 67%        | 0         |                 |            |           |
|   | Management Staff | 4   | 0% | 0%                    | 0% | 50%            | 0%   | 25%        | 25% | 0%       | 25%         | 54%        | 25        |                 |            |           |
| <b>24</b> We have an internal assessment process for qualifying sales opportunities.  | All              | 12  | 0% | 0%                    | 0% | 0%             | 33%  | 50%        | 17% | 0%       | 17%         | 64%        | 11        |                 |            |           |
|   | Sales Staff      | 7   | 0% | 0%                    | 0% | 0%             | 14%  | 57%        | 29% | 0%       | 29%         | 69%        | 11        |                 |            |           |
|   | CEO              | 1   | 0% | 0%                    | 0% | 0%             | 100% | 0%         | 0%  | 0%       | 0%          | 50%        | 0         |                 |            |           |
|   | Management Staff | 4   | 0% | 0%                    | 0% | 0%             | 50%  | 50%        | 0%  | 0%       | 0%          | 58%        | 9         |                 |            |           |
| <b>25</b> Our sales team is effective in assessing the business development effort required against the revenue/profit estimate of the opportunity. | All              | 12  | 0% | 0%                    | 0% | 17%            | 8%   | 42%        | 33% | 0%       | 33%         | 65%        | 18        |                 |            |           |
|   | Sales Staff      | 7   | 0% | 0%                    | 0% | 0%             | 0%   | 43%        | 57% | 0%       | 57%         | 76%        | 8         |                 |            |           |
|   | CEO              | 1   | 0% | 0%                    | 0% | 0%             | 100% | 0%         | 0%  | 0%       | 0%          | 50%        | 0         |                 |            |           |
|   | Management Staff | 4   | 0% | 0%                    | 0% | 50%            | 0%   | 50%        | 0%  | 0%       | 0%          | 50%        | 19        |                 |            |           |
| <b>26</b> We supplement our marketing and prospecting with defined networking/business development activities.                                      | All              | 12  | 0% | 0%                    | 0% | 50%            | 17%  | 17%        | 17% | 0%       | 17%         | 50%        | 20        |                 |            |           |
|   | Sales Staff      | 7   | 0% | 0%                    | 0% | 29%            | 14%  | 29%        | 29% | 0%       | 29%         | 60%        | 21        |                 |            |           |
|   | CEO              | 1   | 0% | 0%                    | 0% | 100%           | 0%   | 0%         | 0%  | 0%       | 0%          | 33%        | 0         |                 |            |           |
|   | Management Staff | 4   | 0% | 0%                    | 0% | 75%            | 25%  | 0%         | 0%  | 0%       | 0%          | 38%        | 8         |                 |            |           |



## Sales Baseline Performance Scores

**NA:** Not Applicable **DK:** Don't Know **1:** Strongly Disagree **2:** Disagree **3:** Somewhat Disagree **4:** Somewhat Agree **5:** Agree **6:** Strongly Agree

|   |                  |    |    |     |    |     |     |      |      |    |      |     |    |
|---|------------------|----|----|-----|----|-----|-----|------|------|----|------|-----|----|
| <b>27</b> We have specifically designed questions to ask during the qualification process that indicates the fit of each prospect against our ideal prospect profile. | All              | 12 | 0% | 8%  | 0% | 17% | 17% | 58%  | 0%   | 0% | 0%   | 58% | 13 |
|   | Sales Staff      | 7  | 0% | 14% | 0% | 0%  | 0%  | 86%  | 0%   | 0% | 0%   | 67% | 0  |
|   | CEO              | 1  | 0% | 0%  | 0% | 0%  | 0%  | 100% | 0%   | 0% | 0%   | 67% | 0  |
|   | Management Staff | 4  | 0% | 0%  | 0% | 50% | 50% | 0%   | 0%   | 0% | 0%   | 42% | 9  |
| <b>28</b> Sales staff are responsible for generating a majority of our new business inquiries.  | All              | 12 | 0% | 0%  | 0% | 0%  | 0%  | 8%   | 92%  | 0% | 92%  | 82% | 4  |
|   | Sales Staff      | 7  | 0% | 0%  | 0% | 0%  | 0%  | 14%  | 86%  | 0% | 86%  | 81% | 6  |
|   | CEO              | 1  | 0% | 0%  | 0% | 0%  | 0%  | 0%   | 100% | 0% | 100% | 83% | 0  |
|   | Management Staff | 4  | 0% | 0%  | 0% | 0%  | 0%  | 0%   | 100% | 0% | 100% | 83% | 0  |

# Sales Baseline

## Performance Scores

NA: Not Applicable DK: Don't Know 1: Strongly Disagree 2: Disagree 3: Somewhat Disagree 4: Somewhat Agree 5: Agree 6: Strongly Agree

|   |                  | FREQUENCY OF RESPONSE |     |     |    |     |      |      |      |      |      | Post. Score | Mean Score | Std. Dev.       |     |    |
|---|------------------|-----------------------|-----|-----|----|-----|------|------|------|------|------|-------------|------------|-----------------|-----|----|
| Processes   | No.              | NA                    | DK  | 1   | 2  | 3   | 4    | 5    | 6    |      |      |             | Mean Score | Std. Dev.       |     |    |
| <b>29</b> We follow a well defined Sales Process.   | All              | 12                    | 0%  | 0%  | 0% | 25% | 17%  | 58%  | 0%   | 0%   | 0%   | 56%         | 14         | All             | 61% | 18 |
|   | Sales Staff      | 7                     | 0%  | 0%  | 0% | 0%  | 14%  | 86%  | 0%   | 0%   | 0%   | 64%         | 6          | Sales Staff     | 66% | 17 |
|   | CEO              | 1                     | 0%  | 0%  | 0% | 0%  | 0%   | 100% | 0%   | 0%   | 0%   | 67%         | 0          | CEO             | 70% | 16 |
|   | Management Staff | 4                     | 0%  | 0%  | 0% | 75% | 25%  | 0%   | 0%   | 0%   | 0%   | 38%         | 8          | Management S... | 52% | 17 |
| <b>30</b> We utilize an initial presentation which is focused on our prospects' market and business challenges (not on us). | All              | 12                    | 8%  | 0%  | 0% | 17% | 50%  | 17%  | 8%   | 0%   | 8%   | 53%         | 14         |                 |     |    |
|   | Sales Staff      | 7                     | 14% | 0%  | 0% | 0%  | 43%  | 29%  | 14%  | 0%   | 14%  | 61%         | 13         |                 |     |    |
|   | CEO              | 1                     | 0%  | 0%  | 0% | 0%  | 100% | 0%   | 0%   | 0%   | 0%   | 50%         | 0          |                 |     |    |
|   | Management Staff | 4                     | 0%  | 0%  | 0% | 50% | 50%  | 0%   | 0%   | 0%   | 0%   | 42%         | 9          |                 |     |    |
| <b>31</b> When it is time to discuss our company story, we are able to tell it effectively.                                 | All              | 12                    | 0%  | 0%  | 0% | 8%  | 8%   | 25%  | 33%  | 25%  | 58%  | 76%         | 20         |                 |     |    |
|   | Sales Staff      | 7                     | 0%  | 0%  | 0% | 14% | 14%  | 0%   | 43%  | 29%  | 71%  | 76%         | 25         |                 |     |    |
|   | CEO              | 1                     | 0%  | 0%  | 0% | 0%  | 0%   | 0%   | 0%   | 100% | 100% | 100%        | 0          |                 |     |    |
|   | Management Staff | 4                     | 0%  | 0%  | 0% | 0%  | 0%   | 75%  | 25%  | 0%   | 25%  | 71%         | 8          |                 |     |    |
| <b>32</b> We incorporate the specific advantages of our solutions for each prospect presentation.                           | All              | 12                    | 0%  | 8%  | 0% | 0%  | 17%  | 25%  | 50%  | 0%   | 50%  | 73%         | 13         |                 |     |    |
|   | Sales Staff      | 7                     | 0%  | 14% | 0% | 0%  | 0%   | 29%  | 57%  | 0%   | 57%  | 78%         | 8          |                 |     |    |
|   | CEO              | 1                     | 0%  | 0%  | 0% | 0%  | 0%   | 0%   | 100% | 0%   | 100% | 83%         | 0          |                 |     |    |
|   | Management Staff | 4                     | 0%  | 0%  | 0% | 0%  | 50%  | 25%  | 25%  | 0%   | 25%  | 63%         | 15         |                 |     |    |
| <b>33</b> We have standard templates for common communication events proposals, product responses, and RFP responses.       | All              | 12                    | 0%  | 0%  | 0% | 0%  | 17%  | 67%  | 17%  | 0%   | 17%  | 67%         | 10         |                 |     |    |
|   | Sales Staff      | 7                     | 0%  | 0%  | 0% | 0%  | 14%  | 71%  | 14%  | 0%   | 14%  | 67%         | 9          |                 |     |    |
|   | CEO              | 1                     | 0%  | 0%  | 0% | 0%  | 0%   | 100% | 0%   | 0%   | 0%   | 67%         | 0          |                 |     |    |
|   | Management Staff | 4                     | 0%  | 0%  | 0% | 0%  | 25%  | 50%  | 25%  | 0%   | 25%  | 67%         | 13         |                 |     |    |
| <b>34</b> We deliver compelling proposals and value propositions for our solutions.   | All              | 12                    | 0%  | 0%  | 0% | 0%  | 25%  | 33%  | 33%  | 8%   | 42%  | 71%         | 16         |                 |     |    |
|   | Sales Staff      | 7                     | 0%  | 0%  | 0% | 0%  | 14%  | 29%  | 43%  | 14%  | 57%  | 76%         | 16         |                 |     |    |
|   | CEO              | 1                     | 0%  | 0%  | 0% | 0%  | 0%   | 100% | 0%   | 0%   | 0%   | 67%         | 0          |                 |     |    |
|   | Management Staff | 4                     | 0%  | 0%  | 0% | 0%  | 50%  | 25%  | 25%  | 0%   | 25%  | 63%         | 15         |                 |     |    |
| <b>35</b> We use a defined method to handling common objections.  | All              | 12                    | 0%  | 0%  | 0% | 17% | 8%   | 67%  | 8%   | 0%   | 8%   | 61%         | 14         |                 |     |    |
|   | Sales Staff      | 7                     | 0%  | 0%  | 0% | 14% | 0%   | 71%  | 14%  | 0%   | 14%  | 64%         | 14         |                 |     |    |
|   | CEO              | 1                     | 0%  | 0%  | 0% | 0%  | 0%   | 100% | 0%   | 0%   | 0%   | 67%         | 0          |                 |     |    |
|   | Management Staff | 4                     | 0%  | 0%  | 0% | 25% | 25%  | 50%  | 0%   | 0%   | 0%   | 54%         | 15         |                 |     |    |



## Sales Baseline Performance Scores

**NA:** Not Applicable **DK:** Don't Know **1:** Strongly Disagree **2:** Disagree **3:** Somewhat Disagree **4:** Somewhat Agree **5:** Agree **6:** Strongly Agree

|  |                  |    |    |    |     |     |      |     |      |    |      |     |    |
|--|------------------|----|----|----|-----|-----|------|-----|------|----|------|-----|----|
| <b>36</b> We have access to the right amount of pre-sales support to win business.                           | All              | 12 | 0% | 0% | 0%  | 42% | 33%  | 8%  | 17%  | 0% | 17%  | 50% | 18 |
|  | Sales Staff      | 7  | 0% | 0% | 0%  | 57% | 14%  | 14% | 14%  | 0% | 14%  | 48% | 20 |
|  | CEO              | 1  | 0% | 0% | 0%  | 0%  | 0%   | 0%  | 100% | 0% | 100% | 83% | 0  |
|  | Management Staff | 4  | 0% | 0% | 0%  | 25% | 75%  | 0%  | 0%   | 0% | 0%   | 46% | 8  |
| <b>37</b> We have a formal Account Management Strategy for large opportunities that guides our sales effort. | All              | 12 | 0% | 0% | 8%  | 33% | 17%  | 33% | 8%   | 0% | 8%   | 50% | 20 |
|  | Sales Staff      | 7  | 0% | 0% | 0%  | 14% | 14%  | 57% | 14%  | 0% | 14%  | 62% | 15 |
|  | CEO              | 1  | 0% | 0% | 0%  | 0%  | 100% | 0%  | 0%   | 0% | 0%   | 50% | 0  |
|  | Management Staff | 4  | 0% | 0% | 25% | 75% | 0%   | 0%  | 0%   | 0% | 0%   | 29% | 8  |



## Sales Baseline Performance Scores

NA: Not Applicable DK: Don't Know 1: Strongly Disagree 2: Disagree 3: Somewhat Disagree 4: Somewhat Agree 5: Agree 6: Strongly Agree



| Perfmnce   |                  | No. | FREQUENCY OF RESPONSE |     |     |      |      |      |     |     | Post. Score | Mean Score | Std. Dev. |                 | Mean Score | Std. Dev. |
|--|------------------|-----|-----------------------|-----|-----|------|------|------|-----|-----|-------------|------------|-----------|-----------------|------------|-----------|
|  |                  |     | NA                    | DK  | 1   | 2    | 3    | 4    | 5   | 6   |             |            |           |                 |            |           |
| <b>38</b> Our sales staff consistently achieves their individual sales quota's.  | All              | 12  | 0%                    | 0%  | 0%  | 17%  | 17%  | 17%  | 50% | 0%  | 50%         | 67%        | 20        | All             | 62%        | 20        |
|  | Sales Staff      | 7   | 0%                    | 0%  | 0%  | 0%   | 14%  | 14%  | 71% | 0%  | 71%         | 76%        | 13        | Sales Staff     | 72%        | 16        |
|  | CEO              | 1   | 0%                    | 0%  | 0%  | 0%   | 0%   | 100% | 0%  | 0%  | 0%          | 67%        | 0         | CEO             | 57%        | 18        |
|  | Management Staff | 4   | 0%                    | 0%  | 0%  | 50%  | 25%  | 0%   | 25% | 0%  | 25%         | 50%        | 23        | Management S... | 47%        | 17        |
| <b>39</b> We consistently follow a defined process for managing underperforming sales staff.                                 | All              | 12  | 8%                    | 0%  | 0%  | 33%  | 17%  | 42%  | 0%  | 0%  | 0%          | 52%        | 15        |                 |            |           |
|  | Sales Staff      | 7   | 14%                   | 0%  | 0%  | 0%   | 29%  | 57%  | 0%  | 0%  | 0%          | 61%        | 8         |                 |            |           |
|  | CEO              | 1   | 0%                    | 0%  | 0%  | 100% | 0%   | 0%   | 0%  | 0%  | 0%          | 33%        | 0         |                 |            |           |
|  | Management Staff | 4   | 0%                    | 0%  | 0%  | 75%  | 0%   | 25%  | 0%  | 0%  | 0%          | 42%        | 16        |                 |            |           |
| <b>40</b> Our sales staff pipeline has the right amount of qualified prospects to achieve our sales goals.                   | All              | 12  | 0%                    | 0%  | 0%  | 17%  | 33%  | 42%  | 0%  | 8%  | 8%          | 58%        | 18        |                 |            |           |
|  | Sales Staff      | 7   | 0%                    | 0%  | 0%  | 14%  | 14%  | 71%  | 0%  | 0%  | 0%          | 60%        | 13        |                 |            |           |
|  | CEO              | 1   | 0%                    | 0%  | 0%  | 100% | 0%   | 0%   | 0%  | 0%  | 0%          | 33%        | 0         |                 |            |           |
|  | Management Staff | 4   | 0%                    | 0%  | 0%  | 0%   | 75%  | 0%   | 0%  | 25% | 25%         | 63%        | 25        |                 |            |           |
| <b>41</b> Our sales staff enters data into our Sales and Marketing systems (SFA, CRM, etc.) in a timely and accurate manner. | All              | 12  | 0%                    | 0%  | 0%  | 33%  | 42%  | 17%  | 8%  | 0%  | 8%          | 50%        | 15        |                 |            |           |
|  | Sales Staff      | 7   | 0%                    | 0%  | 0%  | 14%  | 57%  | 29%  | 0%  | 0%  | 0%          | 52%        | 11        |                 |            |           |
|  | CEO              | 1   | 0%                    | 0%  | 0%  | 100% | 0%   | 0%   | 0%  | 0%  | 0%          | 33%        | 0         |                 |            |           |
|  | Management Staff | 4   | 0%                    | 0%  | 0%  | 50%  | 25%  | 0%   | 25% | 0%  | 25%         | 50%        | 23        |                 |            |           |
| <b>42</b> Our sales staff effectively ties business issues (client pain/opportunity) to our business solutions.              | All              | 12  | 0%                    | 0%  | 8%  | 8%   | 17%  | 33%  | 33% | 0%  | 33%         | 63%        | 21        |                 |            |           |
|  | Sales Staff      | 7   | 0%                    | 0%  | 14% | 0%   | 0%   | 29%  | 57% | 0%  | 57%         | 69%        | 24        |                 |            |           |
|  | CEO              | 1   | 0%                    | 0%  | 0%  | 0%   | 0%   | 100% | 0%  | 0%  | 0%          | 67%        | 0         |                 |            |           |
|  | Management Staff | 4   | 0%                    | 0%  | 0%  | 25%  | 50%  | 25%  | 0%  | 0%  | 0%          | 50%        | 13        |                 |            |           |
| <b>43</b> Our sales staff is adept at positioning our value and setting traps throughout the sales cycle.                    | All              | 12  | 0%                    | 8%  | 0%  | 17%  | 25%  | 17%  | 33% | 0%  | 33%         | 62%        | 19        |                 |            |           |
|  | Sales Staff      | 7   | 0%                    | 14% | 0%  | 0%   | 0%   | 29%  | 57% | 0%  | 57%         | 78%        | 8         |                 |            |           |
|  | CEO              | 1   | 0%                    | 0%  | 0%  | 0%   | 100% | 0%   | 0%  | 0%  | 0%          | 50%        | 0         |                 |            |           |
|  | Management Staff | 4   | 0%                    | 0%  | 0%  | 50%  | 50%  | 0%   | 0%  | 0%  | 0%          | 42%        | 9         |                 |            |           |
| <b>44</b> Our sales staff helps prospects identify and quantify the financial impact (risk or reward) of our solutions.      | All              | 12  | 0%                    | 0%  | 0%  | 25%  | 25%  | 8%   | 42% | 0%  | 42%         | 61%        | 21        |                 |            |           |
|  | Sales Staff      | 7   | 0%                    | 0%  | 0%  | 0%   | 14%  | 14%  | 71% | 0%  | 71%         | 76%        | 13        |                 |            |           |
|  | CEO              | 1   | 0%                    | 0%  | 0%  | 0%   | 100% | 0%   | 0%  | 0%  | 0%          | 50%        | 0         |                 |            |           |
|  | Management Staff | 4   | 0%                    | 0%  | 0%  | 75%  | 25%  | 0%   | 0%  | 0%  | 0%          | 38%        | 8         |                 |            |           |



## Sales Baseline Performance Scores

**NA:** Not Applicable **DK:** Don't Know **1:** Strongly Disagree **2:** Disagree **3:** Somewhat Disagree **4:** Somewhat Agree **5:** Agree **6:** Strongly Agree

|  |                  |    |    |     |    |      |      |      |      |     |      |     |    |
|--|------------------|----|----|-----|----|------|------|------|------|-----|------|-----|----|
| <b>45</b> We do not offer excessive discounting to win deals.                                    | All              | 12 | 0% | 0%  | 0% | 25%  | 0%   | 8%   | 58%  | 8%  | 67%  | 71% | 23 |
|  | Sales Staff      | 7  | 0% | 0%  | 0% | 0%   | 0%   | 0%   | 86%  | 14% | 100% | 86% | 6  |
|  | CEO              | 1  | 0% | 0%  | 0% | 0%   | 0%   | 0%   | 100% | 0%  | 100% | 83% | 0  |
|  | Management Staff | 4  | 0% | 0%  | 0% | 75%  | 0%   | 25%  | 0%   | 0%  | 0%   | 42% | 16 |
| <b>46</b> Our sales team knows when to "quit selling" and begin negotiating.                     | All              | 12 | 0% | 8%  | 0% | 25%  | 0%   | 17%  | 50%  | 0%  | 50%  | 67% | 22 |
|  | Sales Staff      | 7  | 0% | 14% | 0% | 0%   | 0%   | 0%   | 86%  | 0%  | 86%  | 83% | 0  |
|  | CEO              | 1  | 0% | 0%  | 0% | 0%   | 0%   | 100% | 0%   | 0%  | 0%   | 67% | 0  |
|  | Management Staff | 4  | 0% | 0%  | 0% | 75%  | 0%   | 25%  | 0%   | 0%  | 0%   | 42% | 16 |
| <b>47</b> Our sales team is effective at negotiating.  | All              | 12 | 0% | 8%  | 0% | 33%  | 8%   | 8%   | 42%  | 0%  | 42%  | 61% | 23 |
|  | Sales Staff      | 7  | 0% | 14% | 0% | 0%   | 0%   | 14%  | 71%  | 0%  | 71%  | 81% | 6  |
|  | CEO              | 1  | 0% | 0%  | 0% | 0%   | 100% | 0%   | 0%   | 0%  | 0%   | 50% | 0  |
|  | Management Staff | 4  | 0% | 0%  | 0% | 100% | 0%   | 0%   | 0%   | 0%  | 0%   | 33% | 0  |
| <b>48</b> We win more than we lose against our core competition.                                 | All              | 12 | 0% | 0%  | 0% | 0%   | 17%  | 25%  | 58%  | 0%  | 58%  | 74% | 13 |
|  | Sales Staff      | 7  | 0% | 0%  | 0% | 0%   | 14%  | 14%  | 71%  | 0%  | 71%  | 76% | 13 |
|  | CEO              | 1  | 0% | 0%  | 0% | 0%   | 0%   | 0%   | 100% | 0%  | 100% | 83% | 0  |
|  | Management Staff | 4  | 0% | 0%  | 0% | 0%   | 25%  | 50%  | 25%  | 0%  | 25%  | 67% | 13 |
| <b>49</b> We incorporate collaboration with our clients as part of our account planning process. | All              | 12 | 0% | 0%  | 0% | 25%  | 25%  | 8%   | 42%  | 0%  | 42%  | 61% | 21 |
|  | Sales Staff      | 7  | 0% | 0%  | 0% | 14%  | 0%   | 14%  | 71%  | 0%  | 71%  | 74% | 18 |
|  | CEO              | 1  | 0% | 0%  | 0% | 0%   | 100% | 0%   | 0%   | 0%  | 0%   | 50% | 0  |
|  | Management Staff | 4  | 0% | 0%  | 0% | 50%  | 50%  | 0%   | 0%   | 0%  | 0%   | 42% | 9  |
| <b>50</b> Leads are followed up in a timely, accurate, and effective manner.                     | All              | 12 | 0% | 0%  | 0% | 8%   | 17%  | 17%  | 50%  | 8%  | 58%  | 72% | 19 |
|  | Sales Staff      | 7  | 0% | 0%  | 0% | 14%  | 0%   | 14%  | 57%  | 14% | 71%  | 76% | 21 |
|  | CEO              | 1  | 0% | 0%  | 0% | 0%   | 0%   | 0%   | 100% | 0%  | 100% | 83% | 0  |
|  | Management Staff | 4  | 0% | 0%  | 0% | 0%   | 50%  | 25%  | 25%  | 0%  | 25%  | 63% | 15 |

# Sales Baseline

## Performance Scores

NA: Not Applicable DK: Don't Know 1: Strongly Disagree 2: Disagree 3: Somewhat Disagree 4: Somewhat Agree 5: Agree 6: Strongly Agree

|   |                  | 48% |    | 48%                   |     | Not Applicable |     |      |      |             | Don't Know |           | Disagree |                 | Agree     |    |
|---|------------------|-----|----|-----------------------|-----|----------------|-----|------|------|-------------|------------|-----------|----------|-----------------|-----------|----|
| Mgmt  |                  | No. | NA | FREQUENCY OF RESPONSE |     |                |     |      |      | Post. Score | Mean Score | Std. Dev. |          | Mean Score      | Std. Dev. |    |
|   |                  |     |    | DK                    | 1   | 2              | 3   | 4    | 5    |             |            |           |          |                 |           | 6  |
| <b>51</b> We prepare an annual sales plan.  | All              | 12  | 0% | 0%                    | 8%  | 0%             | 0%  | 50%  | 42%  | 0%          | 42%        | 69%       | 18       | All             | 49%       | 19 |
|   | Sales Staff      | 7   | 0% | 0%                    | 0%  | 0%             | 0%  | 43%  | 57%  | 0%          | 57%        | 76%       | 8        | Sales Staff     | 53%       | 18 |
|   | CEO              | 1   | 0% | 0%                    | 0%  | 0%             | 0%  | 0%   | 100% | 0%          | 100%       | 83%       | 0        | CEO             | 63%       | 18 |
|   | Management Staff | 4   | 0% | 0%                    | 25% | 0%             | 0%  | 75%  | 0%   | 0%          | 0%         | 54%       | 25       | Management S... | 39%       | 17 |
| <b>52</b> We formally review our company's actual sales performance versus plan quarterly.  | All              | 12  | 0% | 0%                    | 8%  | 8%             | 0%  | 75%  | 8%   | 0%          | 8%         | 61%       | 17       |                 |           |    |
|   | Sales Staff      | 7   | 0% | 0%                    | 0%  | 0%             | 0%  | 86%  | 14%  | 0%          | 14%        | 69%       | 6        |                 |           |    |
|   | CEO              | 1   | 0% | 0%                    | 0%  | 0%             | 0%  | 100% | 0%   | 0%          | 0%         | 67%       | 0        |                 |           |    |
|   | Management Staff | 4   | 0% | 0%                    | 25% | 25%            | 0%  | 50%  | 0%   | 0%          | 0%         | 46%       | 25       |                 |           |    |
| <b>53</b> When we are off plan, we prepare "Bridge Plans" to recover our performance goals.   | All              | 12  | 0% | 0%                    | 8%  | 50%            | 8%  | 17%  | 17%  | 0%          | 17%        | 47%       | 22       |                 |           |    |
|   | Sales Staff      | 7   | 0% | 0%                    | 0%  | 29%            | 14% | 29%  | 29%  | 0%          | 29%        | 60%       | 21       |                 |           |    |
|   | CEO              | 1   | 0% | 0%                    | 0%  | 100%           | 0%  | 0%   | 0%   | 0%          | 0%         | 33%       | 0        |                 |           |    |
|   | Management Staff | 4   | 0% | 0%                    | 25% | 75%            | 0%  | 0%   | 0%   | 0%          | 0%         | 29%       | 8        |                 |           |    |
| <b>54</b> Our Sales Managers excel at executing our company sales plan.   | All              | 12  | 0% | 0%                    | 8%  | 33%            | 8%  | 50%  | 0%   | 0%          | 0%         | 50%       | 18       |                 |           |    |
|   | Sales Staff      | 7   | 0% | 0%                    | 0%  | 14%            | 14% | 71%  | 0%   | 0%          | 0%         | 60%       | 13       |                 |           |    |
|   | CEO              | 1   | 0% | 0%                    | 0%  | 0%             | 0%  | 100% | 0%   | 0%          | 0%         | 67%       | 0        |                 |           |    |
|   | Management Staff | 4   | 0% | 0%                    | 25% | 75%            | 0%  | 0%   | 0%   | 0%          | 0%         | 29%       | 8        |                 |           |    |
| <b>55</b> Our sales managers consistently meet their assigned sales goals.  | All              | 12  | 0% | 0%                    | 8%  | 17%            | 33% | 33%  | 8%   | 0%          | 8%         | 53%       | 18       |                 |           |    |
|   | Sales Staff      | 7   | 0% | 0%                    | 0%  | 0%             | 43% | 43%  | 14%  | 0%          | 14%        | 62%       | 12       |                 |           |    |
|   | CEO              | 1   | 0% | 0%                    | 0%  | 0%             | 0%  | 100% | 0%   | 0%          | 0%         | 67%       | 0        |                 |           |    |
|   | Management Staff | 4   | 0% | 0%                    | 25% | 50%            | 25% | 0%   | 0%   | 0%          | 0%         | 33%       | 13       |                 |           |    |
| <b>56</b> Our sales managers are frequent contributors to new ideas and out-of-the-box thinking (New marketing; New Revenue streams; New methods of increasing Revenue/ Gross Profit per sale). | All              | 12  | 0% | 0%                    | 8%  | 8%             | 25% | 42%  | 17%  | 0%          | 17%        | 58%       | 19       |                 |           |    |
|   | Sales Staff      | 7   | 0% | 0%                    | 14% | 0%             | 14% | 57%  | 14%  | 0%          | 14%        | 60%       | 21       |                 |           |    |
|   | CEO              | 1   | 0% | 0%                    | 0%  | 0%             | 0%  | 0%   | 100% | 0%          | 100%       | 83%       | 0        |                 |           |    |
|   | Management Staff | 4   | 0% | 0%                    | 0%  | 25%            | 50% | 25%  | 0%   | 0%          | 0%         | 50%       | 13       |                 |           |    |





## Sales Baseline Performance Scores

**NA:** Not Applicable **DK:** Don't Know **1:** Strongly Disagree **2:** Disagree **3:** Somewhat Disagree **4:** Somewhat Agree **5:** Agree **6:** Strongly Agree

|   |                  |    |    |     |     |      |      |      |      |    |      |     |    |
|---|------------------|----|----|-----|-----|------|------|------|------|----|------|-----|----|
| <b>57</b> Our sales managers are adept at hiring qualified sales candidates.  | All              | 12 | 0% | 0%  | 8%  | 17%  | 50%  | 8%   | 17%  | 0% | 17%  | 51% | 19 |
|   | Sales Staff      | 7  | 0% | 0%  | 14% | 0%   | 57%  | 14%  | 14%  | 0% | 14%  | 52% | 20 |
|   | CEO              | 1  | 0% | 0%  | 0%  | 0%   | 100% | 0%   | 0%   | 0% | 0%   | 50% | 0  |
|   | Management Staff | 4  | 0% | 0%  | 0%  | 50%  | 25%  | 0%   | 25%  | 0% | 25%  | 50% | 23 |
| <b>58</b> We maintain a "People Bank" of potential hires.   | All              | 12 | 0% | 0%  | 0%  | 67%  | 17%  | 8%   | 8%   | 0% | 8%   | 43% | 16 |
|   | Sales Staff      | 7  | 0% | 0%  | 0%  | 57%  | 14%  | 14%  | 14%  | 0% | 14%  | 48% | 20 |
|   | CEO              | 1  | 0% | 0%  | 0%  | 100% | 0%   | 0%   | 0%   | 0% | 0%   | 33% | 0  |
|   | Management Staff | 4  | 0% | 0%  | 0%  | 75%  | 25%  | 0%   | 0%   | 0% | 0%   | 38% | 8  |
| <b>59</b> We consistently use accurate and detailed sales job descriptions during the interviewing process.   | All              | 12 | 0% | 8%  | 8%  | 25%  | 42%  | 0%   | 17%  | 0% | 17%  | 48% | 20 |
|   | Sales Staff      | 7  | 0% | 14% | 0%  | 14%  | 57%  | 0%   | 14%  | 0% | 14%  | 53% | 16 |
|   | CEO              | 1  | 0% | 0%  | 0%  | 0%   | 0%   | 0%   | 100% | 0% | 100% | 83% | 0  |
|   | Management Staff | 4  | 0% | 0%  | 25% | 50%  | 25%  | 0%   | 0%   | 0% | 0%   | 33% | 13 |
| <b>60</b> We have a hiring/recruiting method that is successful (versus winging it and hiring on a feel good basis).  | All              | 12 | 0% | 0%  | 0%  | 33%  | 42%  | 17%  | 8%   | 0% | 8%   | 50% | 15 |
|   | Sales Staff      | 7  | 0% | 0%  | 0%  | 14%  | 57%  | 29%  | 0%   | 0% | 0%   | 52% | 11 |
|   | CEO              | 1  | 0% | 0%  | 0%  | 0%   | 0%   | 0%   | 100% | 0% | 100% | 83% | 0  |
|   | Management Staff | 4  | 0% | 0%  | 0%  | 75%  | 25%  | 0%   | 0%   | 0% | 0%   | 38% | 8  |
| <b>61</b> We utilize an effective on-boarding and training process for new staff.   | All              | 12 | 0% | 0%  | 0%  | 50%  | 33%  | 8%   | 8%   | 0% | 8%   | 46% | 16 |
|   | Sales Staff      | 7  | 0% | 0%  | 0%  | 29%  | 57%  | 0%   | 14%  | 0% | 14%  | 50% | 16 |
|   | CEO              | 1  | 0% | 0%  | 0%  | 0%   | 0%   | 100% | 0%   | 0% | 0%   | 67% | 0  |
|   | Management Staff | 4  | 0% | 0%  | 0%  | 100% | 0%   | 0%   | 0%   | 0% | 0%   | 33% | 0  |
| <b>62</b> Each sales rep receives a formal monthly report as to their overall effectiveness.  | All              | 12 | 0% | 0%  | 0%  | 67%  | 25%  | 0%   | 8%   | 0% | 8%   | 42% | 15 |
|   | Sales Staff      | 7  | 0% | 0%  | 0%  | 43%  | 43%  | 0%   | 14%  | 0% | 14%  | 48% | 17 |
|   | CEO              | 1  | 0% | 0%  | 0%  | 100% | 0%   | 0%   | 0%   | 0% | 0%   | 33% | 0  |
|   | Management Staff | 4  | 0% | 0%  | 0%  | 100% | 0%   | 0%   | 0%   | 0% | 0%   | 33% | 0  |
| <b>63</b> We track detailed sales activity by rep (email, appointments, phone activity, quotes/proposals) to ensure that sales management has proper visibility into each sales contributors sales efforts. | All              | 12 | 0% | 0%  | 0%  | 67%  | 25%  | 8%   | 0%   | 0% | 0%   | 40% | 11 |
|   | Sales Staff      | 7  | 0% | 0%  | 0%  | 57%  | 43%  | 0%   | 0%   | 0% | 0%   | 40% | 8  |
|   | CEO              | 1  | 0% | 0%  | 0%  | 0%   | 0%   | 100% | 0%   | 0% | 0%   | 67% | 0  |
|   | Management Staff | 4  | 0% | 0%  | 0%  | 100% | 0%   | 0%   | 0%   | 0% | 0%   | 33% | 0  |
| <b>64</b> Management conducts account planning on a regular basis as well as random reviews to ensure compliance.   | All              | 12 | 0% | 0%  | 17% | 33%  | 33%  | 17%  | 0%   | 0% | 0%   | 42% | 16 |
|   | Sales Staff      | 7  | 0% | 0%  | 14% | 14%  | 43%  | 29%  | 0%   | 0% | 0%   | 48% | 17 |
|   | CEO              | 1  | 0% | 0%  | 0%  | 0%   | 100% | 0%   | 0%   | 0% | 0%   | 50% | 0  |
|   | Management Staff | 4  | 0% | 0%  | 25% | 75%  | 0%   | 0%   | 0%   | 0% | 0%   | 29% | 8  |



## Sales Baseline Performance Scores

**NA:** Not Applicable **DK:** Don't Know **1:** Strongly Disagree **2:** Disagree **3:** Somewhat Disagree **4:** Somewhat Agree **5:** Agree **6:** Strongly Agree

|  |                  |    |    |    |     |     |      |      |      |    |      |     |    |
|--|------------------|----|----|----|-----|-----|------|------|------|----|------|-----|----|
| <b>65</b> Our Sales Management has the right amount of prospect-facing involvement in our sales efforts.                         | All              | 12 | 0% | 0% | 17% | 17% | 25%  | 17%  | 25%  | 0% | 25%  | 53% | 24 |
|  | Sales Staff      | 7  | 0% | 0% | 14% | 29% | 43%  | 14%  | 0%   | 0% | 0%   | 43% | 16 |
|  | CEO              | 1  | 0% | 0% | 0%  | 0%  | 0%   | 0%   | 100% | 0% | 100% | 83% | 0  |
|  | Management Staff | 4  | 0% | 0% | 25% | 0%  | 0%   | 25%  | 50%  | 0% | 50%  | 63% | 31 |
| <b>66</b> We have effective sales meetings.  | All              | 12 | 0% | 0% | 17% | 33% | 25%  | 17%  | 8%   | 0% | 8%   | 44% | 20 |
|  | Sales Staff      | 7  | 0% | 0% | 14% | 43% | 14%  | 14%  | 14%  | 0% | 14%  | 45% | 23 |
|  | CEO              | 1  | 0% | 0% | 0%  | 0%  | 0%   | 100% | 0%   | 0% | 0%   | 67% | 0  |
|  | Management Staff | 4  | 0% | 0% | 25% | 25% | 50%  | 0%   | 0%   | 0% | 0%   | 38% | 15 |
| <b>67</b> We have the right balance and appropriate agendas for each of our sales meetings (daily/weekly/monthly and quarterly). | All              | 12 | 0% | 0% | 17% | 50% | 17%  | 17%  | 0%   | 0% | 0%   | 39% | 16 |
|  | Sales Staff      | 7  | 0% | 0% | 14% | 57% | 0%   | 29%  | 0%   | 0% | 0%   | 40% | 18 |
|  | CEO              | 1  | 0% | 0% | 0%  | 0%  | 100% | 0%   | 0%   | 0% | 0%   | 50% | 0  |
|  | Management Staff | 4  | 0% | 0% | 25% | 50% | 25%  | 0%   | 0%   | 0% | 0%   | 33% | 13 |
| <b>68</b> Our sales staff turnover is within reasonable limits.  | All              | 12 | 0% | 0% | 8%  | 17% | 17%  | 33%  | 25%  | 0% | 25%  | 58% | 21 |
|  | Sales Staff      | 7  | 0% | 0% | 14% | 0%  | 14%  | 57%  | 14%  | 0% | 14%  | 60% | 21 |
|  | CEO              | 1  | 0% | 0% | 0%  | 0%  | 0%   | 0%   | 100% | 0% | 100% | 83% | 0  |
|  | Management Staff | 4  | 0% | 0% | 0%  | 50% | 25%  | 0%   | 25%  | 0% | 25%  | 50% | 23 |

# Sales Baseline

## Performance Scores

NA: Not Applicable DK: Don't Know 1: Strongly Disagree 2: Disagree 3: Somewhat Disagree 4: Somewhat Agree 5: Agree 6: Strongly Agree



| Compensation  |                  | No. | FREQUENCY OF RESPONSE |     |     |     |     |     |      |     | Post. Score | Mean Score | Std. Dev. |                 | Mean Score | Std. Dev. |
|---|------------------|-----|-----------------------|-----|-----|-----|-----|-----|------|-----|-------------|------------|-----------|-----------------|------------|-----------|
|   |                  |     | NA                    | DK  | 1   | 2   | 3   | 4   | 5    | 6   |             |            |           |                 |            |           |
| <b>69</b> Our compensation plans drive the right activity and behaviors.  | All              | 12  | 0%                    | 0%  | 8%  | 25% | 8%  | 17% | 42%  | 0%  | 42%         | 60%        | 25        | All             | 64%        | 20        |
|   | Sales Staff      | 7   | 0%                    | 0%  | 14% | 43% | 14% | 29% | 0%   | 0%  | 0%          | 43%        | 18        | Sales Staff     | 51%        | 17        |
|   | CEO              | 1   | 0%                    | 0%  | 0%  | 0%  | 0%  | 0%  | 100% | 0%  | 100%        | 83%        | 0         | CEO             | 81%        | 5         |
|   | Management Staff | 4   | 0%                    | 0%  | 0%  | 0%  | 0%  | 0%  | 100% | 0%  | 100%        | 83%        | 0         | Management S... | 81%        | 8         |
| <b>70</b> Our compensation plan incentivizes the right things (most profitable service/product - a lead in solution, etc.). | All              | 12  | 0%                    | 0%  | 0%  | 25% | 8%  | 17% | 50%  | 0%  | 50%         | 65%        | 21        |                 |            |           |
|   | Sales Staff      | 7   | 0%                    | 0%  | 0%  | 43% | 14% | 29% | 14%  | 0%  | 14%         | 52%        | 20        |                 |            |           |
|   | CEO              | 1   | 0%                    | 0%  | 0%  | 0%  | 0%  | 0%  | 100% | 0%  | 100%        | 83%        | 0         |                 |            |           |
|   | Management Staff | 4   | 0%                    | 0%  | 0%  | 0%  | 0%  | 0%  | 100% | 0%  | 100%        | 83%        | 0         |                 |            |           |
| <b>71</b> Our incentive plan motivates the sales staff to sell as much as possible.   | All              | 12  | 0%                    | 0%  | 0%  | 33% | 17% | 8%  | 33%  | 8%  | 42%         | 61%        | 24        |                 |            |           |
|   | Sales Staff      | 7   | 0%                    | 0%  | 0%  | 57% | 29% | 14% | 0%   | 0%  | 0%          | 43%        | 13        |                 |            |           |
|   | CEO              | 1   | 0%                    | 0%  | 0%  | 0%  | 0%  | 0%  | 100% | 0%  | 100%        | 83%        | 0         |                 |            |           |
|   | Management Staff | 4   | 0%                    | 0%  | 0%  | 0%  | 0%  | 0%  | 75%  | 25% | 100%        | 88%        | 8         |                 |            |           |
| <b>72</b> Our Compensation plans are fair to employer and employee alike.   | All              | 12  | 0%                    | 8%  | 0%  | 17% | 8%  | 25% | 42%  | 0%  | 42%         | 67%        | 19        |                 |            |           |
|   | Sales Staff      | 7   | 0%                    | 14% | 0%  | 29% | 14% | 43% | 0%   | 0%  | 0%          | 53%        | 16        |                 |            |           |
|   | CEO              | 1   | 0%                    | 0%  | 0%  | 0%  | 0%  | 0%  | 100% | 0%  | 100%        | 83%        | 0         |                 |            |           |
|   | Management Staff | 4   | 0%                    | 0%  | 0%  | 0%  | 0%  | 0%  | 100% | 0%  | 100%        | 83%        | 0         |                 |            |           |
| <b>73</b> Incentive reports are prepared timely and accurately.   | All              | 12  | 0%                    | 0%  | 0%  | 25% | 17% | 8%  | 50%  | 0%  | 50%         | 64%        | 22        |                 |            |           |
|   | Sales Staff      | 7   | 0%                    | 0%  | 0%  | 43% | 29% | 14% | 14%  | 0%  | 14%         | 50%        | 19        |                 |            |           |
|   | CEO              | 1   | 0%                    | 0%  | 0%  | 0%  | 0%  | 0%  | 100% | 0%  | 100%        | 83%        | 0         |                 |            |           |
|   | Management Staff | 4   | 0%                    | 0%  | 0%  | 0%  | 0%  | 0%  | 100% | 0%  | 100%        | 83%        | 0         |                 |            |           |
| <b>74</b> Our incentive plans are easy to understand.   | All              | 12  | 0%                    | 0%  | 0%  | 17% | 33% | 8%  | 42%  | 0%  | 42%         | 63%        | 20        |                 |            |           |
|   | Sales Staff      | 7   | 0%                    | 0%  | 0%  | 29% | 57% | 0%  | 14%  | 0%  | 14%         | 50%        | 16        |                 |            |           |
|   | CEO              | 1   | 0%                    | 0%  | 0%  | 0%  | 0%  | 0%  | 100% | 0%  | 100%        | 83%        | 0         |                 |            |           |
|   | Management Staff | 4   | 0%                    | 0%  | 0%  | 0%  | 0%  | 25% | 75%  | 0%  | 75%         | 79%        | 8         |                 |            |           |
| <b>75</b> Our compensation expenses fall within our expected budget allocation.   | All              | 12  | 0%                    | 25% | 0%  | 0%  | 8%  | 25% | 42%  | 0%  | 42%         | 74%        | 12        |                 |            |           |
|   | Sales Staff      | 7   | 0%                    | 43% | 0%  | 0%  | 14% | 43% | 0%   | 0%  | 0%          | 63%        | 8         |                 |            |           |
|   | CEO              | 1   | 0%                    | 0%  | 0%  | 0%  | 0%  | 0%  | 100% | 0%  | 100%        | 83%        | 0         |                 |            |           |
|   | Management Staff | 4   | 0%                    | 0%  | 0%  | 0%  | 0%  | 0%  | 100% | 0%  | 100%        | 83%        | 0         |                 |            |           |



## Sales Baseline Performance Scores

**NA:** Not Applicable **DK:** Don't Know **1:** Strongly Disagree **2:** Disagree **3:** Somewhat Disagree **4:** Somewhat Agree **5:** Agree **6:** Strongly Agree

**76** We recognize our top performers.

|                  |    |    |    |    |    |     |     |      |    |      |     |    |
|------------------|----|----|----|----|----|-----|-----|------|----|------|-----|----|
| All              | 12 | 0% | 0% | 0% | 0% | 42% | 17% | 42%  | 0% | 42%  | 67% | 15 |
| Sales Staff      | 7  | 0% | 0% | 0% | 0% | 71% | 14% | 14%  | 0% | 14%  | 57% | 13 |
| CEO              | 1  | 0% | 0% | 0% | 0% | 0%  | 0%  | 100% | 0% | 100% | 83% | 0  |
| Management Staff | 4  | 0% | 0% | 0% | 0% | 0%  | 25% | 75%  | 0% | 75%  | 79% | 8  |

**77** We utilize non-direct compensation programs to create excitement and enthusiasm.

|                  |    |    |    |    |     |     |      |     |     |     |     |    |
|------------------|----|----|----|----|-----|-----|------|-----|-----|-----|-----|----|
| All              | 12 | 0% | 0% | 0% | 8%  | 42% | 33%  | 8%  | 8%  | 17% | 61% | 17 |
| Sales Staff      | 7  | 0% | 0% | 0% | 14% | 57% | 14%  | 0%  | 14% | 14% | 57% | 21 |
| CEO              | 1  | 0% | 0% | 0% | 0%  | 0%  | 100% | 0%  | 0%  | 0%  | 67% | 0  |
| Management Staff | 4  | 0% | 0% | 0% | 0%  | 25% | 50%  | 25% | 0%  | 25% | 67% | 13 |

# Sales Baseline

## Performance Scores

NA: Not Applicable DK: Don't Know 1: Strongly Disagree 2: Disagree 3: Somewhat Disagree 4: Somewhat Agree 5: Agree 6: Strongly Agree

|   |                  | 50% |    | 50% |     | Not Applicable |     | Don't Know |      | Disagree |             | Agree      |           |                 |           |    |
|---|------------------|-----|----|-----|-----|----------------|-----|------------|------|----------|-------------|------------|-----------|-----------------|-----------|----|
| Infrastructure  |                  | No. | NA | DK  | 1   | 2              | 3   | 4          | 5    | 6        | Post. Score | Mean Score | Std. Dev. | Mean Score      | Std. Dev. |    |
| <b>78</b> We have a centralized database Sales Force Automation (SFA) or Customer Relationship Management System (CRM). | All              | 12  | 0% | 0%  | 8%  | 8%             | 8%  | 50%        | 17%  | 8%       | 25%         | 64%        | 22        | All             | 56%       | 20 |
|   | Sales Staff      | 7   | 0% | 0%  | 14% | 0%             | 0%  | 57%        | 29%  | 0%       | 29%         | 64%        | 22        | Sales Staff     | 55%       | 20 |
|   | CEO              | 1   | 0% | 0%  | 0%  | 0%             | 0%  | 100%       | 0%   | 0%       | 0%          | 67%        | 0         | CEO             | 66%       | 17 |
|   | Management Staff | 4   | 0% | 0%  | 0%  | 25%            | 25% | 25%        | 0%   | 25%      | 25%         | 63%        | 28        | Management S... | 55%       | 20 |
| <b>79</b> We have an effective email marketing system.  | All              | 12  | 0% | 0%  | 0%  | 17%            | 42% | 17%        | 25%  | 0%       | 25%         | 58%        | 18        |                 |           |    |
|   | Sales Staff      | 7   | 0% | 0%  | 0%  | 14%            | 43% | 14%        | 29%  | 0%       | 29%         | 60%        | 18        |                 |           |    |
|   | CEO              | 1   | 0% | 0%  | 0%  | 0%             | 0%  | 100%       | 0%   | 0%       | 0%          | 67%        | 0         |                 |           |    |
|   | Management Staff | 4   | 0% | 0%  | 0%  | 25%            | 50% | 0%         | 25%  | 0%       | 25%         | 54%        | 20        |                 |           |    |
| <b>80</b> Our SFA, CRM, and email marketing interface effectively together.   | All              | 12  | 0% | 0%  | 0%  | 58%            | 8%  | 25%        | 8%   | 0%       | 8%          | 47%        | 18        |                 |           |    |
|   | Sales Staff      | 7   | 0% | 0%  | 0%  | 71%            | 0%  | 14%        | 14%  | 0%       | 14%         | 45%        | 20        |                 |           |    |
|   | CEO              | 1   | 0% | 0%  | 0%  | 0%             | 0%  | 100%       | 0%   | 0%       | 0%          | 67%        | 0         |                 |           |    |
|   | Management Staff | 4   | 0% | 0%  | 0%  | 50%            | 25% | 25%        | 0%   | 0%       | 0%          | 46%        | 15        |                 |           |    |
| <b>81</b> Our system provides management with critical, decision-making information.                                    | All              | 12  | 0% | 0%  | 0%  | 42%            | 25% | 25%        | 8%   | 0%       | 8%          | 50%        | 17        |                 |           |    |
|   | Sales Staff      | 7   | 0% | 0%  | 0%  | 43%            | 14% | 29%        | 14%  | 0%       | 14%         | 52%        | 20        |                 |           |    |
|   | CEO              | 1   | 0% | 0%  | 0%  | 0%             | 0%  | 100%       | 0%   | 0%       | 0%          | 50%        | 0         |                 |           |    |
|   | Management Staff | 4   | 0% | 0%  | 0%  | 50%            | 25% | 25%        | 0%   | 0%       | 0%          | 46%        | 15        |                 |           |    |
| <b>82</b> We have consistent and effective processes for collecting prospect intelligence (Hoovers, Factiva, etc.).     | All              | 12  | 0% | 0%  | 0%  | 58%            | 17% | 17%        | 8%   | 0%       | 8%          | 46%        | 17        |                 |           |    |
|   | Sales Staff      | 7   | 0% | 0%  | 0%  | 57%            | 14% | 14%        | 14%  | 0%       | 14%         | 48%        | 20        |                 |           |    |
|   | CEO              | 1   | 0% | 0%  | 0%  | 100%           | 0%  | 0%         | 0%   | 0%       | 0%          | 33%        | 0         |                 |           |    |
|   | Management Staff | 4   | 0% | 0%  | 0%  | 50%            | 25% | 25%        | 0%   | 0%       | 0%          | 46%        | 15        |                 |           |    |
| <b>83</b> We have an effective sales forecasting process.   | All              | 12  | 0% | 0%  | 0%  | 58%            | 25% | 8%         | 8%   | 0%       | 8%          | 44%        | 16        |                 |           |    |
|   | Sales Staff      | 7   | 0% | 0%  | 0%  | 71%            | 29% | 0%         | 0%   | 0%       | 0%          | 38%        | 8         |                 |           |    |
|   | CEO              | 1   | 0% | 0%  | 0%  | 0%             | 0%  | 0%         | 100% | 0%       | 100%        | 83%        | 0         |                 |           |    |
|   | Management Staff | 4   | 0% | 0%  | 0%  | 50%            | 25% | 25%        | 0%   | 0%       | 0%          | 46%        | 15        |                 |           |    |
| <b>84</b> Placing an order is easy for clients and/or internal staff.   | All              | 12  | 0% | 0%  | 0%  | 0%             | 8%  | 33%        | 58%  | 0%       | 58%         | 75%        | 11        |                 |           |    |
|   | Sales Staff      | 7   | 0% | 0%  | 0%  | 0%             | 0%  | 57%        | 43%  | 0%       | 43%         | 74%        | 8         |                 |           |    |
|   | CEO              | 1   | 0% | 0%  | 0%  | 0%             | 0%  | 0%         | 100% | 0%       | 100%        | 83%        | 0         |                 |           |    |
|   | Management Staff | 4   | 0% | 0%  | 0%  | 0%             | 25% | 0%         | 75%  | 0%       | 75%         | 75%        | 16        |                 |           |    |



**Sales Baseline  
Performance Scores**

**NA:** Not Applicable **DK:** Don't Know **1:** Strongly Disagree **2:** Disagree **3:** Somewhat Disagree **4:** Somewhat Agree **5:** Agree **6:** Strongly Agree

**85** Our pricing model is well defined and understood.

|                  |    |    |    |    |     |     |     |      |     |      |     |    |
|------------------|----|----|----|----|-----|-----|-----|------|-----|------|-----|----|
| All              | 12 | 0% | 0% | 0% | 8%  | 25% | 33% | 25%  | 8%  | 33%  | 67% | 18 |
| Sales Staff      | 7  | 0% | 0% | 0% | 14% | 29% | 43% | 0%   | 14% | 14%  | 62% | 20 |
| CEO              | 1  | 0% | 0% | 0% | 0%  | 0%  | 0%  | 100% | 0%  | 100% | 83% | 0  |
| Management Staff | 4  | 0% | 0% | 0% | 0%  | 25% | 25% | 50%  | 0%  | 50%  | 71% | 15 |

# Sales Baseline

## Performance Scores

NA: Not Applicable DK: Don't Know 1: Strongly Disagree 2: Disagree 3: Somewhat Disagree 4: Somewhat Agree 5: Agree 6: Strongly Agree

|   |                  | 45% |    | 55% |     | Not Applicable |     | Don't Know |      | Disagree |             | Agree      |           |                 |           |    |
|---|------------------|-----|----|-----|-----|----------------|-----|------------|------|----------|-------------|------------|-----------|-----------------|-----------|----|
| Prof Serv   |                  | No. | NA | DK  | 1   | 2              | 3   | 4          | 5    | 6        | Post. Score | Mean Score | Std. Dev. | Mean Score      | Std. Dev. |    |
| <b>86</b> We have a methodology for delivering excellent solutions.                       | All              | 12  | 0% | 0%  | 0%  | 17%            | 0%  | 50%        | 33%  | 0%       | 33%         | 67%        | 17        | All             | 61%       | 19 |
|   | Sales Staff      | 7   | 0% | 0%  | 0%  | 29%            | 0%  | 57%        | 14%  | 0%       | 14%         | 60%        | 18        | Sales Staff     | 60%       | 19 |
|   | CEO              | 1   | 0% | 0%  | 0%  | 0%             | 0%  | 0%         | 100% | 0%       | 100%        | 83%        | 0         | CEO             | 75%       | 8  |
|   | Management Staff | 4   | 0% | 0%  | 0%  | 0%             | 0%  | 50%        | 50%  | 0%       | 50%         | 75%        | 9         | Management S... | 59%       | 20 |
| <b>87</b> We have revenue generating services we offer in the "pre-sales" environment.    | All              | 12  | 0% | 0%  | 0%  | 17%            | 33% | 42%        | 8%   | 0%       | 8%          | 57%        | 15        |                 |           |    |
|   | Sales Staff      | 7   | 0% | 0%  | 0%  | 14%            | 43% | 29%        | 14%  | 0%       | 14%         | 57%        | 16        |                 |           |    |
|   | CEO              | 1   | 0% | 0%  | 0%  | 0%             | 0%  | 100%       | 0%   | 0%       | 0%          | 67%        | 0         |                 |           |    |
|   | Management Staff | 4   | 0% | 0%  | 0%  | 25%            | 25% | 50%        | 0%   | 0%       | 0%          | 54%        | 15        |                 |           |    |
| <b>88</b> Our professional service offerings are a key to our winning business.           | All              | 12  | 0% | 0%  | 8%  | 0%             | 0%  | 42%        | 50%  | 0%       | 50%         | 71%        | 18        |                 |           |    |
|   | Sales Staff      | 7   | 0% | 0%  | 0%  | 0%             | 0%  | 43%        | 57%  | 0%       | 57%         | 76%        | 8         |                 |           |    |
|   | CEO              | 1   | 0% | 0%  | 0%  | 0%             | 0%  | 0%         | 100% | 0%       | 100%        | 83%        | 0         |                 |           |    |
|   | Management Staff | 4   | 0% | 0%  | 25% | 0%             | 0%  | 50%        | 25%  | 0%       | 25%         | 58%        | 28        |                 |           |    |
| <b>89</b> Our project management process includes effectively written Statements of Work. | All              | 12  | 0% | 0%  | 8%  | 25%            | 8%  | 8%         | 33%  | 17%      | 50%         | 64%        | 29        |                 |           |    |
|   | Sales Staff      | 7   | 0% | 0%  | 0%  | 29%            | 14% | 14%        | 14%  | 29%      | 43%         | 67%        | 28        |                 |           |    |
|   | CEO              | 1   | 0% | 0%  | 0%  | 0%             | 0%  | 0%         | 100% | 0%       | 100%        | 83%        | 0         |                 |           |    |
|   | Management Staff | 4   | 0% | 0%  | 25% | 25%            | 0%  | 0%         | 50%  | 0%       | 50%         | 54%        | 34        |                 |           |    |
| <b>90</b> Our Project Managers are effective at managing to the Statement of Work.        | All              | 12  | 0% | 0%  | 8%  | 25%            | 33% | 17%        | 8%   | 8%       | 17%         | 53%        | 23        |                 |           |    |
|   | Sales Staff      | 7   | 0% | 0%  | 0%  | 29%            | 43% | 0%         | 14%  | 14%      | 29%         | 57%        | 25        |                 |           |    |
|   | CEO              | 1   | 0% | 0%  | 0%  | 0%             | 0%  | 100%       | 0%   | 0%       | 0%          | 67%        | 0         |                 |           |    |
|   | Management Staff | 4   | 0% | 0%  | 25% | 25%            | 25% | 25%        | 0%   | 0%       | 0%          | 42%        | 21        |                 |           |    |
| <b>91</b> We use a Change Order Process to address items outside the Statement of Work.   | All              | 12  | 0% | 0%  | 8%  | 8%             | 33% | 33%        | 17%  | 0%       | 17%         | 57%        | 19        |                 |           |    |
|   | Sales Staff      | 7   | 0% | 0%  | 0%  | 14%            | 57% | 0%         | 29%  | 0%       | 29%         | 57%        | 18        |                 |           |    |
|   | CEO              | 1   | 0% | 0%  | 0%  | 0%             | 0%  | 100%       | 0%   | 0%       | 0%          | 67%        | 0         |                 |           |    |
|   | Management Staff | 4   | 0% | 0%  | 25% | 0%             | 0%  | 75%        | 0%   | 0%       | 0%          | 54%        | 25        |                 |           |    |
| <b>92</b> We have excellent internal and external project based communication.            | All              | 12  | 0% | 0%  | 0%  | 8%             | 42% | 25%        | 25%  | 0%       | 25%         | 61%        | 16        |                 |           |    |
|   | Sales Staff      | 7   | 0% | 0%  | 0%  | 14%            | 43% | 14%        | 29%  | 0%       | 29%         | 60%        | 18        |                 |           |    |
|   | CEO              | 1   | 0% | 0%  | 0%  | 0%             | 0%  | 100%       | 0%   | 0%       | 0%          | 67%        | 0         |                 |           |    |
|   | Management Staff | 4   | 0% | 0%  | 0%  | 0%             | 50% | 25%        | 25%  | 0%       | 25%         | 63%        | 15        |                 |           |    |



## Sales Baseline Performance Scores

**NA:** Not Applicable **DK:** Don't Know **1:** Strongly Disagree **2:** Disagree **3:** Somewhat Disagree **4:** Somewhat Agree **5:** Agree **6:** Strongly Agree

|   |                  |    |    |    |     |     |     |      |      |    |      |     |    |
|---|------------------|----|----|----|-----|-----|-----|------|------|----|------|-----|----|
| <b>93</b> Our internal tracking systems for professional services are effective.                | All              | 12 | 0% | 0% | 8%  | 8%  | 33% | 33%  | 17%  | 0% | 17%  | 57% | 19 |
|   | Sales Staff      | 7  | 0% | 0% | 14% | 0%  | 57% | 14%  | 14%  | 0% | 14%  | 52% | 20 |
|   | CEO              | 1  | 0% | 0% | 0%  | 0%  | 0%  | 0%   | 100% | 0% | 100% | 83% | 0  |
|   | Management Staff | 4  | 0% | 0% | 0%  | 25% | 0%  | 75%  | 0%   | 0% | 0%   | 58% | 16 |
| <b>94</b> Internal tracking systems are used consistently by the staff.                         | All              | 12 | 0% | 0% | 0%  | 0%  | 50% | 17%  | 33%  | 0% | 33%  | 64% | 15 |
|   | Sales Staff      | 7  | 0% | 0% | 0%  | 0%  | 71% | 0%   | 29%  | 0% | 29%  | 60% | 16 |
|   | CEO              | 1  | 0% | 0% | 0%  | 0%  | 0%  | 0%   | 100% | 0% | 100% | 83% | 0  |
|   | Management Staff | 4  | 0% | 0% | 0%  | 0%  | 25% | 50%  | 25%  | 0% | 25%  | 67% | 13 |
| <b>95</b> We have the information we need to know in a timely manner if a project is off-track. | All              | 12 | 0% | 0% | 0%  | 0%  | 42% | 42%  | 17%  | 0% | 17%  | 63% | 12 |
|   | Sales Staff      | 7  | 0% | 0% | 0%  | 0%  | 71% | 14%  | 14%  | 0% | 14%  | 57% | 13 |
|   | CEO              | 1  | 0% | 0% | 0%  | 0%  | 0%  | 100% | 0%   | 0% | 0%   | 67% | 0  |
|   | Management Staff | 4  | 0% | 0% | 0%  | 0%  | 0%  | 75%  | 25%  | 0% | 25%  | 71% | 8  |



# Sales Baseline

## Performance Scores

NA: Not Applicable DK: Don't Know 1: Strongly Disagree 2: Disagree 3: Somewhat Disagree 4: Somewhat Agree 5: Agree 6: Strongly Agree

|   |                  | 57% |    | 43% |     | Not Applicable |      |      |     |     | Don't Know  |            | Disagree  |                 | Agree     |    |
|---|------------------|-----|----|-----|-----|----------------|------|------|-----|-----|-------------|------------|-----------|-----------------|-----------|----|
| Training  |                  | No. | NA | DK  | 1   | 2              | 3    | 4    | 5   | 6   | Post. Score | Mean Score | Std. Dev. | Mean Score      | Std. Dev. |    |
| <b>96</b> We have a culture that promotes self improvement and learning.                        | All              | 12  | 0% | 0%  | 0%  | 8%             | 17%  | 58%  | 8%  | 8%  | 17%         | 65%        | 16        | All             | 47%       | 19 |
|   | Sales Staff      | 7   | 0% | 0%  | 0%  | 14%            | 14%  | 57%  | 0%  | 14% | 14%         | 64%        | 20        | Sales Staff     | 50%       | 19 |
|   | CEO              | 1   | 0% | 0%  | 0%  | 0%             | 0%   | 100% | 0%  | 0%  | 0%          | 67%        | 0         | CEO             | 52%       | 12 |
|   | Management Staff | 4   | 0% | 0%  | 0%  | 0%             | 25%  | 50%  | 25% | 0%  | 25%         | 67%        | 13        | Management S... | 40%       | 19 |
| <b>97</b> Product, Industry and Skill training is a normal part of our departmental activities. | All              | 12  | 0% | 0%  | 0%  | 25%            | 42%  | 17%  | 8%  | 8%  | 17%         | 56%        | 20        |                 |           |    |
|   | Sales Staff      | 7   | 0% | 0%  | 0%  | 14%            | 57%  | 14%  | 0%  | 14% | 14%         | 57%        | 21        |                 |           |    |
|   | CEO              | 1   | 0% | 0%  | 0%  | 0%             | 100% | 0%   | 0%  | 0%  | 0%          | 50%        | 0         |                 |           |    |
|   | Management Staff | 4   | 0% | 0%  | 0%  | 50%            | 0%   | 25%  | 25% | 0%  | 25%         | 54%        | 25        |                 |           |    |
| <b>98</b> We effectively use role playing in our sales preparation.                             | All              | 12  | 0% | 0%  | 8%  | 67%            | 17%  | 8%   | 0%  | 0%  | 0%          | 38%        | 12        |                 |           |    |
|   | Sales Staff      | 7   | 0% | 0%  | 0%  | 57%            | 29%  | 14%  | 0%  | 0%  | 0%          | 43%        | 13        |                 |           |    |
|   | CEO              | 1   | 0% | 0%  | 0%  | 100%           | 0%   | 0%   | 0%  | 0%  | 0%          | 33%        | 0         |                 |           |    |
|   | Management Staff | 4   | 0% | 0%  | 25% | 75%            | 0%   | 0%   | 0%  | 0%  | 0%          | 29%        | 8         |                 |           |    |
| <b>99</b> We utilize independent assessment tools for our personal development initiatives.     | All              | 12  | 0% | 0%  | 8%  | 58%            | 17%  | 17%  | 0%  | 0%  | 0%          | 40%        | 15        |                 |           |    |
|   | Sales Staff      | 7   | 0% | 0%  | 0%  | 57%            | 14%  | 29%  | 0%  | 0%  | 0%          | 45%        | 15        |                 |           |    |
|   | CEO              | 1   | 0% | 0%  | 0%  | 0%             | 100% | 0%   | 0%  | 0%  | 0%          | 50%        | 0         |                 |           |    |
|   | Management Staff | 4   | 0% | 0%  | 25% | 75%            | 0%   | 0%   | 0%  | 0%  | 0%          | 29%        | 8         |                 |           |    |
| <b>100</b> Each team member has a personal development plan.                                    | All              | 12  | 0% | 0%  | 8%  | 58%            | 25%  | 0%   | 8%  | 0%  | 8%          | 40%        | 16        |                 |           |    |
|   | Sales Staff      | 7   | 0% | 0%  | 0%  | 57%            | 29%  | 0%   | 14% | 0%  | 14%         | 45%        | 18        |                 |           |    |
|   | CEO              | 1   | 0% | 0%  | 0%  | 0%             | 100% | 0%   | 0%  | 0%  | 0%          | 50%        | 0         |                 |           |    |
|   | Management Staff | 4   | 0% | 0%  | 25% | 75%            | 0%   | 0%   | 0%  | 0%  | 0%          | 29%        | 8         |                 |           |    |
| <b>101</b> Time and funds are allocated for external development opportunities.                 | All              | 12  | 0% | 0%  | 0%  | 50%            | 33%  | 8%   | 0%  | 8%  | 8%          | 47%        | 19        |                 |           |    |
|   | Sales Staff      | 7   | 0% | 0%  | 0%  | 43%            | 43%  | 0%   | 0%  | 14% | 14%         | 50%        | 23        |                 |           |    |
|   | CEO              | 1   | 0% | 0%  | 0%  | 0%             | 0%   | 100% | 0%  | 0%  | 0%          | 67%        | 0         |                 |           |    |
|   | Management Staff | 4   | 0% | 0%  | 0%  | 75%            | 25%  | 0%   | 0%  | 0%  | 0%          | 38%        | 8         |                 |           |    |



## Sales Baseline Performance Scores

NA: Not Applicable DK: Don't Know 1: Strongly Disagree 2: Disagree 3: Somewhat Disagree 4: Somewhat Agree 5: Agree 6: Strongly Agree

|  |                  |     | 19%                   | 37% | 44% | Not Applicable |      |      |      |     | Don't Know  |            | Disagree  |                 | Agree      |           |
|--|------------------|-----|-----------------------|-----|-----|----------------|------|------|------|-----|-------------|------------|-----------|-----------------|------------|-----------|
| Bus. Mgmt  |                  | No. | FREQUENCY OF RESPONSE |     |     |                |      |      |      |     | Post. Score | Mean Score | Std. Dev. |                 | Mean Score | Std. Dev. |
|  |                  |     | NA                    | DK  | 1   | 2              | 3    | 4    | 5    | 6   |             |            |           |                 |            |           |
| <b>102</b> We commit time for the strategic planning review and process.   | All              | 12  | 0%                    | 0%  | 0%  | 8%             | 0%   | 67%  | 25%  | 0%  | 25%         | 68%        | 13        | All             | 66%        | 18        |
|  | Sales Staff      | 7   | 0%                    | 0%  | 0%  | 0%             | 0%   | 57%  | 43%  | 0%  | 43%         | 74%        | 8         | Sales Staff     | 68%        | 20        |
|  | CEO              | 1   | 0%                    | 0%  | 0%  | 0%             | 0%   | 100% | 0%   | 0%  | 0%          | 67%        | 0         | CEO             | 63%        | 15        |
|  | Management Staff | 4   | 0%                    | 0%  | 0%  | 25%            | 0%   | 75%  | 0%   | 0%  | 0%          | 58%        | 16        | Management S... | 64%        | 18        |
| <b>103</b> We prepare an annual business plan which incorporates a roll-up from our marketing, sales, production and finance/administrative departments. | All              | 12  | 0%                    | 33% | 0%  | 17%            | 25%  | 8%   | 17%  | 0%  | 17%         | 56%        | 19        |                 |            |           |
|  | Sales Staff      | 7   | 0%                    | 57% | 0%  | 0%             | 14%  | 0%   | 29%  | 0%  | 29%         | 72%        | 19        |                 |            |           |
|  | CEO              | 1   | 0%                    | 0%  | 0%  | 0%             | 100% | 0%   | 0%   | 0%  | 0%          | 50%        | 0         |                 |            |           |
|  | Management Staff | 4   | 0%                    | 0%  | 0%  | 50%            | 25%  | 25%  | 0%   | 0%  | 0%          | 46%        | 15        |                 |            |           |
| <b>104</b> We have weekly/monthly meetings which include the sales, production and finance departments to forecast revenue/profit.                       | All              | 12  | 0%                    | 33% | 8%  | 25%            | 17%  | 8%   | 8%   | 0%  | 8%          | 46%        | 21        |                 |            |           |
|  | Sales Staff      | 7   | 0%                    | 57% | 0%  | 14%            | 0%   | 14%  | 14%  | 0%  | 14%         | 61%        | 25        |                 |            |           |
|  | CEO              | 1   | 0%                    | 0%  | 0%  | 0%             | 100% | 0%   | 0%   | 0%  | 0%          | 50%        | 0         |                 |            |           |
|  | Management Staff | 4   | 0%                    | 0%  | 25% | 50%            | 25%  | 0%   | 0%   | 0%  | 0%          | 33%        | 13        |                 |            |           |
| <b>105</b> We have an effective cash flow forecasting process.   | All              | 12  | 0%                    | 33% | 0%  | 0%             | 17%  | 8%   | 33%  | 8%  | 42%         | 75%        | 17        |                 |            |           |
|  | Sales Staff      | 7   | 0%                    | 57% | 0%  | 0%             | 0%   | 0%   | 29%  | 14% | 43%         | 89%        | 9         |                 |            |           |
|  | CEO              | 1   | 0%                    | 0%  | 0%  | 0%             | 100% | 0%   | 0%   | 0%  | 0%          | 50%        | 0         |                 |            |           |
|  | Management Staff | 4   | 0%                    | 0%  | 0%  | 0%             | 25%  | 25%  | 50%  | 0%  | 50%         | 71%        | 15        |                 |            |           |
| <b>106</b> Our sales and cash flow forecasts are consistently accurate.  | All              | 12  | 0%                    | 33% | 0%  | 0%             | 17%  | 33%  | 17%  | 0%  | 17%         | 67%        | 12        |                 |            |           |
|  | Sales Staff      | 7   | 0%                    | 57% | 0%  | 0%             | 0%   | 14%  | 29%  | 0%  | 29%         | 78%        | 9         |                 |            |           |
|  | CEO              | 1   | 0%                    | 0%  | 0%  | 0%             | 100% | 0%   | 0%   | 0%  | 0%          | 50%        | 0         |                 |            |           |
|  | Management Staff | 4   | 0%                    | 0%  | 0%  | 0%             | 25%  | 75%  | 0%   | 0%  | 0%          | 63%        | 8         |                 |            |           |
| <b>107</b> Our invoicing process is accurate, fast and, efficient.   | All              | 12  | 0%                    | 0%  | 0%  | 8%             | 0%   | 33%  | 58%  | 0%  | 58%         | 74%        | 15        |                 |            |           |
|  | Sales Staff      | 7   | 0%                    | 0%  | 0%  | 14%            | 0%   | 29%  | 57%  | 0%  | 57%         | 71%        | 18        |                 |            |           |
|  | CEO              | 1   | 0%                    | 0%  | 0%  | 0%             | 0%   | 0%   | 100% | 0%  | 100%        | 83%        | 0         |                 |            |           |
|  | Management Staff | 4   | 0%                    | 0%  | 0%  | 0%             | 0%   | 50%  | 50%  | 0%  | 50%         | 75%        | 9         |                 |            |           |



## Sales Baseline Performance Scores

**NA:** Not Applicable **DK:** Don't Know **1:** Strongly Disagree **2:** Disagree **3:** Somewhat Disagree **4:** Somewhat Agree **5:** Agree **6:** Strongly Agree

|  |                  |    |    |     |     |     |      |      |      |    |      |     |    |
|--|------------------|----|----|-----|-----|-----|------|------|------|----|------|-----|----|
| <b>108</b> Our revenue is safely spread between customers i.e. no single customer makes up an unacceptably large % of our sales. | All              | 12 | 0% | 25% | 8%  | 0%  | 0%   | 8%   | 58%  | 0% | 58%  | 74% | 22 |
|  | Sales Staff      | 7  | 0% | 43% | 14% | 0%  | 0%   | 0%   | 43%  | 0% | 43%  | 67% | 33 |
|  | CEO              | 1  | 0% | 0%  | 0%  | 0%  | 0%   | 0%   | 100% | 0% | 100% | 83% | 0  |
|  | Management Staff | 4  | 0% | 0%  | 0%  | 0%  | 0%   | 25%  | 75%  | 0% | 75%  | 79% | 8  |
|  |                  |    |    |     |     |     |      |      |      |    |      |     |    |
| <b>109</b> Our average Accounts Receivable collection time is acceptable.  | All              | 12 | 0% | 33% | 0%  | 0%  | 0%   | 17%  | 50%  | 0% | 50%  | 79% | 7  |
|  | Sales Staff      | 7  | 0% | 57% | 0%  | 0%  | 0%   | 14%  | 29%  | 0% | 29%  | 78% | 9  |
|  | CEO              | 1  | 0% | 0%  | 0%  | 0%  | 0%   | 0%   | 100% | 0% | 100% | 83% | 0  |
|  | Management Staff | 4  | 0% | 0%  | 0%  | 0%  | 0%   | 25%  | 75%  | 0% | 75%  | 79% | 8  |
|  |                  |    |    |     |     |     |      |      |      |    |      |     |    |
| <b>110</b> Our accounting system effectively supports our business.  | All              | 12 | 0% | 0%  | 0%  | 8%  | 25%  | 17%  | 50%  | 0% | 50%  | 68% | 18 |
|  | Sales Staff      | 7  | 0% | 0%  | 0%  | 14% | 43%  | 0%   | 43%  | 0% | 43%  | 62% | 20 |
|  | CEO              | 1  | 0% | 0%  | 0%  | 0%  | 0%   | 100% | 0%   | 0% | 0%   | 67% | 0  |
|  | Management Staff | 4  | 0% | 0%  | 0%  | 0%  | 0%   | 25%  | 75%  | 0% | 75%  | 79% | 8  |
|  |                  |    |    |     |     |     |      |      |      |    |      |     |    |
| <b>111</b> We have explicit Key Performance Indicators that we use to measure our business performance.                          | All              | 12 | 0% | 8%  | 0%  | 33% | 17%  | 33%  | 8%   | 0% | 8%   | 53% | 17 |
|  | Sales Staff      | 7  | 0% | 14% | 0%  | 57% | 0%   | 14%  | 14%  | 0% | 14%  | 47% | 22 |
|  | CEO              | 1  | 0% | 0%  | 0%  | 0%  | 100% | 0%   | 0%   | 0% | 0%   | 50% | 0  |
|  | Management Staff | 4  | 0% | 0%  | 0%  | 0%  | 25%  | 75%  | 0%   | 0% | 0%   | 63% | 8  |
|  |                  |    |    |     |     |     |      |      |      |    |      |     |    |



**Market Planning, Process and Tools**

The marketing staff has been in flux over the last 12 months. Leadership changes have affected the budget, etc.

Example - events