

# SALES MANAGEMENT SUCCESS CHECKLIST

If your inside sales team is now working from home, go through these questions as a starting point to helping your team succeed.



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## LEADS/MARKETING

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- ☐ Do you still have your previous source of leads available?
- ☐ Are there new lead sources that would better fit your WFH team, or the current climate of your prospects?  
(as in...now that most people are at home, digital ads could be more effective)

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## INBOUND LEAD DISTRIBUTION

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- ☐ How are you distributing leads to your reps?
- ☐ How many leads do they need per day/week now, versus before?  
(Might take 5x or 10x more leads to achieve the same number of contacts/conversations/demos/deals)

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## LEAD MANAGEMENT

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- ☐ How are you tracking whether the leads are being contacted/followed up on?
- ☐ What is the best cadence for follow ups to use right now?
- ☐ Can you use videos more to connect with your prospects?  
(There are many free video recording programs out there, which could then be pasted into individual or mass emails)

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## REFERRAL PROGRAM

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- ☐ What do you have in place to generate and track referrals?
- ☐ How are you letting your customers know that you want and appreciate their referrals?
- ☐ Can you reward people for referrals? If so, put together a program and let everyone know  
(people are going to be more excited about earning extra \$\$\$ at a time like this)
- ☐ How can you incentivize your reps to make referral generation a priority?

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## OUTBOUND DIALERS

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- ☐ Could you use an outbound power dialer for your lead nurturing?
- ☐ How would a power dialer help your reps stay focused, make lots of calls each day, and reach more people?
- ☐ Do you have a data source to feed a power dialer short/long term?

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## PIPELINE MANAGEMENT

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- ☐ How can your reps manage their pipeline from home with your CRM?
- ☐ What reports do you have in place to hold your reps accountable to required metrics?

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## SCALABLE SALES SYSTEMS

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- ☐ What systems/processes can you put into place (that might have always been in the to-do list in your mind) that would create Standard Operating Procedures for your reps?
- ☐ What templates do your reps need?
- ☐ What would help your WFH reps, that normally you provide while physically in the office, or jump in to take care of for them?

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## SCRIPTS/TOOLS

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- ☐ Do all your reps have the scripts they need for success?
- ☐ Have you created for them the right, empathetic, but still selling-focused scripts to use?
- ☐ What other websites, information, links can you get the reps that would support their sales conversations at a time like this?  
(I don't mean Covid-19 articles, I mean articles that support how what you provide your customers is needed now, more than ever)

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## COMPLIANCE

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- ☐ What are you doing to ensure your reps are compliant?  
[Note: Compliance isn't always about government requirements, it is also about compliance to a sales process that results in a client who is the right fit and has been given proper expectations. During times like this, sales reps/teams want to just throw out all the rules to make sales. This will crush your business long term when all those clients become unhappy and want to cancel/complain]
- ☐ How are you monitoring the WFH reps' phone calls to ensure compliance?
- ☐ Can you put in Conversational Business Intelligence systems to automate compliance?

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## CROSS-SELL/UPSELL

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- ☐ What other products/services can your reps cross-sell/upsell during a time like this?  
(maybe something your company already offers, maybe something new you need to add to your catalog, or maybe a solution that another company sell – you can either create an affiliate relationship, or just send them the business – as a way to help your customers with more value)
- ☐ How can you incentivize your reps to cross-sell/upsell additional value to new customers?

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## LIFETIME VALUE

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- ☐ How can your reps ensure that new sales will support your previous Lifetime Value for clients?
- ☐ Do you know your Lifetime Value of clients?  
(You need to know that number, so you know your real #'s for weathering this storm)

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## TECHNOLOGY/CRM

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- ☐ What technology can you put into place for the reps with their calls? (power dialer, better VOIP, more automation)
- ☐ How can you automate more tasks within your CRM, especially repetitive tasks?
- ☐ What are the Minimum Success Tasks (MST) that your reps need to do with each prospect record in your CRM?  
(reps don't like updating their CRM, but it's critical at a time like for your management oversight)

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## LEADERSHIP

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- ☐ What type of leadership does your WFH sales team need right now?
- ☐ Can you do daily video conference calls to mimic the in-person team meetings you previously had?
- ☐ How often should you check in with each rep, each day – by phone, email, text, chat, video?
- ☐ What type of group chat platform can you put in place so that everyone can feed off each other's success, and support those that are stuck on deals?  
(like they would do if they were in the office sitting next to each other)

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## PERFORMANCE MANAGEMENT

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- ☐ What are you holding your reps accountable right now?
- ☐ Can you hold them to the same metrics of performance, or adjusted figures?
- ☐ How will you know if your reps are working, putting in the needed activity each day?
- ☐ What is the proper amount of activity, during these times, for your reps?  
(Most likely it is actually "more" activity needed)

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## SUPPORT SYSTEMS

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- ☐ What type of support do your reps need access to?  
(such as, chat/contact access to operations, marketing, customer service, retention, etc.)
- ☐ What support systems can you put in place to help your reps stay focused while working, and then turn it off at the “end of the day” and stay sane?

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## GAMIFICATION

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- ☐ What fun incentives and games can you put in place for your reps?  
(based on new deals, new activity levels, etc.)
- ☐ How can you share the gamification status/stats with the WFH team, which might have been easy to do in the past on a whiteboard or television in the office?

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## CORPORATE CULTURE

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- ☐ What can you do to keep everyone connected with the Mission, Vision, and Core Values of your organization, even when everyone is WFH?
- ☐ Are there swag or fun items you can send to all your reps/staff to help them feel connected?
- ☐ What daily reminders (email, chats, videos) can you or other executive team members send to the team to help them stay focused on your Mission and real value to customers?  
(the “Why we do what we do” and “Why are we here?” topics are critical right now)

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## CHANGE MANAGEMENT

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- ☐ Everything right now is about change; how can you help mitigate reps resisting change?
- ☐ How can you tie in your corporate culture to the WHY behind the changes needed?
- ☐ How can you set the right expectations for what you can see as the short term reality?
- ☐ How can you help reps see that this might last a while, but when it’s over, your company will be stronger out the other end?

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## TRAINING

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- ☐ What training can you provide on a daily or weekly basis to help your reps with new skills to focus on during this time?
- ☐ What continuous education training can you provide to remind reps of the fundamentals they should be practicing?
- ☐ How can you deliver that training?  
(short videos, quizzes, online modules, with a LMS or just via email, group chat, video conference call, recorded messages, etc.)
- ☐ Who will do the training sessions?  
(owner, manager, assign a different rep to a topic for each day)

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## RECRUITING/ONBOARDING

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- ☐ If you are still recruiting and growing, how can you set the proper expectations for your new rep's role now, and how it will be when/if things go back to "normal" with being in the office?
- ☐ How will you do your interviews remotely?
- ☐ What systems do you have in place to onboard remote reps?  
(such as getting their I-9's validated, securing all the necessary documents, getting electronic signatures)
- ☐ Who will handle the onboarding and how will it be done remotely?

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## COMPENSATION PLANS

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- ☐ Do you need to make any changes to the compensation plan?
- ☐ Are bonuses/commissions still achievable in the short term?
- ☐ If you have quota/minimums, should you enforce those during this time or lower the requirements?