

August 10, 2012

***To qualify for one free coaching session (up to 2 hours), please complete the checklist below to the best of your ability and email or mail back to Mike.***

## Sales Diagnostic Checklist

\*For questions 1-26, please write “Y” for Yes and “N” for No to the left of the question.

### Sales

1. Did you hit your sales goals last year?
2. Do you have a specific, written sales goal for this year?
3. Are you on target to hit your sales goals this year?
4. Do you have a clearly written sales plan, which you follow?
5. Do you have multiple lead generation strategies?
6. Have you defined your ideal client?
7. Do you know your average \$ sale?
8. Do you have an average \$ sales goal?
9. Do you know the lifetime value of a new client?
10. Do you have a monthly sales goal?
11. Do you have corresponding sales activity goals (# appointments, # of quotes, etc)?
12. Do you track sales and activity (goals and actuals)?
13. Do you know your conversion ratio (# leads to get a sale)?
14. Do you listen to and/or read personal/professional development materials?
15. Do you have a clear sales process which you follow?
16. Do you consistently prospect as much as you should?
17. Do you have a specific client loyalty plan which you follow?
18. Do you schedule time for sales prospecting and follow through?
19. Do you use PHNs (personally handwritten notes)?
20. Do you try to present/quote/close in person?
21. Do you ask for referrals or have a formal referral strategy?
22. Do you have a social media plan, which you follow?
23. Do you work more that you would like?
24. Are you mostly in control over your daily schedule?
25. Are you taking enough vacation/personal time?
26. Do you have a great attitude?
27. Do you believe you are coachable?
28. In what three areas do you the right coaching would provide the most value?
  - a. \_\_\_\_\_
  - b. \_\_\_\_\_
  - c. \_\_\_\_\_

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29. What has not been asked that you would like to address?

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Pre-Set Free Coaching Session Time and Location

Time: \_\_\_\_\_ Location: \_\_\_\_\_

Please scan and email to Mike Greene at [mike@integrityworkscoaching.com](mailto:mike@integrityworkscoaching.com) or mail to:

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