

This is a sample tool created by Aventi Group LLC, and is a subset of a much larger benchmark tool available to our clients as part of a project. No part of this tool may be distributed or shared without witten consent.

How to use this tool:

For each of the cells highlighted below you may enter a number from **0 to 4** based on the criteria shown in the **Scorecard Key**.
Aventi Group can offer you a perspective on each of these if you do not already have of perspective on industry norms.

Scorecard Key:

Best in class	4
Above peer group	3
On par with peer group	2
Below peer group	1
Significantly below peer group	0

CRITERIA	SCORE
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SALES ORGANIZATIONAL DESIGN

- Clarity of reporting structure (rep->dir->VP->CEO)
- Span of control for mgmt (< 10)
- Clear separation of territories/accounts
- Global footprint - NAM, LATM, EMEA, APJ
- Clear handling of multinationals
- Clear assignment of named accounts versus territory
- Quota/MBO metrics for reps and sales mgmt
- Demand gen/Digital Mktg role
- SDR - jr and sr
- AE -- jr and sr
- Specialists vs generalist/acct mgrs
- Channel rep
- Expansion/customer success rep post-sale or renewals

SALES PROCESS MATURITY

- Sales stages (demo->POC->trial->purchase-> expansion)
- Handoffs: Mktg (lead) to SDR(set/lead) to AE (oppty)
- Algorithm for lead assignment
- Land & expand strategy
- Customer retention/renewal focus
- If SaaS, CLV and retention %
- SDR - jr and sr
- AE -- jr and sr
- Specialists vs generalist/acct mgrs
- Channel rep
- Expansion/customer success rep post-sale or renewals

CHANNEL SALES TOOLS/ENABLEMENT

- Sales Methodology
- Quote tool
- Prospecting tools
- Customer presentation (custom vs std)
- Whiteboards
- Sales playbook/wiki
- Call scripts
- Cheat sheets
- Demo - recorded vs live
- Pricing guide
- Proposal/contract template
- How to sell value (e.g. upselling modules)
- Battlecard/Competitive selling
- Pre-implementation Check Sheet
- Product roadmap (feature queue)

CRITERIA	SCORE
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SALES TRAINING EFFECTIVENESS

- ILT - new hire vs specialized training
- Certifications
- Video guided instruction
- Onboarding plan
- Coaching with sales mgr (call eval, role play)
- Shadowing
- Mentor program

COMPLETENESS OF SALES KPI'S

- # calls/day (SDR)
- # calls/day (AE)
- # live demos/wk
- # trials/wk
- # price quotes/wk
- conversion %: SDR calls to set appts to AE handoff
- conversion %: demo-> quote -> trial -> activation -> purchase
- renewal rates

SALES TRAINING EFFECTIVENESS

- Software/subscription pricing guide
- Prof services/Implementation pricing
- Discounting policy, tracking and enforcement
- Deal desk and clear criteria/SLA?

QUOTING/DISCOUNTING DISCIPLINE

- ILT - new hire vs specialized training
- Certifications
- Video guided instruction
- Onboarding plan
- Coaching with sales mgr (call eval, role play)
- Shadowing
- Mentor program

SYSTEMS

- SFDC and mandatory field usage
- Partner Relationship Mgmtm (PRM) system
- Video guided instruction (e.g. Litmos)
- Marketing automation (e.g. ActOn, Marketo)
- Customer success/service (e.g. GainSight)
- Email tracking sw (e.g. Gmail/SFDC connector)
- Knowledgebase

SALES REPORTING

- QTD/YTD by product and geography
- Conversion rate by AE/SDR
- Pipeline growth
- Win/loss