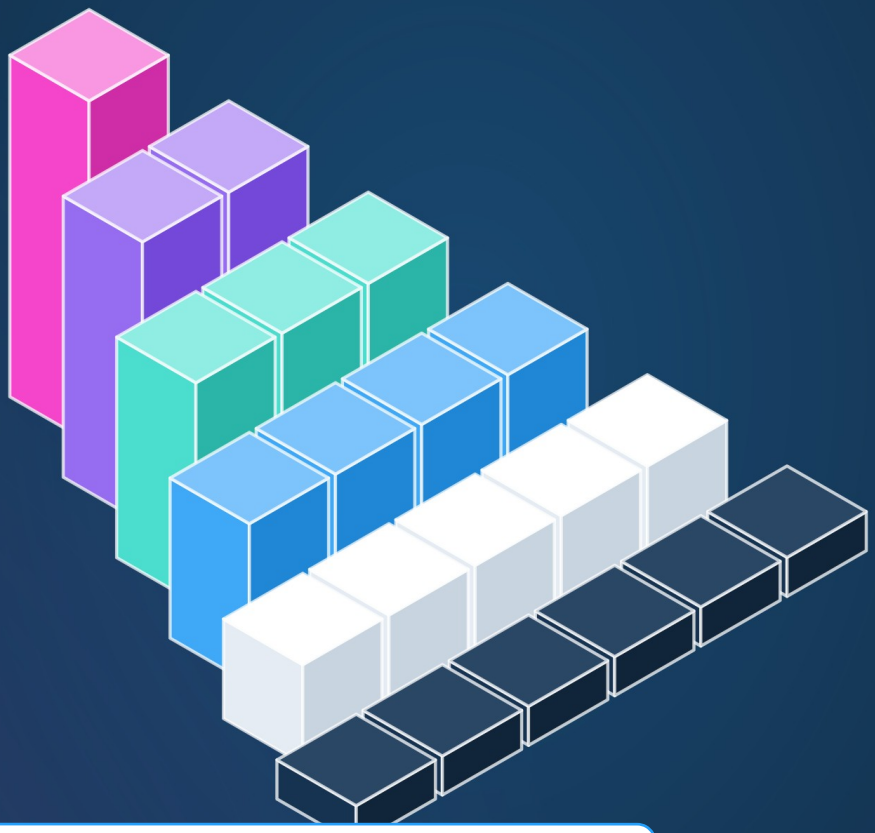
OPERATIONS INSIDER

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B2B SALES MANAGEMENT QUICK START CHECKLIST

Score your sales organization in one hour, with lists and figures you can point at.



CHOOSE. QUALIFY. QUOTE. STEER.

START HERE

How to Use This Check

One sales organization or one territory, one hour with the sales manager, a field salesperson and an inside sales person, twenty-five statements, one number.

01 LOOK	02 SCORE	03 ACT
Open the real records: the customer list with classes, the open opportunities, the quote register, the last forecast and the visit plan.	Score each statement from 0 to 4. Without a list, a rule or a figure you can point at, the score is 2 or lower.	Pick the weakest block and agree one action with an owner and a date before you leave.

The Scoring Scale

POINTS	MEANING
0	Not in place.
1	Happens occasionally, depends on individuals.
2	Partly in place, not consistent across territories or people.
3	Mostly in place and visible in the customer system.
4	Consistently in place, visible, reviewed and improved.

> **WHAT THIS CHECK IS**
>
> **A management check of how sales is organized and steered in a business with industrial customers. It does not rate individual salespeople. This material is management guidance. It is not legal advice. Competition and antitrust law, contract terms, export control and data protection are named as checkpoints only: clarify them with a qualified legal adviser and the rules that apply to your company and your markets.**

Before You Start

- **Scope:** one sales organization or one territory with its field sales, inside sales and the people who prepare quotes.
- **Evidence:** customer list, pipeline, quote register, discount approvals, forecast and actual order intake of the last four quarters.
- **Tone:** you check the system, not the people. Ask what makes the right way difficult, not who failed to enter data.

THE CHECK

01 Market, Customers and Coverage

NO.	CHECK	SCORE 0 TO 4
01	Customers and target customers are assigned to segments by industry and application, and the segments the company wants to grow in are named in writing.	
02	For every customer above a defined size the annual demand for the own product range is estimated in EUR, with the source of the estimate, and the estimate is not older than twelve months.	
03	Customers are classified by potential, not only by past revenue, and the class of each customer is visible in the customer system.	
04	Each class has a written coverage rule: who owns the customer, how often it is visited or called, and what inside sales and field sales each do.	
05	Visits and calls are planned against the rule every quarter, and the share of field time spent on customers with high potential is known.	

02 Sales Process and Pipeline

NO.	CHECK	SCORE 0 TO 4
06	The sales process is described in stages from the qualified inquiry to the order, and each stage has written criteria that must be met before an opportunity moves on.	
07	Every open opportunity is in the customer system with stage, value, expected order month, owner and a dated next step.	
08	The pipeline is reviewed with each salesperson at a fixed rhythm, and opportunities without a next step or beyond the age limit of their stage are closed or reactivated.	
09	Hit rates and average days are known per stage from the company's own history, and they are used to weight the forecast.	
10	The order intake forecast is compared with the actual figure every month or quarter, and the deviation is reported with its direction.	

THE CHECK

03 Inquiries, Quotes and Price

NO.	CHECK	SCORE 0 TO 4
11	Every inquiry above a defined effort is checked with fixed criteria before quoting starts, and the decision go or no-go is recorded with a reason.	
12	A declined inquiry gets a polite answer within a few days, and the customer hears what the company can offer instead.	
13	All quotes are in one register with value, hours spent, status, decision date and the reason for a loss, asked from the customer.	
14	Quotes above a defined value state the benefit for the customer in numbers of the customer's own operation, not only technical data and a price.	
15	Discounts follow written rules with approval limits, every discount is linked to something the customer gives in return, and the average discount is reported monthly.	

04 Key Customers and Cooperation

NO.	CHECK	SCORE 0 TO 4
16	For every key customer a written plan exists with the demand by product group, our share, targets for three years and the initiatives of the year.	
17	The plan contains a map of the people who influence the buying decision, with their role, their attitude toward us and who of us holds the contact.	
18	Key customer plans are reviewed with the management at least twice a year, and at least one joint initiative per key customer is running.	
19	Technical feasibility and the delivery date are confirmed by engineering and planning before a quote above a defined value is sent.	
20	Every order is handed over to order processing with a fixed checklist, and the share of orders that come back with open questions is measured.	

THE CHECK

05 Steering and System

NO.	CHECK	SCORE 0 TO 4
21	Sales targets exist per territory or person for order intake and for at least two leading figures, such as visits at customers with high potential or quote lead time.	
22	A small set of sales key figures is reported monthly with trend and target: order intake, hit rate, pipeline value, discount and forecast accuracy.	
23	A review meeting with a fixed agenda takes place at a fixed rhythm with every salesperson and ends with agreed next steps.	
24	Visit reports are short, entered in the customer system within two working days and contain the next step with a date.	
25	Data quality in the customer system is checked at a fixed rhythm, new salespeople are trained on process and system, and the process description has an owner.	

Your Result

BLOCK	POINTS	OUT OF
01 Market, Customers and Coverage		20
02 Sales Process and Pipeline		20
03 Inquiries, Quotes and Price		20
04 Key Customers and Cooperation		20
05 Steering and System		20
TOTAL		100

YOUR RESULT

Read the Number

The total tells you how much of your order intake depends on habit and on individuals. The weakest block tells you where to start.

TOTAL	WHAT IT MEANS	WHAT TO DO FIRST
0 to 39	Reactive. Ranking by revenue, a quote for every inquiry.	Estimate potential. List every open opportunity.
40 to 59	Organized. Lists exist, stages have no criteria.	Write criteria per stage. Clean the pipeline.
60 to 79	Managed. Coverage by potential, hit rates known.	Benefit in numbers. Plan the key customers.
80 to 100	Steered. Figures lead, key customers grow by plan.	Hold the level. Keep the data clean.

Your Three Priorities

NO.	WHAT TO IMPROVE	FIRST ACTION	OWNER	DUE

THE RULE FOR EVERY ACTION

Owner and date, or it did not happen. Repeat the check after six months and compare the blocks.

What to Do Next

NEXT STEP	WHAT YOU GET
STARTER KIT	The guide for the first 30 days in one territory and the customer and pipeline workbook in Excel.
EXCELLENCE BUNDLE	Playbook, two-day workshop pack, eight templates, the Excel system with 14 sheets and a workshop deck.

Both are available at operationsinsider.com.