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# Check list

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## Sales Management Audit

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**Strategic Concepts (I) Pvt. Ltd.**

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## ***Preface***

Sales Management Audit is an effort to probe the Sales Management function presently in vogue in an enterprise vis-à-vis its efficiency and effectiveness towards achieving organizational goals and overall alignment to the mission and vision of the organization.

The quotient of customer centricity, the metrics of customer satisfaction index, the dyad of skill – will matrix of sales team and the motivation charter of the sales team are some of the key deliverables that we look at while conducting the said audit.

Just like the medicine of doctor works very well only if the patient agrees or realizes that there is a problem, similarly such audits and subsequent actions get best results when the client has an inkling or understanding of the key problem areas or is very clear about the milestone that they are trying to achieve through this joint collaboration with us.

Sd/

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**Chief Knowledge Resource**

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### ***Brief about the client***

*Business Name*

*Promoter*

*Contact person*

*Contact details*

*Nature of business*

*Scope of business*

*Span of sales team*

*Customer centricity*

*Opinion of the promoter*

## **The Product**

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## **The Price**

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## **The Place**

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## **The Packaging**

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## **The Promotion**

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## **The Positioning**

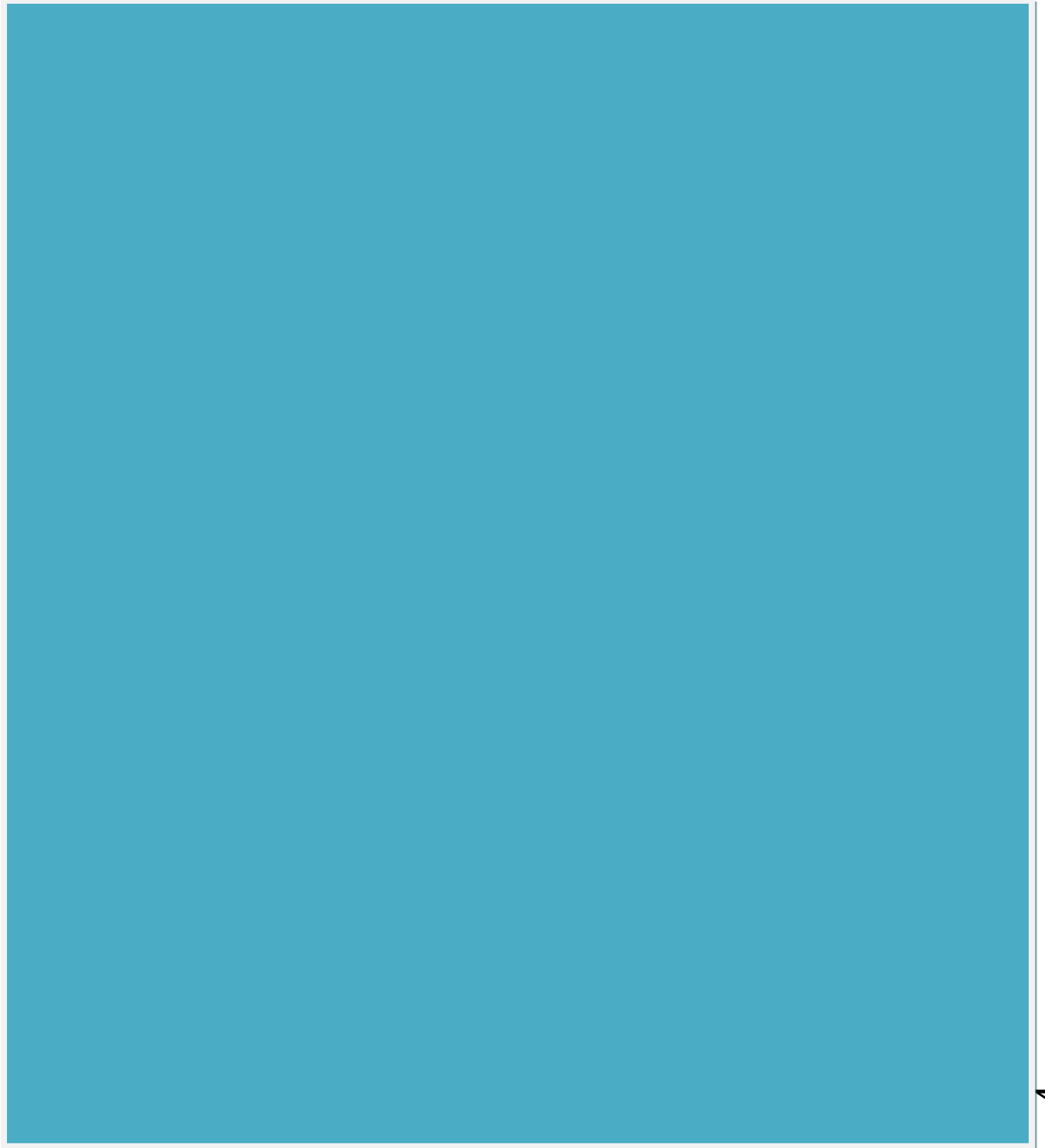
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## The Sales Team Organization Chart



## **Appointment of a new Channel Partner**

1. Assessment Criteria
2. Policy
3. Investment
4. Payout
5. Documentation
6. Business Model
7. Growth Matrix
8. Learning and Development of channel partner
9. Induction
10. Handholding
11. Promise Sheet
12. Expectation Matrix

## **Management of an existing Channel Partner**

1. Supply Chain Management Logistics
2. Demand – Supply curve and its elasticity
3. Demand Forecasting
4. Primary Sales
5. Secondary Sale
6. Tertiary Sale
7. Credit policy
8. Marketing Communications support – ATL , BTL

9. Goods return policy
10. POP display
11. Visual Merchandising support
12. Competition Mapping
13. Market Share analysis
14. Market Penetration mapping
15. Analysis of route maps, beat maps and journey cycles
16. Time Management on a Journey Cycle (MNOC, MTBC)
17. Shelf space analysis
18. TAT (Turn Around Time) Analysis
19. Promise Quotient (PQ) Levels
20. Issues in the channel
21. Customer Centricity Response of brand
22. Complaint Handling System
23. Suggestion acceptance ( Bottom up communication)
24. Top down communication channel
25. Market metrics assimilation to fight competition
26. Gap Analysis in the market
27. Channel Satisfaction Index
28. Brand acceptance index
29. Brand polarity
30. Cluster Analysis and market spread

## **Empowering the Channel Partner**

1. Training
2. Mentoring
3. Coaching
4. Hands on learning
5. Market Metrics with analysis
6. Business planning to improve tertiary sale
7. POP Display
8. BTL activation at the channel partners level
9. Marketing budget support
10. Management of bad debts
11. FSN (Fast, Slow , Non moving) Analysis of channels stock
12. Co create value with channel partner
13. Policy on handling competing brands
14. Develop in-shop promoters for the brand in the channels location

## **The Sales Management Function**

1. Sales Management Policy / handbook
2. Job description and entitlements
3. Roles & Responsibilities
4. Targets and Deadlines
5. Journey Cycle

6. Daily reporting/ meeting systems
7. Management Information Systems
8. Incentives
9. Rewards and Recognitions
10. Recruitment, Retention and Results (3R)
11. Learning and Development of Sales Team
12. The Sales Kit
13. Sales Documentation
14. Government compliance
15. Infrastructure preparedness for sales
16. IT and ITES support
17. Back office support
18. Internal promise sheet (TAT)
19. Quality benchmarks documentation
20. Quality Assurance
21. Marketing Support from brand to push sales
22. Top down communication in sales team
23. Bottom up communication in sales team
24. Order booking – supply response time
25. MNOC tracking
26. MTBC tracking
27. ATS tracking
28. Time Management of a Journey cycle for a sales person
29. New Business Development Quotient





30. Performance appraisal system for sales team
31. Employee Attrition and Retention models
32. Third party vendor management policy e.g. transporter etc
33. Market feedback collation and assimilation system
34. Footfall analysis at tertiary sale points
35. Humane configuration of sales team

