



## Prospecting Effectiveness Audit

17 Questions to Determine Your Team's Ability to Find New Business

**Complete the following audit and total your number of "Yes" responses**

Our salespeople spend time doing disciplined research on their prospect before every single appointment.

Yes | No | Don't Know | N/A

When possible, our salespeople work to gain an understanding of the formal and informal decision-making process inside the prospect's organization before making sales calls.

Yes | No | Don't Know | N/A

Our salespeople invest time in and place value on improving their position in the marketplace through speaking, sharing research, and improving their overall business acumen.

Yes | No | Don't Know | N/A

Our salespeople actively use LinkedIn to research and target their ideal prospects.

Yes | No | Don't Know | N/A

Our salespeople place importance on continuous prospecting.

Yes | No | Don't Know | N/A



Our salespeople independently seek new and innovative ways of reaching target prospects.

Yes | No | Don't Know N/A

Our salespeople interact with marketing to develop ways for them to work together to develop new business.

Yes | No | Don't Know N/A

Our salespeople consistently mine for new business inside their key accounts.

Yes | No | Don't Know N/A

Our salespeople work to have a well-diversified mix of both large and small prospects (instead of large accounts only).

Yes | No | Don't Know N/A

Our salespeople engage in meaningful outbound prospecting activities (proactive) vs waiting for inbound phone calls (reactive).

Yes | No | Don't Know N/A

As a general rule, our salespeople think and act strategically as it relates to effective prospecting inside their territory or assigned account base.

Yes | No | Don't Know N/A

Our salespeople employ effective, articulate, and respectful communication when setting appointments.

Yes | No | Don't Know N/A



Our salespeople rely on a well-diversified mix of prospecting methods to lower the risk of relying on one method only. Yes | No | Don't Know N/A

Our salespeople spend sufficient time staying on top of industry trends so as to be seen as experts by prospective buyers. Yes | No | Don't Know N/A

Our salespeople know exactly the characteristics of a qualified prospect. Yes | No | Don't Know N/A

Our salespeople spend time only with qualified prospects. Yes | No | Don't Know N/A

Our salespeople actively seek referrals and warm introductions into new accounts. Yes | No | Don't Know N/A

- If you are able to confidently answer “yes” to 12 or more of the preceding questions, your team is well-equipped at finding new business. Congratulations! There is always room for improvement, so focus your attention on any areas that didn't receive a strong “yes” response.
- If you find that you can only answer “yes” to 6-11 of the preceding questions, your team lacks some of the skills or initiative that are necessary for successful prospecting. Determine gap areas and set specific goals to improve their performance.
- If you are unable to answer “yes” to at least 6 of the preceding questions, your team is missing out on valuable business opportunities. Having a pool of qualified prospects is critical to the health of your sales organization, so improving prospecting skills should be at the top of your list of priorities.