

BLL

BUSINESS
LEADERSHIP
LEAGUE
NAVI MUMBAI

THE DAILY

SALES



CHECKLIST

For Small Businesses





How do you ensure that you get the most out of every single workday?

How do you make every single minute of your day productive and focused on growth for your company?

What kind of sales checklist do you have in place?

Here is a Fantastic Solid Daily Sales Checklist


To help you keep an eye on what's Important in your Business .



Pilots, regardless of their experience level, complete a pre-flight checklist every time they get on a plane. The pre-flight checklist helps to ensure that no critical step is overlooked or forgotten.


In the same way, a sales process checklist can help you to track each stage of the sales cycle and is the first step to creating a sales process plan.

We will cover following points in this checklist:

1. CHECK IN ON OVERALL TEAM GOALS
 2. REVIEW SALES REPS' NUMBERS
 3. TACKLE A LIST OF URGENT CUSTOMER NEEDS
 4. REVIEW PENDING HIGH-PROFILE DEALS
 5. CHECK IN ON STRUGGLING SALES REPS
 6. STREAMLINE YOUR REPS' DAYS AND SCHEDULES
 7. CHECK IN WITH THE MARKETING TEAM
 8. REVIEW CURRENT PRICING STRATEGIES
 9. MONITOR THE MARKET
 10. BRUSH UP ON YOUR SALES SKILLS
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1.CHECK IN ON OVERALL TEAM GOALS


You can't make significant progress on your goals if you aren't mindful of these things. hence it is necessary to follow or write down some points or goals we need to achieve.

- Keep a running log of your sales team's goal and their benchmarked progress
 - Review these goals, update your progress,
 - keep meticulous notes on what works, what doesn't.
 - keep a report of your company's current progress toward its quarterly margin goals as well.
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2. REVIEW SALES REPS' NUMBER

Final sales numbers are often the most attention-getting stats for sales managers, but there are a lot of other elements that go into creating those final numbers.

Here are 5 ways you can evaluate sales reps more fairly and effectively and look at the whole picture of what they bring to your team:

- Measure process, not just final results
(It might sound counter intuitive in such a results-driven business, but more sales teams need to focus on the overall sales process, and not just the final results.)
 - Promote good prospectors
(Most salespeople hate prospecting. They hate making cold calls, and they hate making those first uncertain steps on the road toward finally closing a sale.)
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Reward training

(Instead of evaluating your top sales reps based only on their sales numbers. try to capitalize further on their success by asking them to create best practices and training opportunities.)

Recognize teamwork

(Look for ways to reward sales reps that exhibit and promote good teamwork. whether that means filling in for someone on a client meeting, or helping a teammate close a big deal.)

Check for the next deal




(Making a sale is huge, but what about when it comes time to renew or upgrade? And are your customers likely to refer you to someone else?)




3. TACKLE A LIST OF URGENT CUSTOMER NEEDS

Start with urgent customer needs. This includes approaching highly-profitable customers at risk of leaving and placating them with added value propositions or discounts.

- keep customer relationships in the forefront of your mind at all times.
 - short friendly email or phone call can work for reminding customers of the value you provide and the fact that you care.
 - Make a quick list of these accounts and regularly cycle through the list by contacting one of them every morning.
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4. REVIEW PENDING HIGH-PROFILE DEALS

Some deals take days to close, other months. It really depends on the industry and market. However, high-profile deals, much like high-profile customers, should be getting extra attention. Check in with your sales reps on the status of major deals.

- Circle back to lower-priority deals ones you cracked high priority deals .Take care of them early in the day so that you don't get in the way of your team's success.
 - Check whether any contracts with questionable discounts are pending.
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5. CHECK IN ON STRUGGLING SALES REPS

Your next task on your sales checklist is to develop and implement methods to better motivate and support these reps. Mentor and guide them through difficult deal negotiations. Make sure they have the materials they need to succeed.

- Document how you help your sales reps to build a growing guide other sales reps can reference.
 - Transform unique sales situations into opportunities to create a template of how to approach a similar problem.
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6. STREAMLINE YOUR REPS' DAYS AND SCHEDULES

Help your team streamline their tasks and increase efficiency. If they have more time, they have more time to sell. Help them avoid being bogged down by administrative or reporting tasks.

- Research a prospect. This part of the sales process, while extremely important.
 - Brainstorming one or two new ways to automate more processes for your sales team and removing roadblocks.
 - Take meetings on time
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7. CHECK IN WITH THE MARKETING TEAM

Collaborate with the marketing team by reviewing your list of recent high-profile leads and help them understand what they all have in common. Help them drive more success for the company by sharing the strategies your sales team finds most successful and then fine-tuning buyer personas.

- check in with other departments' management heads to drive strategy for the company as a whole.
 - Review new campaigns' progress and make sure your goals for it are aligned with how your reps are selling on it.
 - Request new customer education materials based on questions your sales reps are asking you.
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8. REVIEW CURRENT PRICING STRATEGIES

Pricing plays a huge part in profits, and your sales team plays a huge part in making sure pricing strategies are working.

- Review what's working and what's not on a daily basis to ensure as many deals as possible remain profitable.
 - Highlight recent discounts that backfired or others that drove profitable high-volume orders.
 - Determine if your pricing team is monetizing value properly.
 - Get their feedback on if your sales reps are selling on these value propositions well or if they're confusing customers.
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9. MONITOR THE MARKET

As you near the end of the day, it's time to take some solo time to consider external changes and their implications. Are you noticing changing customer needs in a specific market? It's time to do a little research.

- Do your target industries need your products specifically.
 - check what are your competitors doing.
 - Check if your competitors Are launching new products or implementing new prices?
 - Identify which methods are they trying new with their sales force.
 - Be in-the-know early to avoid being blindsided later.
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10. BRUSH UP ON YOUR SALES SKILLS

Now that you've nearly reached the end of your day, it's time to focus more on yourself and your career development.

- Catch up on the top sales management and strategy blogs to build your knowledge.
 - spark creative ideas to pass onto your teams.
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That's it!

By completing these actions, you'll be well on your way to creating a high-quality client list with a solid marketing strategy, a professional-looking brand, a website that works and a communications plan to increase your visibility.

For more downloads and marketing resources

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About BLL

[BLL \(Business Leadership League\)](#) is a community of aspiring businesses. The businesses which want to grow, scale-up and create value for all stakeholders. If you are looking for growth, this is the right platform and network for you.

In the new order, the way of doing business has gone through a drastic shift....so how do you cope up. You need to be a part of business ecosystems to unleash the power of collaboration.

Your network is your net worth, so Join the BLL community today for opportunities to Network and generate leads

To get access to relevant business tips

To access business meets

To get access to business services

To grow together and contribute to each other

Let's share our stories.

Let's join hands and reinvent ourselves to stay relevant.





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