

Hitting The Numbers: Checklist

No Sales Leader wants to be in a situation where heroics are needed to pull out an epic close for the quarter. To avoid sweating the numbers, you need to understand the real numbers—not just at the end of the quarter, but on an ongoing basis. The only way to do that is to assess which opportunities satisfy your organization’s definition of what’s solid and what’s not. Then you need a plan to fill in the gaps. Here are a few questions to get you started. Supplement this Checklist with a robust selling process to maximize effectiveness.

Add One point for each YES and Zero points for each NO		YES	NO
Separate the Real Opportunities from the Fluff in the Pipeline:			
Meet with each rep and review each opportunity by asking:			
1.	Has the buyer confirmed the critical business issue keeping them up at night?		
2.	Has the buyer expressed a sense of urgency to solve this problem?		
3.	Has the buyer articulated the factors causing this issue? (at least 2 or 3)		
4.	Does the buyer understand the impact that your solution can have on their business outcomes?		
5.	Are you dealing with someone with the authority to get the deal done?		
6.	Have all the members of the buying committee been called on?		
7.	Have expectations and an Action Plan been agreed to by the client?		
8.	Does this opportunity truly meet the criteria defined for this milestone?		
Reset your Forecast and Pipeline			
9.	Have you pushed Fluff opportunities out of the pipeline or at least to another quarter?		
10.	Have you reset your forecast with the newly scrubbed data based on your questioning?		
11.	Have you calculated the delta between what is real and what you still need to achieve your		
Identify opportunities to fill in the void:			
12.	Have you found opportunities where you can add more value, cross-sell, up-sell, expand the		
13.	Have you accelerated any of the opportunities slated for future months?		
Get the Real Deals Across the Finish Line			
Have you:			
14.	Fostered C-level relationships between both companies?		
15.	Triaged issues and develop account-based SWAT teams for creative problem-solving?		
16.	Sped up any problematic legal issues or T’s and C’s?		
TOTAL			

Results: 1 – 7 Time to Jump-Start Sales
 8 – 13 Take it to the next level
 14 - 16 Great job!

GrowthTera helps leaders align teams and unite the company to maximize revenue growth and impact. We help transform your sales, marketing and customer success functions into an efficient, Integrated Revenue Engine™. We build great companies where employees thrive and customers are loyal advocates.



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