



**Tri-P Analysis Questionnaire-** This questionnaire will provide sales leadership with a current state analysis of overall sales team dynamics based on People, Process, and Performance. Upon completion, a cold closers performance expert will provide a detailed project plan including these components:

- Recommendation
- Design
- Implementation
- Execution
- Results
- Measurement
- Systemization

### People

1. How many people are in the sales team and what is the tenure, education, selling skill and professional background of each member?
2. Who are the best/worst sales persons in the sales team and why?
3. Who sells the most in the sales team based upon: revenue, profitability, new clientele and client retention?
4. How would you classify each person in the sales team and why? Hunter? Farmer? Blend? Other?
5. Who manages, trains, supports, and provides sales development for the sales team?
6. What is the sales career pathway and what determines advancement?
7. Explain the ideal structure of the sales team based upon current and next year goals.

### Process

1. How does the sales team track and manage sales leads, prospects, opportunities, deals and clients?
2. How many leads does the sales team derive from passive marketing tactics? (Social Media, Email, Direct Mail, Seminars, Webinars, Tradeshows, Conferences, Networking, Referrals, Word of Mouth, Sponsorship, SEO/ SEM, Advertising)
3. What is the total number of raw leads available to the sales team?
4. How many cold calls/ warm calls/ referral calls does the sales team complete each day/ week/ month?
5. What lead rating and scoring system does the sales team use?
6. How does the sales team forecast sales revenue and profitability improvement?
7. Explain the ideal process for sales development based upon current and next year goals.

### Performance

1. How many clients does the company currently have and what are current sales revenue and profit margin numbers for the company?
2. What does the "sweet spot" client for the company look like and what criteria were used to determine?
3. What are the highest profit margin product/ services the company sells?
4. What is the overall sales win/ loss percentage? Raw leads to closed deals ratio? Client lifecycle? Sales cycle timeframe?
5. What is the client retention strategy of the company?
6. Is the company on pace to hit revenue and profit margin targets for this year? Next year?
7. Explain the ideal performance objectives for new clients, sales revenue, profitability, and client retention based upon current and next year goals.

Complete and return questionnaire to appropriate **cold closers, llc** consultant.