

Sales Process Evaluation Worksheet



Having a tight, replicable, and purposeful sales funnel in place is critical to the success of your business.

Gone are the days of clients walking in off the street and booking intro sessions. Consumers can get what they want when they want it, which makes them more fickle than ever and means you need to stay in front of them, nurture them, and be top of mind when they decide to take action.

This worksheet was designed to help you analyze and evaluate your current sales process to find room for improvement. Come back to this worksheet once per quarter to continually refine and adjust your sales process to meet your clients and your business goals where they are today.

To get started, click File > Make a copy. (Make sure you're logged in to a Google account.) You can also download it to Word, or just print it out if you prefer.

As [Simon Sinek](#) has taught us, "People don't buy what you do, they buy why you do it." Therefore, refining your sales process should begin with a deep connection to your Mission Statement to ensure that it is baked into and front of mind throughout the entire process. **What is your Mission Statement and Core Values?**

Sales are most effective when you (*and your team*) utilize your authentic voice. Choose three adjectives from below that most accurately describe your brand tone:

- ☐ Unassuming
- ☐ Curious
- ☐ Surprised
- ☐ Formal
- ☐ Forceful
- ☐ Concerned
- ☐ Informal
- ☐ Encouraging
- ☐ Optimistic
- ☐ Excited
- ☐ Supportive
- ☐ Knowledgeable
- ☐ Non-judgemental

****Pro-tip** - run your sales scripts through [Grammarly](#) to ensure that you are staying true to your brand tones.

Every move you make within your business should always be strategically working towards your **SMART goals**. *SMART goals are Specific, Measurable, Actionable, Relevant, Time-based goals.* Sales is no different! One critical mistake in sales is not setting clear sales goals. **What are your SMART goals for this year? Be specific if you have goals for each quarter.**

Based on your **SMART goals** above, what goal conversion rate (new client to ongoing client), would help get you there?

What about a goal for the number of new members/ongoing clients you would like per month?

What is your monthly revenue goal?

Before refining your sales process, let's understand where it stands. Write your current sales process for yourself below. Remember—the most successful sales processes are simple, replicable, and mission driven.

	Trigger	Audience	Timing	Contact Method	Assigned To	Messaging	CTA
Step 1							
Step 2							
Step 3							
Step 4							
Step 5							
Step 6							
Step 7							
Step 8							
Step 9							
Step 10							

Looking at your sales process on paper, let's rate different aspects of it:

On a Scale of 1-10, how simple is your sales process? 1 being complicated and 10 being simple.	
Is your sales process replicable? Yes/Sort Of/No	
Does your sales process support your mission statement <i>and</i> convey your mission statement to the prospect?	
Are you capturing leads/prospects?	
Do you have a process that effectively nurtures prospects to book their first session? Yes/No	
Do you have a nurture process in place that corresponds to your intro pack? Yes/No/Not Really	
Do you have a process for converting new clients into ongoing clients? Yes/No/Only Organically	
Are you utilizing your team to the fullest extent?	
Are you asking your prospects questions that will support your sales efforts down the line?	
Are you creating memorable experiences for your prospects throughout the sales process?	

Another key question for you to revisit when you're evaluating your sales process is defining **your preferred client**. Answer these questions about your client avatar to ensure you're creating a sales process that will speak to them.

Client Demographic (age, gender, occupation, etc)	Channels Most Used By Clients (social, email, text, etc)	What Drives My Clients (deals, challenges, FOMO)	What My Clients Love MOST About My Studio	What Are The Common Objections We Receive for Prospects

Let's look at some current data so that we can analyze if your upcoming revisions and improvements to your sales process are effective.

Last month, how many leads/prospects reached out to your studio to inquire about your services?

How many of those leads booked a first class or intro package?

What was your new client to ongoing client conversion rate last month?

How many active clients do you have?

What is your average client lifespan?

Based on all of the information that you gathered above, what are three areas for improvement in your sales process that you have identified?

Issue identified	How we will improve upon it	Team member that will implement