Sales Partners & Referral Network

- Who consistently sends us referrals — and how do we recognise or incentivise them?
- What strategic partners open doors to accounts we couldn't reach alone?
- Do we use brokers, resellers, or referral partners?
- What co-selling or alliance partnerships exist or should exist?
- What percentage of new business comes from referrals vs. outbound vs. inbound?

Sales Activities & Outreach Cadence

- What does a typical sales rep's week look like — what activities and in what volume?
- What is our outreach sequence? (Calls, emails, LinkedIn touches, follow-ups — and in what order?)
- How many touches on average does it take to book a discovery meeting?
- What activities move deals through the pipeline fastest?
- What activities should be eliminated or automated?

Sales Value Proposition & Pitch

- What is the single core sales pitch — the one sentence that makes a prospect say 'tell me more'?
- What specific outcomes and results do we promise to deliver?
- How do we frame value vs. cost so the price feels obvious?
- What proof points, case studies, or data do we use to build credibility?
- How do we tailor the pitch for different buyer types, industries, or deal sizes?
- What does our discovery process look like before we pitch?

Buyer Relationship & Trust Building

- How do we build trust with prospects before they are ready to buy?
- What touchpoints warm a cold lead into a warm one?
- What does a healthy sales relationship look like at each pipeline stage?
- How do we stay top-of-mind for prospects who are not ready yet?
- How do we maintain relationships post-sale for renewals, upsells, and referrals?

ICP & Target Account Profile

- Who is our Ideal Customer Profile (ICP)? (Industry, company size, annual revenue, geography, decision-maker title)
- What characteristics make a company a perfect fit?
- What triggers a company to become 'sales ready'?
- What clearly disqualifies a prospect — who should we never waste time on?
- Choose 2–3 Target Account Segments to prioritise.

Sales Cost Structure

- What is our blended Customer Acquisition Cost (CAC) from sales activities?
- What does our sales team cost per seat? (Salaries, commissions, tools, training)
- What is the cost of our sales cycle per opportunity worked?
- What are our biggest sales expenses? (Events, outbound tools, demos, travel)
- Where can we reduce cost-per-close without shrinking pipeline quality?

Sales Tools & CRM Stack

- What CRM do we use — and how is our pipeline structured inside it?
- What sales automation and sequencing tools do we rely on? (e.g. Apollo, HubSpot, Outreach)
- What data enrichment and prospecting tools help us find and qualify leads?
- What call recording or coaching tools are in place? (e.g. Gong, Chorus)
- What tools are missing or creating friction in the sales process?

Objection Handling & Competitive Edge

- What are the top 5 objections we hear most — and exactly how do we respond to each?
- How do we position against our top 3 competitors without badmouthing them?
- What is our win rate — and what are the top reasons we lose deals?
- What proof, demo, pilot offer, or risk-reversal reduces buyer hesitation most?
- What is our 'why us, why now' answer — the compelling reason to choose us today?

Sales Channels & Prospecting Mix

- How do we source new sales opportunities? (Cold outbound, warm inbound, referrals, events, LinkedIn, partnerships)
- Which channels produce the highest-quality leads that close fastest?
- What is the right mix between outbound prospecting and inbound follow-up?
- What new channels should we test to increase pipeline volume?
- How do we coordinate marketing-sourced leads with sales outreach?

Qualification Framework & Pipeline Stages

- What framework do we use to qualify leads? (BANT, MEDDIC, CHAMP, or our own)
- What are the defined stages of our sales pipeline — from first touch to closed won?
- What specific action or milestone moves a deal from one stage to the next?
- What is our average pipeline velocity — how long does a deal take to close?
- What is our pipeline coverage ratio? (Pipeline value vs. revenue quota — typically 3–5x)

Revenue Targets & Sales KPIs

- What is our monthly, quarterly, and annual revenue target — broken down by rep, channel, or segment?
- What is our average deal size — and how are we working to grow it?
- What is our lead-to-close conversion rate at each pipeline stage?
- How many SQLs (Sales Qualified Leads) do we need per month to hit quota?
- What are the 5–7 weekly sales metrics every rep and manager tracks? (Calls, meetings booked, proposals sent, deals closed, pipeline added)
- How do we forecast revenue — and how accurate is our forecasting model?
- What is our Sales Efficiency Ratio — revenue closed per dollar invested in sales?

Closing Strategy, Offer & Pricing Structure

- What does our offer look like at the point of close? (Tiers, packages, one-time vs. recurring)
- What creates urgency or incentive to sign now vs. 'thinking about it'?
- How are contracts structured? (Length, payment terms, renewal terms, guarantees)
- What is our discount policy — who can approve what, and under what conditions?
- How do we re-engage stalled or ghosted deals?
- What does our onboarding or next-step process look like immediately after a deal closes?

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