

# SALES CULTURE EVALUATOR

ITEM	DESCRIPTION
<b>Decided to be Sales Organization</b>	Clear Decision to do what it takes to be a sales organization. Without this clarity, it is tough to accomplish.
<b>Leaders lead by example</b>	Leaders make and are active in the sales process
<b>Ideal Client Profiles</b>	Targets are known and assigned with accountability
<b>New Business is Loudly Celebrated</b>	New business is celebrated throughout the organization
<b>Rules can be Broken</b>	Process in place to break rules when it makes sense. These rules are things like marketing department standards to get started and other reasonable items on a one off basis.
<b>HPT's maximize sales time</b>	Separation of sales and service
<b>BDC</b>	A department or person who focuses on mktg and new business.
<b>Account transfer is Mandatory</b>	System in place to transfer accounts from Producers
<b>Systematic Sales System</b>	Differentiated sales system being executed consistently
<b>Relentless Preparation</b>	Sales people do all necessary preparation on every case
<b>High Confidence of Sales Staff</b>	Organization focuses on keeping confidence high with sales team
<b>Purposeful Relationship Management</b>	Sales people all have plans for cultivating relationships
<b>MAS/TAS</b>	Minimum and target account size is individualized and moving for each Producer
<b>Practice</b>	Individual and Group practice are the norm of the organization
<b>Accountability Welcomed</b>	Sales people like the accountability because it helps them succeed
<b>Know vs Guess</b>	All sales people and managers know versus guess on critical indicators (Conversion, closing, avg client size, #of calls).
<b>Strategic Positioning</b>	All cases have discussions to maximize the positioning of the sale
<b>Intellectual Curiosity</b>	Business Acumen is trained and a priority for all sales people
<b>Clients and Prospects knowledge</b>	Niche development and deep study into clients to understand them holistically.
<b>2% Investment in Talent</b>	2% per year of investment in non-validated producers
<b>Winners Culture</b>	Culture where everyone feels part of the success
<b>Proactive Pipeline Management</b>	Monetized pipeline, movement measured, owned by agency
<b>Full Time Clients</b>	Sell holistically or proactive cross sell is a norm

