

# Sales Excellence Assessment Timeline

PLAN.GROW.DO.

The B2B Sales Agency



## Step

## Step Description

### Outline Scope meeting

Can be conducted by email exchange if the client agrees

In this meeting, we will discuss the timeline, scope and expectations of the team who will be contributing to the assessment. We will answer any questions and be sure to underline expected outcomes of the assessment.

Week  
1

### Client message to team outlining the rationale

PGD to provide email template for personalisation

This important framing will encourage buy in from the sales team and leadership who need to champion the input into the process.

Week  
1

### Distribute the Sales Feedback Form

PGD require email addresses of each participant

The first of the two interventions required from the salesforce, this qualitative piece will offer fantastic insights relevant to your business, offering voices and perspectives you may not otherwise hear.

Week  
1>2

### Distribute the five sales assessments

PGD require email addresses of each participant

This comprehensive piece is designed to explore the behaviours and tools that are evident – or not – across the organisation. The five assessments explore the five pillars of the Sales Assessment Framework and will offer a unique benchmark for your organisation.

Week  
3>5

### Online validation interview/s with relevant team or an online group workshop

Conducted on Zoom/Team/Google

It's important to identify key themes from the initial data set and use the validation session to build a clear picture around those themes. This stage offers an excellent place for better understanding and engagement between Plan Grow Do and the organisation.

Week  
5>7

### Assessment analysis and report writing by Plan.Grow.Do.

From the initial sales feedback form, the completion of the sales assessment questionnaires and the validation process, we will refer to the various data sets and observations to analyse key trends and themes to create a clear benchmark for the organisation.

Week  
8>10

### Share the Sales Excellence Assessment report and close out discussion with the client.

Follow up steps as appropriate

Once analysed, the data will be presented in a way that offers key insights wholly relevant to your business. This presentation will share findings specifically from your own organisations' responses against the Sales Excellence Framework and be enhanced with wider B2B data to create a specific roadmap of short, medium and longer term opportunities, along with areas of strength to develop.

Week  
11>12