



2021 Sales Leader's Check List

- ▶ Create a formal interview process
 - ▶ A compelling job description that lays out the accountabilities
 - ▶ Phone screen check list
 - ▶ Behavioral-based interview with questions by competency
 - ▶ An assessment that will tell you more than you know now
 - ▶ A 2nd interview based on the results of the assessment
 - ▶ Verbal offer
 - ▶ Written offer
 - ▶ Create 2-week formal onboarding plan presented to them BEFORE they start – by job role (SDR, AE, CSM, SE)

- ▶ Set quota by rep by month/quarter and review the expectations about getting to quota

- ▶ Sit down with each of your reps to review their 2020 sales math
 - ▶ Ave. Sales
 - ▶ Close rate
 - ▶ Ave.
 - ▶ Areas they are excelling – verticals, geography, personas, size

- ▶ Require your reps to create a 2021 Personal Business Plan

- ▶ Determine how you'll support professional development of your reps
 - ▶ Will each rep have a professional development budget?
 - ▶ Will you send them to 3rd party training?
 - ▶ Will you bring a sales trainer inhouse?

- ▶ Review what the reps can expect from the sales leader and the company

- ▶ If you don't have an accountability culture, determine how you'll accomplish this by 2022 – Let me know if I can help!

