

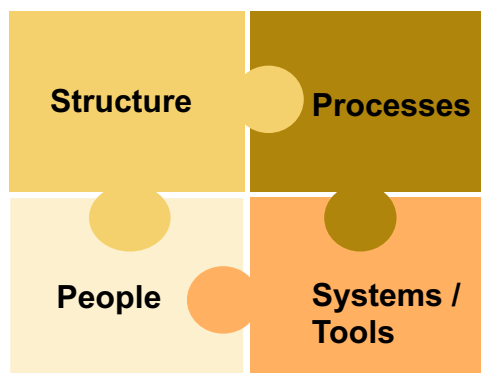
# Sales audits: quick overview

Barcelona

-2012-

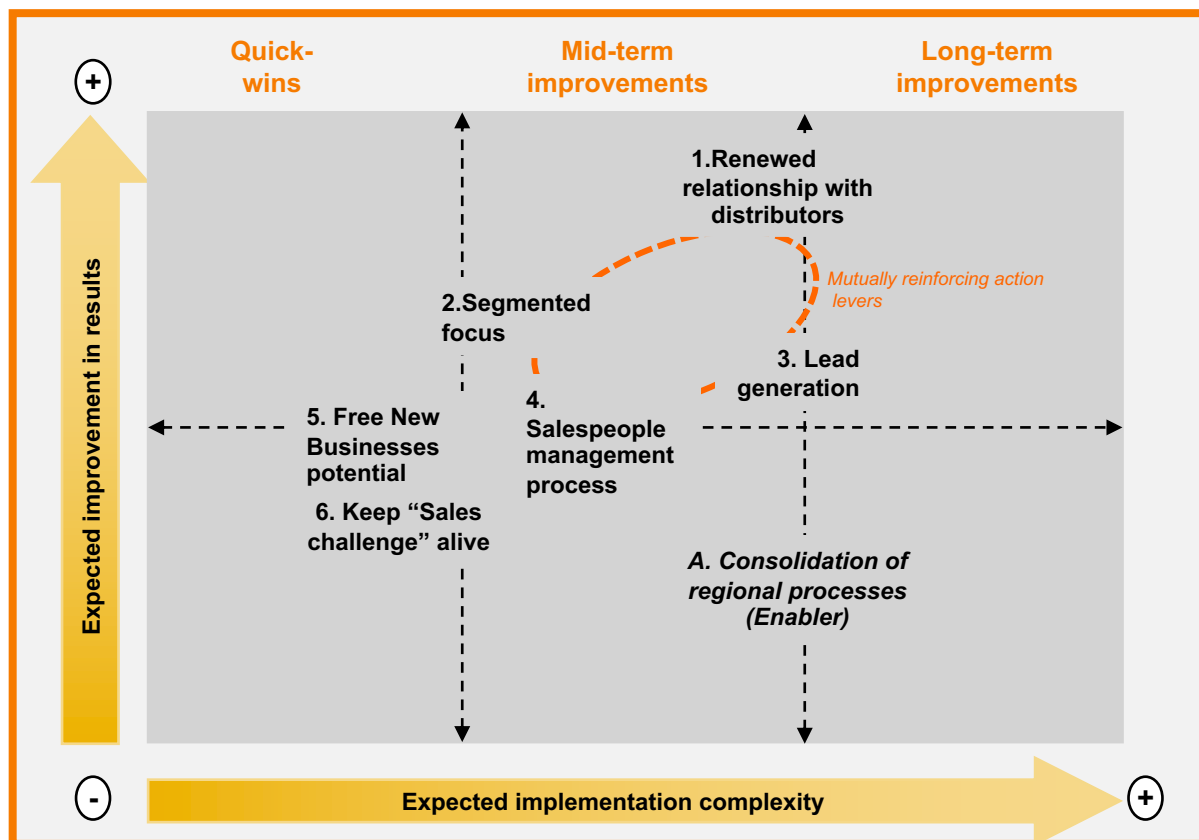
# A Sales Audit is an independent and objective assessment of the ability of the sales organization to cope with the market and strategic challenges it faces

- Sales audits must understand the market environment and current sales strategy, and then analyze all key components of a Sales organization



- Ultimate goal of sales audits is to identify and prioritize opportunities for improvement in the sales organization

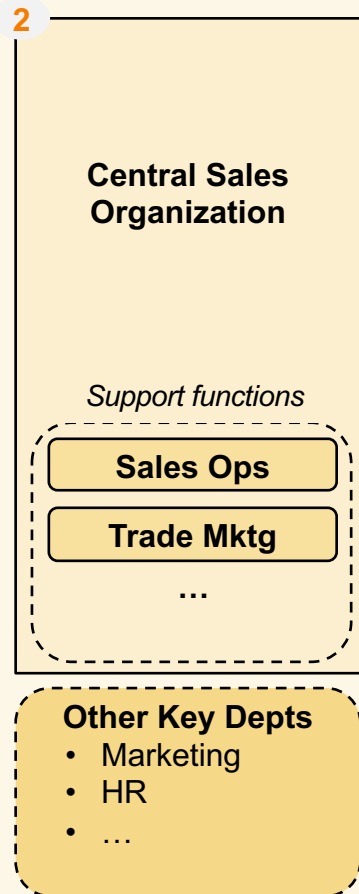
Example of Change map resulting from a Real-case Sales Audit



# Analysis must review the effectiveness of both the Central Sales Org and each of the channels

- General framework of macro- elements to assess -

## 1 Market conditions and Sales strategy



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Channels	Type	Applicability to Target segments			
		Consumers	SMEs	KAs	Operators
Online	In-house	●	◐	○	○
In/ outbound call centre	In-house /external	●	◐	○	○
Own shops	In-house	●	◐	○	○
Distributors (w/o SF)	External	◐	◐	○	○
Distributors (w/ SF)	External	◐	●	○	○
Taskforces	External	●	◐	○	○
Direct Salesforce	In-house	○	●	○	○
KAMs	In-house	○	○	●	○
Wholesale	In-house	○	○	○	●

# Sales management processes and systems are key to successful strategy execution, and will be evaluated in detail

- Typical, not-exhaustive checklist for Sales Audit -

1 Macro Audit	2 Sales Central Org. Audit	3 Channel-specific Audit
<ul style="list-style-type: none"> <li>• <b>Market size and growth trends</b></li> <li>• <b>Competitive situation</b></li> <li>• <b>Competitive advantages</b></li> <li>• <b>Company quantitative and qualitative objectives vs actual results</b></li> <li>• <b>Sales strategy</b></li> </ul>	<p><b>Structure</b></p> <ul style="list-style-type: none"> <li>• Sizing, dependencies and roles</li> <li>• Channel organization</li> </ul> <p><b>Profiles and skills</b></p> <ul style="list-style-type: none"> <li>• Product/ Market knowledge</li> </ul> <p><b>Support Functions</b></p> <ul style="list-style-type: none"> <li>• Sales Ops</li> <li>• Trade Marketing (<i>often included in Mktg dept</i>)</li> <li>• ...</li> </ul> <p><b>Support Systems</b></p> <ul style="list-style-type: none"> <li>• Dashboards, information integration, ...</li> </ul> <p><b>Motivation</b></p> <ul style="list-style-type: none"> <li>• Remuneration structure</li> <li>• Management culture</li> <li>• Communication policy</li> </ul> <p><b>Performance management</b></p> <ul style="list-style-type: none"> <li>• Channel management and coordination (results/ activities)</li> <li>• Budgeting and goal setting</li> </ul> <p><b>Interaction with other depts</b></p> <ul style="list-style-type: none"> <li>• Marketing, HR, Fulfillment, ...</li> </ul>	<p><b>Organization/ structure</b></p> <ul style="list-style-type: none"> <li>• Sizing, dependencies and roles</li> <li>• Level of Specialization</li> <li>• Portfolio assignment</li> </ul> <p><b>Profiles and skills</b></p> <ul style="list-style-type: none"> <li>• Product knowledge</li> <li>• Hiring and integration</li> <li>• Professional development</li> <li>• Career planning</li> </ul> <p><b>Support Systems</b></p> <ul style="list-style-type: none"> <li>• Sales reporting systems (e.g., BIs, ...)</li> <li>• Sales activity systems (e.g., CRMs, ...)</li> <li>• Contract entry systems</li> <li>• Information structure and reports</li> </ul> <p><b>Motivation</b></p> <ul style="list-style-type: none"> <li>• Attrition levels</li> <li>• Remuneration structure</li> <li>• Management culture</li> <li>• Communication policy</li> <li>• Emotional salary</li> </ul> <p><b>Internal/ External Channel management processes</b></p> <ul style="list-style-type: none"> <li>• Salespeople activities</li> <li>• Performance management (results/ activities)</li> <li>• Lead generation management</li> <li>• Activity planning</li> </ul> <p><b>Other key sales processes</b></p> <ul style="list-style-type: none"> <li>• New product introduction</li> <li>• Budgeting/ goal setting</li> <li>• Special Offer management</li> <li>• Distributor Pricing</li> </ul> <p><b>Other channel processes</b></p> <ul style="list-style-type: none"> <li>• Customer retention</li> <li>• Marketing interface</li> <li>• Exception management</li> </ul>

**Depth and breadth of Sales Audits depend on each customer's specific situation and needs**

# The analysis will be carried out based on both primary and secondary information

- Typical, not-exhaustive list of sources of information -

## Interviews

## Reports, information and other activities

**Central Sales Org.**

- Sales management
- For each support function:
  - Management
  - Staff
- For key depts(Marketing, HR, ...)
  - Management
  - Key staff interacting with sales function

**In-house channels**

- Channel manager
- Channel SF / staff (distinct hierachical levels)

**External channels**

- Channel management
- Salespeople
- Distributors, taskforce managers, ...

**Customers**

- Key customers (SMEs, KAs, ...)

- Market reports
- Internal market intelligence
- Sales data and reports – key indicators
- Results of quality controls (e.g., after-sales validation calls, ...)
- Results of customer loyalty surveys
- Sales activity data and reports
- Internal process manuals
- Sales support material
- Attendance in daily/ weekly sales meetings
- DILOs (Day in the life of) with salespeople
- Mistery shopping (shops, call centres, ...)

**Duration of sales audits may vary between 3 and 6 weeks**

# Sendas Value's experience in Sales audits

<b>Sector</b>	<b>Client description</b>
Industrial	#3 Spanish manufacturer of insulation materials for the construction industry
Industrial	#1 Spanish manufacturer of color pigments
Industrial	#3 Spanish manufacturer of frozen bread
Industrial	#1 Spanish Manufacturer of frozen pre-prepared food
Industrial	#1 Spanish Manufacturer of chemical reagents
Industrial	#1 World manufacturer of industrial gases (Spanish division)
Services	#1 Spanish funeral services operator
Utilities	#1 Spanish utility
Telecom	#4 Spanish telco operator



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