

Sales Process Scorecard.

[Watch: The top 10 tips for a strong sales process](#)

A qualitative assessment to help you understand if building and implementing a sales process (i.e. pipeline) may help. “Yes” means that you are in good shape with that aspect of your sales process. A “no” is an opportunity to build or refine, use the video lessons to address.

	YES	NO	IF “NO”...
Do you track new AUM/revenue opportunities?			Watch lesson
Do you make the most of new AUM/revenue opportunities?			Watch lesson
Are you able to accurately forecast new AUM/revenue?			Watch lesson
Do you track the following attributes?			
‣ Type of opportunity			Watch lesson
‣ Value of opportunity			Watch lesson
‣ Source of opportunity			Watch lesson
‣ Start and end date of opportunity			Watch lesson
‣ Opportunity stage (where they are and what’s next)			Watch lesson
Do you use a CRM to <i>track, manage, and report</i> on your pipeline?			Watch lesson
Do you have an effective follow-up process?			Watch lesson
Is there consistency in your prospect/clients’ experience?			Watch lesson
Do you understand what parts of your sales process are working and which are not?			Watch lesson