



SALES TEAM PERFORMANCE DIAGNOSTIC

FOR FOUNDERS & REVENUE LEADERS

EXECUTION REVIEW FRAMEWORK

PURPOSE

This assessment is designed to evaluate the actual execution quality of your sales team — not just outcomes.

FOR EACH SECTION:

- Answer honestly based on current reality.
- Score each question from 1–5 (1 = Poor/Never, 5 = Excellent/Always).
- Review the analysis and recommendations to identify structural constraints.

PAGE 01



PERFORMANCE DIAGNOSTIC

SECTION 1: OUTREACH & PIPELINE CREATION

QUESTIONS	1	2	3	4	5
Are your salespeople consistently generating new conversations daily?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Do they use multiple channels (email, LinkedIn, phone)?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

QUESTIONS	1	2	3	4	5
Is messaging personalized to the ICP or mostly generic?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Are they following a structured outreach sequence?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Are follow-ups consistent and persistent (not one-and-done)?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

SECTION SCORE: _____ / 25

SCORING INSIGHT

20–25 → Strong outbound engine

12–19 → Inconsistent, likely opportunity loss

Below 12 → Pipeline dependency risk

WHAT THIS REVEALS

If this is weak, your pipeline is not predictable — it's reactive.

HOW TO IMPROVE

- Implement structured multi-channel sequences (10–15 touches minimum)
- Define daily outreach minimums (non-negotiable)
- Rewrite messaging to focus on pain + outcome, not service
- Introduce accountability tracking (daily/weekly)

SECTION 2: PIPELINE HEALTH & STAGNATION

QUESTIONS	1	2	3	4	5
How many deals have had no activity in 7+ days?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Does every deal have a clearly defined next step?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Are deals moving forward consistently week-to-week?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Are reps proactively advancing deals or waiting?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Is pipeline reviewed regularly with structure?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

SECTION SCORE: _____ / 25

SCORING INSIGHT

20–25 → Clean, controlled pipeline

12–19 → Some leakage

Below 12 → Major revenue loss hiding in pipeline

WHAT THIS REVEALS

A stale pipeline is one of the biggest hidden revenue killers.

HOW TO IMPROVE

- Enforce "no next step = dead deal" rule
- Weekly pipeline audits (mandatory)
- Create SLAs for deal movement
- Remove emotional attachment to bad deals

PAGE 03



PERFORMANCE DIAGNOSTIC

SECTION 3: CRM DISCIPLINE & ACTIVITY

QUESTIONS	1	2	3	4	5
Are all activities logged consistently?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Are deal stages accurate and up to date?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Are notes detailed and useful?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Can you trust the pipeline data at any time?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Is the CRM used proactively or just as a requirement?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

SECTION SCORE: _____ / 25

SCORING INSIGHT

20–25 → Operationally strong

12–19 → Gaps in visibility

Below 12 → Flying blind

WHAT THIS REVEALS

If CRM data isn't reliable, you cannot scale or forecast.

HOW TO IMPROVE

- Define CRM standards (what "good" looks like)
- Enforce usage through accountability
- Tie CRM hygiene to performance reviews
- Simplify workflows if adoption is low

PAGE 04



PERFORMANCE DIAGNOSTIC

SECTION 4: CONVERSATION QUALITY & STRUCTURE

QUESTIONS	1	2	3	4	5
Do reps follow a structured discovery process?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

QUESTIONS	1	2	3	4	5
Are they asking deep, business-relevant questions?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Do they quantify problems (time, money, impact)?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Are they controlling the conversation or reacting?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Are calls intentional or improvised?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

SECTION SCORE: _____ / 25

SCORING INSIGHT

20–25 → High-level selling

12–19 → Surface-level conversations

Below 12 → Order-takers, not salespeople

WHAT THIS REVEALS

Most sales teams don't have a closing problem — they have a discovery problem.

HOW TO IMPROVE

- Implement a defined discovery framework
- Train on problem amplification + quantification
- Record and review calls weekly
- Eliminate "winging it"

SECTION 5: PRODUCT / SERVICE MASTERY

QUESTIONS	1	2	3	4	5
Can reps clearly articulate your value in under 30 seconds?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Do they understand the real outcomes you deliver?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Can they tailor messaging by industry or persona?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Do they confidently handle technical or strategic questions?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Do they sell outcomes vs features?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

SECTION SCORE: _____ / 25

SCORING INSIGHT

20–25 → Strong positioning

12–19 → Inconsistent messaging

Below 12 → Confusion → lost deals

WHAT THIS REVEALS

If reps don't fully understand what you do, prospects won't either.

HOW TO IMPROVE

- Build a clear messaging framework (ICP + pain + outcome)
- Create scenario-based training (by industry/use case)
- Test reps regularly (not optional)
- Eliminate feature-heavy selling



SECTION 6: OBJECTION HANDLING

QUESTIONS	1	2	3	4	5
Do reps handle objections confidently in real time?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Can they isolate the real objection vs surface-level pushback?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Do they reframe objections into value conversations?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Are they consistent in handling common objections?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Do they avoid defaulting to "let me follow up"?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

SECTION SCORE: _____ / 25

SCORING INSIGHT

20–25 → Strong closers

12–19 → Missed opportunities

Below 12 → Deals dying unnecessarily

WHAT THIS REVEALS

Objections are where most deals are won or lost.

HOW TO IMPROVE

- Build a structured objection framework
- Drill top 10 objections weekly
- Create objection playbooks by scenario
- Reinforce confidence through repetition

PAGE 07



PERFORMANCE DIAGNOSTIC

SECTION 7: FOLLOW-UP & DEAL CONTROL

QUESTIONS	1	2	3	4	5
Are follow-ups timely and structured?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

QUESTIONS	1	2	3	4	5
Do reps maintain control of deal timelines?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Are next steps always scheduled (not vague)?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Are prospects allowed to go dark?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Is there a clear cadence post-call?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

SECTION SCORE: _____ / 25

SCORING INSIGHT

20–25 → Strong deal control

12–19 → Inconsistent follow-up

Below 12 → Revenue slipping through cracks

WHAT THIS REVEALS

Most deals are lost in follow-up, not on the call.

HOW TO IMPROVE

- Define follow-up cadences per stage
- Require calendar-based next steps
- Implement no-ghosting rules
- Track follow-up KPIs

