

## SALES SWOT

### Session 1 - Discovery

#### Part 1 – Set Meeting Goals and Expectations

#### Part 2 - Problems/Challenges

##### *Marketing*

1. Identify current services and current products
2. Identify current market
3. Identify current targets
4. Identify current clients
5. Define the current sweet spot(s)
6. Define the current problematic spot(s)
7. What is your marketing strategy to enhance your brand recognition with your target markets?
8. What is your lead generation process?
9. Are you sure your current marketing efforts are resonating with your intended targets?

##### *Sales*

1. Identify current sales revenues – in total, and by specific client
2. Define your current business development/sales process – who is contacted, how, timeframe to getting an order, what kind of order
3. Do you have a prospect pipeline? What does it look like? How do you determine the probability of closing an opportunity? Do you know your close ratio? Please provide a copy of the pipeline if you have one.
4. Define pricing and how it is determined for both your services and products.
5. Do you have metrics for sales re: outreach calls, contacts, meetings, pipeline reports?

### Session 2 - Recommendations

#### Action Plan

1. Set revenue goals and desired outcomes
2. Define accountabilities
3. Identify marketing and sales tools and resources required
4. Identify dates and milestones
5. Identify consequences for failure