

Establishing a sales process and never checking it is a bit like buying a car and never changing the oil. Sure, it will run for a while until it breaks down and leaves you stranded on the side of the freeway. If you want to understand how well your sales process is doing, ask and answer the following questions. And hey, Be honest!

# Spot the Blindspots

Do-it-yourself Sales Audit  
Workbook

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# Why Audit Your Sales Process:

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Every business must have a well-defined sales process that is the step-by-step journey your customer takes from being a stranger or not knowing about you finally paying the bill and working with you. At any given point in time, you should have a clear understanding of the opportunities you have in your pipeline and what are the touchpoints where you are meeting them.

Building a sales process is not a one-and-done action. If you are neglecting the 'black box of the sales process by never auditing it, it will stagnate, stop giving results, and revenues will plateau. You need to revisit and review the sales process regularly.

Bur hey, if you haven't ever done it, don't bash yourself up!

We all tend to miss important stuff due to oversight, lack of prioritization, lack of experience, or merely because we want to shirk the heavy lifting for later.

But now... you've got hold of this workbook which will help you dissect your current sales process to gain insight and understanding of your sales engine and what needs to be fixed to Solidify your Sales Conversion.

## Have you defined your ideal clients, and can you describe them in words with great detail?

*A good prospect is one who is as close as possible to your ideal client definition. Once you have this, you are much clearer about what they need, how your solution fits their need, and what you should be saying to them to have desired outcomes at every interaction. It also helps you identify who is not the right fit for you, so you don't waste your time with those who aren't.*

## When was the last time you reviewed your marketing materials, existing content, funnel flow, links on the website, email campaigns, automation, and other sales resources?

*Often, we are so occupied with creating new stuff that we tend to miss out on the broken links and obsolete messaging that does not align with our current sales process and offers. It is essential to review and refresh the*

marketing collaterals to give a consistent experience and education to the prospects thus helping them in their decision-making process.

**Do you establish and manage sales goals for the revenue you want to churn out every quarter? How**

**are these goals determined, and what is the monitoring process and system?**

*A financial goal is not a sales goal. When you break down the 'How you are going to achieve the revenue figure' into the number of clients you need, the number of conversations you need to have, the number of launches you want to do, and more, that's when you have sales goals. Clarity around 'What you need to do' helps you organize your time and focus your efforts. It also lets you know when to push the pedal more and when you can take a pitstop break.*

**Have you broken down your sales goals into clear and achievable activities for each week/month/quarter?**

*Wise people have said, "a goal without a plan is a dream." A big reason for you not making progress is because you do not know which sales action to take daily. Having a goal broken down into smaller targets which are further crystallized by specific actions, is pivotal to achieve predictable growth.*

### How would you rate the quality of your current leads? What do your marketing and sales process need to do to make sure a lead is qualified for sales?

*Getting and qualifying quality leads is one of the most critical parts of the sales process. Determine the quality of your current leads. Not all leads are equal, and not all leads are ones you want for your business. After all, the leads you put in your sales funnel can increase or decrease the chances for sales success down the line.*

### Are you doing opportunity management? What is your definition of an opportunity?

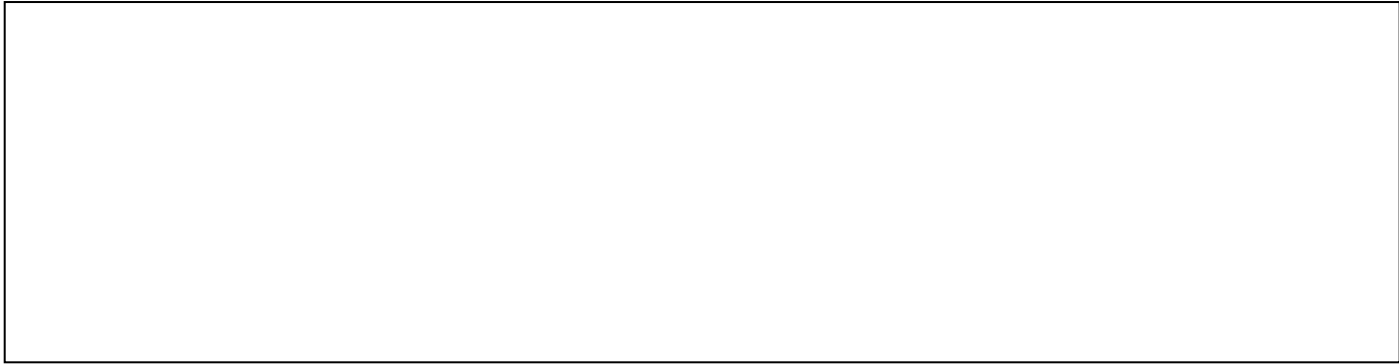
*Most coaching and consulting businesses thrive on their personal+professional network and referrals. Even when you do webinar launches/free challenges, the leads from previous launches are a goldmine and present valid sales opportunity even today. Do you have a clear networking /referral/nurturing strategy that you put into action every month?*

### Are you Missing Steps that could help bring in business?

*Take a simple example: how many times does your process recommend that you follow up with an unresponsive lead on the first contact attempt? Once? Twice? Three times?*

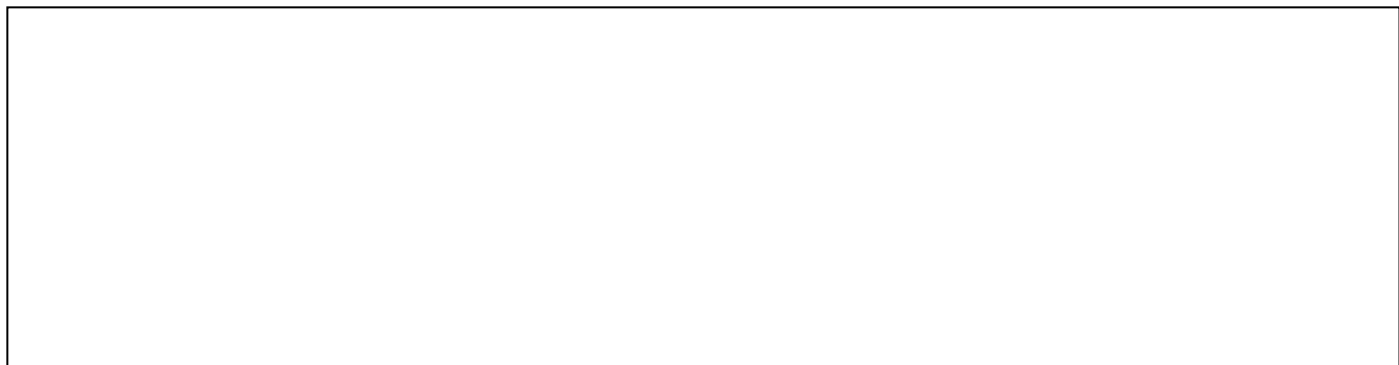
*It's not an easy question. If the lead is dead cold and never gets back to you at all, you don't want to waste scarce time that could be better used pursuing warm leads. However, you also don't want to quit too early and possibly lose sales that could be earned with better persistence. It's possible that adding a step (additional follow-up) might be worth the extra time investment. But you won't know unless you try it out and see how it works.*

*Think about how your business manages, nurtures, and follows up with potential clients.*



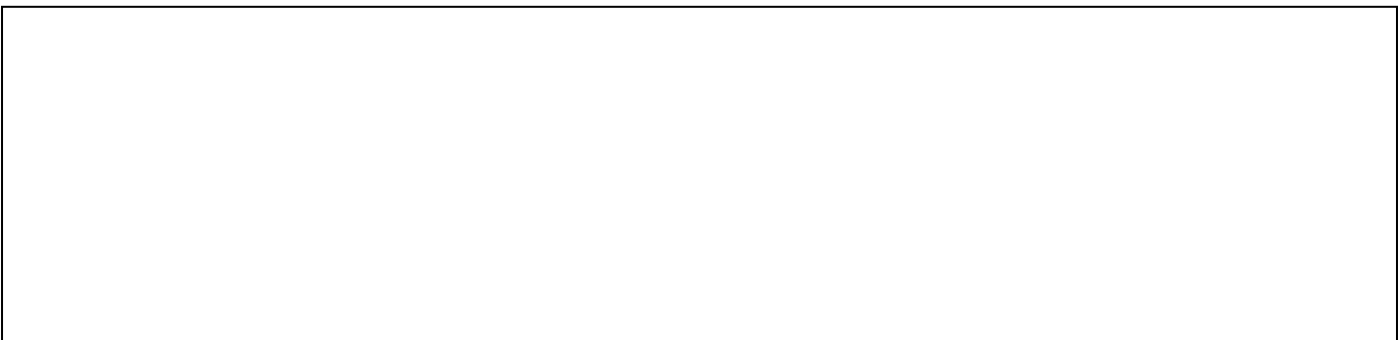
When you're speaking with a potential client, how comfortable you are in mapping out their pain points, tapping into their desires, building rapport, and then shifting the discussion to how you might be able to help them with your program without really giving them a free coaching session.

*The discovery call is like a match-making process. You should provide the prospect enough information that helps them in decision-making and helps you validate if they are the kind of client you would like to work with. Great initial conversations with a prospect should help you build rapport, understand their needs, and bring them to the conclusion that you can help them. And that they should hire you! Everyone has a different style, and you should find the formula that works for you.*



Do you have a thick skin towards rejection?

*The unsexy secret of Sales is that you will get more rejections than Yeses. But your road to Yeses can be faster if you have a strategic, authentic, and streamlined sales system which helps you navigate through those days of darkness and months when you feel there isn't any traction. Your system should help you gain momentum and get on track after you crash into rejections.*



## Are you preparing yourself for the future? How do you document your sales process? Where does this documentation land?

*One of the biggest mistakes entrepreneurs make is that they do not document their journey to growth. You are probably not capturing the learning lessons from your sales calls, the objections handled, and how you are improving your sales conversations. Today you are doing sales yourself; someday, you might need someone to assist you with it. The documentation you become the training modules for tomorrow!*

Take a look at your answers. What do you find?

Where are the blindspots – the things which you have missed having in your sales process?

What is the area of improvement?

Where you need to put more focus?

Write down the specific steps you intend to take and commit to taking action within the next 48 hours.

If hopping over a call with me is one of the action items, head over to [book a call](#). And hey, no matter what, I believe in your potential, and I am cheering you on!

**Roshni Baronia**  
**Strategic Sales Expert**

My [VIP Intensive](#) helps you skyrocket your sales conversion in your business. [Know more](#).