



WASATCH SOFTWARE CONSULTING



Questions to consider to set up ACT! effectively

1. Who buys your services?
2. How do you make initial contact with these prospects?
3. Cold calls?
4. Sales leads provided by the company?
5. Sales leads provided by some other source?
6. How do you get these leads today?
7. If an initial literature package is sent, who sends it?
8. Do you know which lead sources result in the most sales?
9. What is your customer buying cycle?

*Think about your typical sale:*

1. What is the length of your sales cycle, the total time from your initial contact to closing the sale?
  2. What actions (telephone calls, personal visits, quotations, demos, etc.) do you take with your prospect to get an order?
  3. Once you have a qualified sales lead, do you manage and monitor this sales process until you get an order? If so, how?
  4. Do you know if prospects are getting bogged down at some point in the sales process? If so, where?
  5. When closing a sale, who must you deal with at an account? Do you have a single decision maker, or many contacts at an account?
  6. How much repeat business do you do? Do your customers reorder from you on a continuing basis? On average, how much business do you do with each customer in a typical year?
  7. How many regular customers does each sales person manage now?
  8. How many new leads do you get per month?
  9. To meet your corporate growth objectives, how many new customers do you need?
  10. What percentage of your prospects do you successfully convert to customers?
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1. What activities after the sale do you pursue with your customers?
  2. If you prepare proposals or price quotations for your prospects, who does the work and how?

*For reporting aspects:*

1. Thinking about the key members of your management team, what information, *potentially available from the sales team*, would permit these managers to do a better job in their areas?
2. Consider the flip-side, what information do you think your sales team wishes they had from these functional managers?
3. Think about the people your sales team routinely communicates with at your company. Who are they? What information does the sales team send them now? How do they send this information?
4. What information do they get from them now? How do they get this information?
5. Are there other people the sales team might regularly communicate with? Who? What about?
6. To help them close more sales, what information does the sales team wish it had at their fingertips?
7. How is order entry handled in your company?