B2B Sales Capability Self-audit
Key capabilities for high performance sales teams

Scope and Instructions

This form is designed as a quick, simple "self-audit" checklist to surface and prioritize significant gaps in tools, processes and capabilities for sales teams involved in complex B2B sales (typically those with multiple stakeholders, multiple value propositions for individual stakeholders, and/or intangible value in the product and solution set). It is not designed to replace a thorough audit and review of sales process and methodology.

We split the self-audit assessment into capabilities across three levels of management of your sales organization:
- **Commercial leadership** – typically CCO, CRO, SVP Sales and VP- and Director-level leaders across sales and marketing roles,
- **Front-line managers** – those directly managing individual contributors, and
- **Salespeople** – customer-facing individual contributors.

We recommend engaging and interviewing individuals from all three levels in reviewing the capabilities and gaps, and where possible, utilizing *data* and specific examples (rather than just opinions) to assess each area.

Once the audit is complete, prioritize the most significant gaps ("which gaps are currently causing the largest loss in potential productivity? How can we confirm this?") before assessing potential solutions. You are generally better off addressing 2-3 significant gaps well than trying to fix 10 things at once.

For discreet advice and support, contact us at info@swaggersales.com.

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COMMERCIAL LEADERSHIP

Criteria	Assessment criteria	Your assessment[1]	Notes
Clear, defined sales process	Organization understands and uses a simple, clear multi-stage process from initial opportunity qualification through to contract close (and, optionally, handoff to Operations for delivery, implementation and account management), with appropriate qualification gates and approval processes to move through stages. All members of the sales team can understand and explain the stages and major gates.	🟢 🟡 🔴	
Effective forecasting methodology	Sales process pipeline stages have assigned probabilities that feed a reliable forecasting engine for active opportunities. Managers forecast on a regular agreed cadence, and forecasts are generally reliable enough to support resource planning for the business.	🟢 🟡 🔴	
"Big-deal" review process	Team has a simple, effective and efficient small-group review mechanism to review pricing and strategy on significant opportunities, and a means to share the lessons coming out of these reviews with the broader team for ongoing organizational learning.	🟢 🟡 🔴	

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[1] **Green** – broadly meets criteria, no significant gaps **Amber** – missing one or more important element **Red** – Missing two or more important elements

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Aligned mission and KPIs

All sales team members understand the high-level business goals and key metrics (such as revenue, margin, customer net promoter score, renewal rates and market share targets). Each member of the team can explain how their role contributes to these goals. All front-line managers and salespeople have a remuneration package and incentives closely aligned to the broader business goals to which they contribute.

Competency dashboards and performance management

Sales leaders can access dashboards showing competencies (strengths and weaknesses on a per-team and individual basis) across the team to identify gaps before they become costly in lost deals and margins. Performance management processes are both pipeline-focused (the *deals*) and capability-focused (the *people*).

Drill-down visibility to front-line activity and quality-of-work

Leaders should have drill-down visibility to account plans, pre-call plans, manager feedback and coaching, and competency assessment data to drive discipline and accountability for both individual contributors and their direct managers. Data should show *quality* of front-line planning and execution, not just *quantity* / activity metrics.

FRONT-LINE MANAGERS

Criteria	Assessment criteria	Your assessment[2]	Notes
Leadership and retainment	Managers set a clear vision for the team which the reps can clearly articulate. Managers build trust and transparency and foster a performance culture. Sales rep churn is low, loss of high performers is rare.	🟢 🟡 🔴	
Recruitment and onboarding	Managers have the tools and skills to effectively attract, recruit and retain talent. Team has a low mis-hire rate (for example, hires that fail within 6 months for high velocity sales, and within 12 months for enterprise sales).	🟢 🟡 🔴	

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[2] **Green** – broadly meets criteria, no significant gaps. **Amber** – missing one or more important element. **Red** – Missing two or more important elements.

Competency Assessment and segmentation	Managers have the tools and skills to develop an *evidence-based defensible view* of the competencies and gaps of each person on their team (for example, sourced from reviews of rep planning, and from field travel observations). Managers use and understand a simple, common competency framework aligned across the organization. Managers segment their team according to each person's development stage and needs and can explain their leadership approach for each team member. (For example, **teach** [new hires] vs **coach** [mid-performers] vs **motivate** [hi-performers]) Managers behave as leaders, not "super-reps", and understand the importance of coaching *people*, not just *deals*.	⬤ ⬤ ⬤
Coaching skills and performance management	Managers have the tools and skills to set performance and competency goals and appropriate coaching cadences for each person on their team based on needs and capabilities, and to effectively motivate and coach each person. Managers can ramp new hires quickly, increase the productivity of mid-performing reps and retain and motivate their top performers. Managers implements a simple effective process for the team to learn from each other and from significant closed-won and closed-lost opportunities.	⬤ ⬤ ⬤
Forecasting and revenue performance (team)	Managers can forecast reliably from their team and tend to meet or exceed realistic targets.	⬤ ⬤ ⬤

SALESPEOPLE / INDIVIDUAL CONTRIBUTORS

Criteria	Assessment criteria	Your assessment[3]	Notes including any significant gaps and evidence
Solution-sales mindset	Salespeople think beyond the products and services and focus on solving customer challenges, not "pushing product". Reps understand the industry and both their own and competitors' products and services and can convey value propositions that resonate with the different buying personas (for example, user, executive sponsor, procurement etc.) within their typical customer organizations.	🟢 🟡 🔴	
Territory and account management	Reps demonstrate the ability to chase the biggest opportunities within their territory by engaging the right *people* in the right *accounts*. They can plan and prioritize the key accounts that present the largest opportunities, and understands the importance of, and are capable of, gaining access to more senior (C-Suite) roles within these accounts where necessary.	🟢 🟡 🔴	
Pre-call planning	Reps can robustly and optimistically plan for their most significant customer meetings, and where team selling is required, can quickly align a team prior to a client meeting. Reps enter every significant meeting with *intent*, including an optimistic meeting goal ("advance"), and a credible game plan for achieving the desired meeting outcome. Ramped reps are rarely surprised by unexpected client objections, and *never* by predictable ones.	🟢 🟡 🔴	

[3] **Green** – broadly meets criteria, no significant gaps. **Amber** – missing one or more important element. **Red** – Missing two or more important elements.

Client-facing key meeting execution skills

Reps can consistently execute critical sales meetings well, gaining the advance where possible and adapting their meeting game plan on the fly where necessary. They can gain credibility quickly (including with senior stakeholders), can agree a clear agenda, efficiently exchange the key information, listen actively and respond to client "tells", understand and capture client value in the discussion, frame price to defend value, push back politely where necessary, make credible proposals to advance the sale, and surface and generally overcome client objections to achieve the advance.

Forecasting and revenue performance (individual)

Reps can forecast reliably and tend to meet or exceed realistic targets.