

Teneo Marketing and Sales Assessment

1) Does your organization share its corporate vision and objectives with all employees, including the marketing and sales team members?

2) Are your sales and marketing objectives aligned with your corporate objectives?

3) What is your unique selling proposition that differentiates you from your competitors?

4) Do your marketing materials/tools represent your USP (unique selling proposition) message?

5) What are the current marketing materials/initiatives/activities that generate sales results for your organization?



6) Have you developed a Marketing Plan? Have you developed a Sales Plan? What is your execution plan? Who is held accountable for the strategy and execution plan? Does your marketing and sales plan integrate and align to achieve profitable sales?

7) Do you develop individual customer plans that roll into the Company Marketing & Sales Plan?

8) What marketing and sales tools are currently incorporated into your sales process?

9) How do you generate and manage your leads? How does the marketing team hand over the leads to the sales team? How does the sales team communicate to others in the organization about their leads?

10) Do you have a system in place to track leads, referrals, appointments, presentations, signed contracts, closed sales, average size of sale and the costs associated with each activity?



11) How do you develop your sales goals? (i.e. by region/territory/product or service group/salesperson/timeline)

12) Do you offer a sales compensation/incentive plan to your sales team? Is your marketing team compensated or given incentives for achieving sales results?

13) Do your sales results reflect the efforts of your marketing activities?

14) Do your marketing and sales teams plan the yearly marketing and sales plans together?

15) How often do your marketing and sales teams get together throughout the year to review the status and results of your plans?



16) According to the Harvard Business Review – they define the various levels of integration between marketing and sales teams as follows::

Undefined – Sales and marketing teams work independently with each having its own tasks and agendas. Meetings between the two are ad hoc and are usually devoted to conflict resolution rather than pro-active co-operation.

Defined – Sales and marketing set-up processes and rules to prevent disputes. They each know who is supposed to do what and they stick to their own tasks. They work together on large events i.e. tradeshow and customer events.

Aligned – Clear boundaries exist, but they are flexible. Both groups engage in group planning and training. Sales group understand and uses marketing terminology such as “value proposition” and “brand image”. Marketers confer with salespeople on important accounts.

Integrating – Both groups redesign the relationship to share structure, systems and rewards. Marketing focuses on strategic, forward-thinking tasks and is deeply involved in the management of key accounts. The two groups develop and implement shared metrics. Budgeting becomes more flexible and less contentious. A “rise or fall together culture develops”

Which category best describes your organization’s marketing and sales team’s level of integration?

17) How would you define the brand/personality of your company’s products and services? Does your sales team represent this brand?

18) What monthly/weekly sales and marketing metrics does your organization measure and track?



19) Who is your ideal profitable client? How does your marketing team attract them? How does your sales team close the deal with them?

20) What are the strengths and weaknesses of your marketing team? What are the strengths and weaknesses of your sales team?

21) How do you measure the ROI of your current marketing investments?

Please email your completed assessment to lisa@teneoreresults.com