Sales Performance Diagnostic Toolkit

Identifying Knowledge, Skill, Process, Accountability, and Market/Offer Gaps in Sales Enablement

Purpose of the Toolkit

The Sales Performance Diagnostic Toolkit is designed to help identify the root causes of sales performance gaps before recommending a solution. Instead of assuming that low conversion, inconsistent follow-up, or weak client engagement can be solved through training alone, this toolkit provides a structured way to examine the issue from multiple angles.

The toolkit helps determine whether the sales problem is caused by a knowledge gap, skill gap, process gap, motivation or accountability gap, or market and offer-related gap. By gathering evidence through interviews, checklists, observation, and inquiry review, the toolkit supports a more accurate diagnosis of the problem and helps guide the selection of appropriate learning and performance solutions.

This tool was created as part of a sales enablement project focused on improving how client inquiries are handled, followed up, and converted into confirmed training engagements.

How to Use This Toolkit

This toolkit is intended to be used during the analysis phase of a sales enablement project. It may be used by an instructional designer, training officer, sales lead, manager, or performance consultant who needs to understand why a sales performance issue is occurring.

The toolkit should be used before designing a training course, job aid, coaching plan, or sales process improvement. Each section is designed to collect evidence from a different source, such as stakeholders, sales personnel, client inquiry records, sales conversations, and existing sales processes.

The recommended process is:

1. Start by interviewing stakeholders to clarify the business problem and expected sales outcomes.
2. Interview sales personnel to understand their challenges, support needs, and current practices.
3. Use the knowledge check to identify possible product or service knowledge gaps.
4. Use the observation checklist to examine how sales conversations are handled in practice.
5. Review the current sales process to identify workflow, documentation, or follow-up issues.
6. Analyze lost inquiries or unconverted leads to identify possible patterns.
7. Classify the findings using the five gap categories.
8. Use the results to recommend the most appropriate learning or performance solution.

The goal is not to prove that training is needed. The goal is to find out what is actually affecting sales performance and recommend the right intervention based on evidence.

Diagnostic Framework

This toolkit uses a five-category diagnostic framework to identify the possible causes of sales performance gaps. The framework helps separate issues that can be addressed through training from issues that may require process improvement, coaching, accountability systems, sales tools, or business-level decisions.

The goal is not to assume that training is always the answer. The goal is to identify what is actually affecting sales performance and recommend the most appropriate intervention based on evidence.

Gap Category	Core Question	Common Indicators	Possible Solutions
Knowledge Gap	Do they know what they need to know?	Inaccurate explanation, difficulty answering questions,	Product training, FAQs, service guides, job aids

		inconsistent service knowledge	
Skill Gap	Can they apply what they know in real conversations?	Weak questioning, poor objection handling, low confidence, unclear next steps	Role-play, coaching, simulations, guided practice
Process Gap	Is there a clear and usable workflow?	Missed follow-ups, unclear lead ownership, no tracker, inconsistent process	SOPs, checklists, templates, trackers, process maps
Motivation or Accountability Gap	Are expected behaviors being done consistently?	Low follow-through, unclear targets, weak monitoring, no feedback routine	Performance check-ins, lead ownership, dashboards, coaching
M**arket or Offer Gap**	Is the offer aligned with the client and market?	Price concerns, weak lead quality, low urgency, competitor comparisons	Offer repositioning, pricing review, better messaging, lead qualification

This framework will be used when reviewing interview responses, sales observations, process findings, and lost inquiry data. Each finding should be classified under the gap category that best explains the root cause of the issue.

Data Collection Plan

The diagnostic process uses multiple data sources to understand the sales performance problem from different perspectives. This helps avoid relying on assumptions and supports a more evidence-based analysis.

Each data source is connected to one or more gap categories: knowledge, skill, process, motivation or accountability, and market or offer. The information collected will be used to identify patterns, classify the likely root causes, and recommend the most appropriate learning or performance solution.

Data Source	Purpose	Collection Method	Gap Categories Supported

Stakeholders or Management	Understand the business problem, expected outcomes, sales targets, current concerns, and previous attempts to address the issue	Stakeholder Interview Guide	Process, Accountability, Market/Offer
Sales Personnel	Identify real challenges in inquiry handling, follow-up, proposals, and client communication	Sales Team Interview Guide	Knowledge, Skill, Process, Accountability
Product or Service Knowledge	Check whether sales personnel understand the service, target clients, inclusions, requirements, value proposition, and common client questions	Product/Service Knowledge Check	Knowledge
Sales Conversations	Observe how inquiries are handled in actual or simulated client interactions	Sales Conversation Observation Checklist	Skill, Knowledge, Process
Current Sales Process	Review whether there is a clear workflow for inquiry handling, lead tracking, proposal preparation, follow-up, and handoff	Sales Process Review Checklist	Process, Accountability
Lost or Unconverted Leads	Identify patterns in leads that did not convert, including reasons related to pricing, timing, follow-up, client fit, or offer clarity	Lead and Lost Inquiry Review Template	Process, Accountability, Market/Offer
Existing Sales Materials	Review whether current scripts, brochures, proposals, FAQs, and marketing materials support clear and consistent communication	Document and Materials Review	Knowledge, Process, Market/Offer

The goal of collecting data from multiple sources is to compare what people say, what the process shows, and what the sales records reveal. When the same issue appears across multiple sources, it becomes stronger evidence of a real performance gap.

Stakeholder Interview Guide

Purpose

The Stakeholder Interview Guide is used to clarify the business problem behind the sales performance gap. It helps identify the expected sales outcomes, current challenges, possible root causes, previous actions taken, and success measures from the perspective of management or decision-makers.

This interview should be conducted before designing any training, coaching, job aid, or sales process improvement. The goal is to understand what the organization needs to improve and what evidence is available to support the diagnosis.

Recommended Participants

This interview may be conducted with one or more of the following:

- Business owner or senior manager
- Training or operations manager
- Sales lead or sales supervisor
- Marketing lead
- Program coordinator
- Any decision-maker involved in sales, client inquiries, or training service delivery

Instructions

Use the questions below as a semi-structured interview guide. The interviewer may ask follow-up questions depending on the participant's responses. Responses should be summarized and later classified using the five diagnostic gap categories: knowledge, skill, process, motivation or accountability, and market or offer.

Interview Questions

A. Business Problem and Desired Outcome

1. What sales performance issue are you most concerned about right now?
2. What specific sales outcome do you want to improve?
3. What does successful performance look like for this sales process?

4. What is the current performance level, if data is available?
5. What is the desired or expected performance level?
6. Which product, service, program, or client segment is most affected?
7. Why is this issue important to the business right now?

B. Current Sales Process

8. How are client inquiries currently received, assigned, and handled?
9. What is the expected process from initial inquiry to confirmed booking or enrollment?
10. Which part of the process seems to have the most difficulty?
11. Are there standard templates, scripts, trackers, or tools used by the team?
12. How consistent is the team in following the expected sales process?
13. How are leads, follow-ups, proposals, and lost inquiries currently documented?

C. Observed Performance Gaps

14. What do you notice sales personnel doing well?
15. What do you notice sales personnel struggling with?
16. Are there common client questions that the team has difficulty answering?
17. Are there common objections that the team has difficulty handling?
18. Are follow-ups completed consistently and on time?
19. Are there differences in performance between team members? If yes, what differences have you observed?

D. Possible Root Causes

20. What do you think is causing the sales performance issue?
21. Do you think the issue is related to lack of product or service knowledge?
22. Do you think the issue is related to communication, persuasion, objection handling, or closing skills?
23. Do you think the issue is related to unclear process, lack of tools, or inconsistent workflow?
24. Do you think the issue is related to motivation, ownership, urgency, or accountability?
25. Do you think the issue is related to pricing, client demand, competition, lead quality, or how the offer is positioned?

E. Previous Actions Taken

26. What actions have already been taken to address this sales issue?
27. Has any training, coaching, meeting, reminder, or process change already been implemented?
28. What worked well from those previous actions?
29. What did not work or did not last?
30. What support or resources are currently missing?

F. Success Measures

31. What indicators should improve if the solution is successful?
32. Which metrics are currently tracked?
33. Which metrics should be tracked moving forward?
34. How soon would you expect to see improvement?
35. What would make you confident that the problem has been addressed?

Notes and Evidence Summary

Use the space below to summarize important findings from the stakeholder interview.

Key Finding	Evidence or Example	Possible Gap Category	Follow-Up Needed

Initial Gap Indicators

After the interview, mark any gap categories that appear to be possible causes based on the stakeholder's responses.

Gap Category	Possible Indicator Present?	Notes
Knowledge Gap	Yes / No / Unsure	
Skill Gap	Yes / No / Unsure	
Process Gap	Yes / No / Unsure	

Motivation or Accountability Gap	Yes / No / Unsure	
Market or Offer Gap	Yes / No / Unsure	

Sales Personnel Interview Guide

Purpose

The Sales Personnel Interview Guide is used to understand the challenges experienced by the people directly involved in handling client inquiries, follow-ups, proposals, and sales conversations. It helps identify what sales personnel know, what they find difficult, what tools they use, how they follow the current process, and what support they need to improve performance.

This interview provides the frontline perspective of the sales performance gap. It should be compared with stakeholder responses, process review findings, sales conversation observations, and lost inquiry data to identify patterns and root causes.

Recommended Participants

This interview may be conducted with personnel who are involved in any part of the sales or client inquiry process, including:

- Sales personnel
- Training coordinators who respond to inquiries
- Administrative staff who receive client messages
- Program coordinators involved in proposal preparation or client follow-up
- Team members assigned to lead tracking, enrollment, booking, or client coordination

Instructions

Use the questions below as a semi-structured interview guide. The interviewer may ask follow-up questions depending on the participant's answers. Responses should be summarized and later classified using the five diagnostic gap categories: knowledge, skill, process, motivation or accountability, and market or offer.

The purpose of the interview is not to blame the personnel for sales performance issues. The purpose is to understand what makes the task difficult and what support, tools, or changes may help improve performance.

Interview Questions

A. Role and Current Responsibilities

1. What is your role in the sales or client inquiry process?
2. What types of inquiries or clients do you usually handle?
3. What sales-related tasks are you responsible for?
4. At what point do you become involved in the process?
5. What does a successful inquiry or client interaction look like for you?

B. Product or Service Knowledge

6. How confident are you in explaining the service or program to a potential client?
7. Which parts of the service or program are easiest for you to explain?
8. Which parts are most difficult or confusing to explain?
9. What client questions are hardest to answer?
10. Are there details about pricing, inclusions, schedule, requirements, or certification that you are unsure about?
11. What information do you usually need to confirm with someone else before responding to a client?

C. Sales Conversation and Communication

12. How do you usually start a conversation with a potential client?
13. What questions do you ask to understand the client's needs?
14. How do you explain the value of the service or program?
15. What objections or concerns do clients commonly raise?
16. Which objections are hardest for you to handle?
17. How do you usually encourage the client to take the next step?
18. What part of the sales conversation feels most challenging for you?

D. Process and Tools

19. What process do you follow from initial inquiry to follow-up or proposal?

20. Is the process clear to you? Why or why not?
21. What tools, templates, scripts, trackers, or reference materials do you currently use?
22. Are these tools helpful? What is missing or difficult to use?
23. How do you track client status, follow-ups, proposals, and next steps?
24. What usually causes delays or missed follow-ups?
25. Are there parts of the process where responsibilities are unclear?

E. Motivation, Ownership, and Accountability

26. How clear are the expectations for response time, follow-up, and conversion?
27. How do you know whether you are performing well in sales-related tasks?
28. Do you receive feedback or coaching on how you handle inquiries?
29. What motivates you to follow up and move leads forward?
30. What makes it difficult to maintain urgency or consistency?
31. Are sales targets, responsibilities, or priorities clear to you?

F. Market, Client, and Offer Challenges

32. What reasons do clients usually give for not proceeding?
33. Do clients often mention price, schedule, requirements, location, delivery mode, or timing as concerns?
34. How often do clients compare the service with competitors?
35. Do you think the offer is easy for clients to understand? Why or why not?
36. Are the leads you receive usually qualified or ready to decide?
37. What do you think would make the service or offer easier to sell?

G. Support Needed

38. What would help you handle inquiries more effectively?
39. What training, coaching, job aid, template, or tool would be useful?
40. What process improvements would make your work easier?
41. What information do you wish was easier to access?
42. What would help improve client conversion from your perspective?

Notes and Evidence Summary

Use the space below to summarize important findings from the sales personnel interview.

Key Finding	Evidence or Example	Possible Gap Category	Follow-Up Needed

Initial Gap Indicators

After the interview, mark any gap categories that appear to be possible causes based on the sales personnel's responses.

Gap Category	Possible Indicator Present?	Notes
Knowledge Gap	Yes / No / Unsure	
Skill Gap	Yes / No / Unsure	
Process Gap	Yes / No / Unsure	
Motivation or Accountability Gap	Yes / No / Unsure	
Market or Offer Gap	Yes / No / Unsure	

Product / Service Knowledge Check

Purpose

The Product / Service Knowledge Check is used to determine whether sales personnel have the information needed to explain the service accurately, confidently, and consistently to potential clients. It helps identify whether sales performance issues may be caused by a knowledge gap related to the service, target market, client needs, inclusions, requirements, pricing, schedule, value proposition, or common client concerns.

This tool may be used as a written knowledge check, oral questioning guide, coaching activity, or self-assessment. The results should be compared with interview responses, sales conversation observations, and inquiry records to determine whether limited service knowledge is affecting client conversion.

Recommended Participants

This knowledge check may be completed by personnel who explain services, respond to client inquiries, prepare proposals, send follow-ups, or support the sales process.

Instructions

Select one product, service, or training program to assess. Ask the participant to answer the questions based on what they currently know, without relying on another person for help. Reference materials may be allowed if the purpose is to check whether personnel know where to find accurate information. However, if the purpose is to check recall and confidence, the knowledge check should be completed without references.

After completing the check, review the responses for accuracy, completeness, consistency, and confidence. Items with incomplete, inaccurate, or inconsistent responses may indicate a knowledge gap.

Product / Service Assessed

Item	**Response**
Product / Service / Program Name	
Participant Name	
Role / Position	
Date Completed	
Assessor / Reviewer	

Knowledge Check Questions

A. Basic Service Understanding

1. What is the service or program being offered?

2. What is the main purpose of this service or program?
3. Who is the intended target client or participant?
4. What problem, need, or requirement does this service help address?
5. Why would a client choose this service?

B. Service Details and Inclusions

6. What are the main inclusions of the service or program?
7. What is the duration or expected timeline?
8. What are the delivery options, if applicable?
9. What materials, documents, certificates, or outputs are included?
10. What are the client or participant requirements before availing of the service?
11. What important limitations or exclusions should clients understand?

C. Value Proposition

12. What makes this service valuable to the client?
13. What makes this service different from similar offers or competitors?
14. What benefits should be emphasized when speaking with a potential client?
15. How does this service help the client comply with requirements, solve a problem, improve performance, or reduce risk?
16. What would you say if a client asks, “Why should we choose this service?”

D. Client Needs and Fit

17. What type of client is the best fit for this service?
18. What type of client may not be the best fit?

19. What questions should be asked to determine whether the service matches the client’s need?
20. What client information should be gathered before recommending this service?
21. What signs indicate that the client is ready to proceed?

E. Pricing, Schedule, and Requirements

22. How should the price or package be explained to the client?
23. What common pricing concerns might clients raise?
24. What schedule-related questions are clients likely to ask?
25. What requirements should be confirmed before the client proceeds?
26. What details should be verified before sending a proposal or quotation?

F. Common Questions and Objections

27. What are the most common questions clients ask about this service?
28. What are the most common reasons clients hesitate or decline?
29. How would you respond if the client says the price is too high?
30. How would you respond if the client says they need to think about it?
31. How would you respond if the client says they are comparing with another provider?
32. How would you respond if the client asks for a discount?
33. How would you respond if the client asks why the service is necessary?

G. Next Steps and Follow-Up

34. What should be the next step after a client shows interest?
35. What information should be sent after the initial inquiry?
36. When should follow-up be done?

37. What should be documented after each client interaction?

38. What should be done if the client does not respond?

39. What should be done if the client declines?

Scoring Guide

Use the scoring guide below to evaluate each response.

Score	Description
3 - Strong	Response is accurate, complete, clear, and client-ready. The participant can explain the information confidently and connect it to client needs.
2 - Adequate	Response is mostly accurate but may need more detail, clearer wording, or stronger connection to client needs.
1 - Needs Improvement	Response is incomplete, unclear, inconsistent, or difficult to use in an actual client conversation.
0 - Not Demonstrated	Participant is unable to answer, gives incorrect information, or needs to rely completely on another person.

Results Summary

Knowledge Area	Score Range	Observed Strengths	Areas for Improvement
Basic Service Understanding	0-15		
Service Details and Inclusions	0-18		
Value Proposition	0-15		
Client Needs and Fit	0-15		
Pricing, Schedule, and Requirements	0-15		
Common Questions and Objections	0-21		
Next Steps and Follow-Up	0-18		

Knowledge Gap Indicator

Use the guide below to interpret the results.

Result	Interpretation	Possible Action
Mostly 3s	Knowledge is generally strong and client-ready.	Focus may shift to skill practice, process consistency, or accountability.
Mix of 2s and 3s	Knowledge is adequate but may need refinement.	Provide job aids, FAQs, service guides, or coaching on clearer explanation.
Many 1s or 2s	Knowledge gaps may be affecting sales performance.	Provide targeted product/service training and quick-reference materials.
Several 0s or 1s	Significant knowledge gap is likely present.	Prioritize structured product/service orientation before expecting improved sales conversion.

Reviewer Notes

Key Finding	Evidence or Example	Possible Impact on Sales Performance	Follow-Up Needed

Sales Conversation Observation Checklist

Purpose

The Sales Conversation Observation Checklist is used to assess how sales personnel handle actual or simulated client conversations. It helps determine whether sales performance issues are related to communication skills, questioning techniques, needs analysis, value explanation, objection handling, closing, follow-up, or use of the sales process.

This tool is especially useful for identifying skill gaps. It may also reveal knowledge gaps, process gaps, and accountability issues depending on how the conversation is handled and documented.

Recommended Use

This checklist may be used during:

- A live client inquiry, with proper permission and without disrupting the conversation

- A recorded sales call or message exchange, if available and appropriate
- A simulated client conversation or role-play activity
- A coaching session where the participant practices handling common client scenarios

Instructions

Observe one sales conversation from beginning to end. The observer should focus on what the sales personnel actually does or says, not only on what they claim to know. Rate each behavior using the scale provided.

If the conversation is simulated, use a realistic client scenario based on actual inquiries, common objections, and typical decision factors. After the observation, summarize the strengths, improvement areas, and possible gap categories.

Observation Details

Item	Response
Participant Name	
Role / Position	
Observer	
Date of Observation	
Type of Conversation	Live / Recorded / Simulated / Role-play
Product / Service Discussed	
Client Scenario or Inquiry Type	

Rating Scale

Rating	Description
3 - Strong	Behavior was performed clearly, confidently, and effectively.
2 - Adequate	Behavior was performed but may need improvement in clarity, confidence, consistency, or timing.
1 - Needs Improvement	Behavior was attempted but was incomplete, unclear, hesitant, or ineffective.

0 - Not Demonstrated	Behavior was not observed or was not performed when needed.
N/A	Behavior was not applicable to the observed conversation.

Observation Checklist

A. Opening and Professionalism

Behavior	Rating	Notes / Evidence
Greeted or responded to the client professionally		
Introduced self or organization clearly, if applicable		
Acknowledged the client's inquiry or concern		
Used a polite, respectful, and client-centered tone		
Created a positive first impression		

B. Needs Analysis and Questioning

Behavior	Rating	Notes / Evidence
Asked questions to understand the client's need, goal, or situation		
Clarified the type of service, program, or solution the client was looking for		
Asked about the client's timeline, urgency, or target schedule		
Asked about the client's organization, participants, location, or requirements, if relevant		
Avoided immediately pitching without first understanding the client's need		

C. Product / Service Explanation

Behavior	Rating	Notes / Evidence
Explained the service or program accurately		
Communicated the key inclusions, requirements, schedule, or process clearly		

Used client-friendly language instead of overly technical or confusing terms		
Provided enough information for the client to understand the offer		
Avoided giving incomplete, inconsistent, or uncertain information		

D. Value Communication

Behavior	**Rating**	**Notes / Evidence**
Connected the service to the client's need or problem		
Explained the benefits or value of the service clearly		
Highlighted why the service is relevant, useful, or necessary for the client		
Differentiated the service from generic or competitor options, if applicable		
Made the offer sound practical and worth considering		

E. Objection Handling

Behavior	**Rating**	**Notes / Evidence**
Listened to the client's concern before responding		
Responded appropriately to price-related concerns		
Responded appropriately to schedule, requirement, or availability concerns		
Addressed hesitation without sounding dismissive or defensive		
Reframed the concern by connecting back to value, need, or next steps		

F. Closing and Next Steps

Behavior	**Rating**	**Notes / Evidence**
Confirmed the client's level of interest or decision status		

Clearly explained the next step		
Asked for needed information to move the inquiry forward		
Set a follow-up action, timeline, or commitment		
Ended the conversation professionally		

G. Documentation and Process Use

Behavior	**Rating**	**Notes / Evidence**
Recorded important client details accurately		
Documented the inquiry status or next step		
Used the required tracker, template, CRM, or documentation tool, if applicable		
Followed the expected inquiry handling process		
Identified whether the lead should be followed up, escalated, or closed		

Results Summary

Observation Area	**Total Score**	**Strengths Observed**	**Improvement Areas**
Opening and Professionalism			
Needs Analysis and Questioning			
Product / Service Explanation			
Value Communication			
Objection Handling			
Closing and Next Steps			
Documentation and Process Use			

Interpretation Guide

Pattern Observed	**Possible Gap Category**	**Possible Action**

Participant could not explain the service accurately or confidently	Knowledge Gap	Provide product/service training, FAQs, service guide, or quick-reference job aid
Participant knew the service but struggled to ask questions, explain value, or handle objections	Skill Gap	Provide role-play, coaching, conversation simulation, or guided practice
Participant handled the conversation well but missed documentation, tracking, or follow-up steps	Process Gap	Provide process map, checklist, tracker, template, or workflow clarification
Participant knew the next step but did not commit to follow-up or update records	Motivation or Accountability Gap	Clarify expectations, assign lead ownership, and create performance check-ins
Participant followed the process but the client was not a good fit or rejected the offer due to price, timing, or competing options	Market or Offer Gap	Review lead qualification, offer positioning, pricing, scheduling, or marketing message

Observer Notes

Key Finding	**Evidence or Example**	**Possible Gap Category**	**Recommended Follow-Up**

Sales Process Review Checklist

Purpose

The Sales Process Review Checklist is used to examine whether the current sales workflow supports consistent inquiry handling, lead tracking, proposal preparation, follow-up, documentation, and conversion. It helps identify whether sales performance issues are caused by unclear steps, missing tools, inconsistent practices, unclear ownership, or weak process controls.

This tool is especially useful for identifying process gaps. It may also reveal accountability issues when expected actions are known but not consistently completed or monitored.

Recommended Use

Use this checklist to review the current sales process, tools, documents, and actual workflow. This may be done through document review, system review, interviews, process walkthroughs, or observation of how inquiries move from first contact to confirmed booking, enrollment, or closure.

Recommended Participants

This review may involve:

- Sales personnel
- Sales lead or supervisor
- Training coordinator
- Program coordinator
- Administrative staff handling inquiries
- Manager or decision-maker involved in sales process oversight

Instructions

Review each part of the sales process and mark whether the item is present, partially present, absent, or not applicable. Add notes or evidence to explain the rating. The reviewer should look for actual evidence such as templates, trackers, message records, follow-up logs, process documents, proposal files, or examples of handled inquiries.

Rating Scale

Rating	Description
Present	The process element exists, is clear, and is being used consistently.
Partially Present	The process element exists but is incomplete, unclear, outdated, informal, or inconsistently used.

Absent	The process element does not exist or is not being used.
N/A	The process element is not applicable to the current sales context.

Review Details

Item	Response
Process / Service Reviewed	
Reviewer	
Date Reviewed	
Departments / Roles Involved	
Evidence Sources Reviewed	

A. Inquiry Receipt and Lead Capture

Process Element	Rating	Notes / Evidence
There is a clear list of channels where inquiries are received, such as Facebook, website, email, phone, walk-in, referrals, or partners		
There is a standard way to record new inquiries		
Required client details are clearly defined		
The team knows who is responsible for receiving and recording inquiries		
Inquiries are captured in a shared tracker, CRM, spreadsheet, or similar system		
Duplicate, incomplete, or unqualified inquiries are managed consistently		

B. Lead Assignment and Ownership

Process Element	Rating	Notes / Evidence
Each lead is assigned to a specific person or role		
Lead ownership is clear from the beginning of the process		

The assigned person knows what actions they are responsible for		
There is a process for reassigning leads when needed		
There is a way to identify unattended or unassigned leads		

C. Inquiry Response Standards

Process Element	**Rating**	**Notes / Evidence**
There is a defined expected response time for new inquiries		
There are standard response templates for common inquiries		
Responses include the essential information clients need to decide or proceed		
Responses are personalized based on the client's need or inquiry type		
There is a standard way to handle incomplete client information		
The quality of inquiry responses is reviewed or monitored		

D. Client Needs Assessment

Process Element	**Rating**	**Notes / Evidence**
There is a standard set of questions used to understand client needs		
The process includes confirming client type, number of participants, target schedule, location, requirements, and purpose		
Sales personnel are guided to identify whether the client is a good fit for the service		
Client needs are documented before recommending a service or sending a proposal		
There is a clear process for handling clients who are not yet ready to decide		

E. Proposal, Quotation, and Offer Preparation

Process Element	Rating	Notes / Evidence
There is a standard proposal or quotation template		
Pricing, inclusions, exclusions, and terms are clearly documented		
Proposals are reviewed or approved before sending, if required		
Proposal preparation responsibilities are clear		
Proposal turnaround time is defined or monitored		
Sent proposals are tracked with date, recipient, amount, status, and next step		

F. Follow-Up Process

Process Element	Rating	Notes / Evidence
There is a standard follow-up timeline after an inquiry or proposal		
Follow-up responsibility is clearly assigned		
Follow-up messages or call templates are available		
Follow-up attempts are documented		
There is a reminder system for pending leads		
There is a process for escalating high-value or urgent leads		
There is a process for closing leads that no longer respond		

G. Booking, Enrollment, or Confirmation Handoff

Process Element	Rating	Notes / Evidence
There is a clear handoff process once the client confirms		
Required client details are transferred accurately to the appropriate team		
Payment, registration, contract, or confirmation requirements are clearly communicated		

The client receives a clear confirmation message with next steps		
Internal teams are notified when a lead becomes a confirmed booking or enrollment		
Handoff issues, delays, or missing information are tracked and addressed		

H. Lost Lead and Declined Inquiry Review

Process Element	**Rating**	**Notes / Evidence**
Lost or declined leads are documented		
Reasons for lost leads are categorized consistently		
Common reasons for non-conversion are reviewed periodically		
Lost lead data is used to improve messaging, process, offer, or follow-up		
There is a process for re-engaging leads in the future, if applicable		

I. Sales Tools and Support Materials

Process Element	**Rating**	**Notes / Evidence**
Sales personnel have access to updated service information		
FAQs or quick-reference guides are available		
Message templates, proposal templates, and follow-up templates are available		
Sales scripts or conversation guides are available, if needed		
Marketing materials clearly explain the service value and target audience		
Tools are easy to access, updated, and consistently used		

J. Monitoring and Accountability

Process Element	**Rating**	**Notes / Evidence**

Sales activity is regularly reviewed		
Response time, follow-up completion, proposal status, and conversion are monitored		
There is a regular check-in or reporting routine		
Sales personnel receive feedback on inquiry handling and follow-up		
Performance expectations are clear and measurable		
There is visible ownership of sales outcomes and next steps		

Results Summary

Process Area	Overall Rating	Key Strengths	Process Gaps or Risks
Inquiry Receipt and Lead Capture			
Lead Assignment and Ownership			
Inquiry Response Standards			
Client Needs Assessment			
Proposal, Quotation, and Offer Preparation			
Follow-Up Process			
Booking, Enrollment, or Confirmation Handoff			
Lost Lead and Declined Inquiry Review			
Sales Tools and Support Materials			
Monitoring and Accountability			

Interpretation Guide

Pattern Observed	Possible Gap Category	Possible Action
Process steps are missing, unclear, or undocumented	Process Gap	Create a sales process map, SOP, checklist, or workflow guide

Tools exist but are outdated, incomplete, or difficult to access	Process Gap / Knowledge Gap	Update templates, FAQs, service guides, and shared references
Leads are not assigned or tracked clearly	Process Gap / Accountability Gap	Define lead ownership and use a shared lead tracker
Follow-ups are missed or inconsistently documented	Process Gap / Accountability Gap	Create follow-up standards, reminders, and monitoring routines
Proposals are delayed or inconsistent	Process Gap	Standardize proposal templates, approval steps, and turnaround expectations
Lost leads are not reviewed	Process Gap / Market or Offer Gap	Create lost lead categories and review patterns regularly
Process exists but is not followed consistently	Accountability Gap	Clarify expectations, monitor performance, and conduct regular check-ins

Reviewer Notes

Key Finding	Evidence or Example	Possible Gap Category	Recommended Follow-Up

Lead and Lost Inquiry Review Template

Purpose

The Lead and Lost Inquiry Review Template is used to analyze inquiries that did not convert into confirmed bookings, enrollments, or paying clients. It helps identify patterns in lost or inactive leads and determines whether non-conversion may be related to process gaps, follow-up issues, accountability gaps, lead quality, pricing concerns, timing, client fit, or offer positioning.

This tool helps move the analysis beyond opinion by reviewing actual inquiry records and sales outcomes. It supports a more evidence-based understanding of why potential clients do not proceed.

Recommended Use

Use this template to review a sample of recent inquiries, especially those that did not convert. The review may include inquiries from different channels such as Facebook, website, email, phone, referrals, walk-ins, or partner sources.

This template may be used for:

- Lost leads
- Inactive leads
- Unconverted inquiries
- Proposals sent but not approved
- Clients who stopped responding
- Clients who declined due to price, schedule, requirements, or other reasons

Recommended Sample Size

If many inquiry records are available, review a sample of at least 10 to 20 lost or unconverted leads. If fewer records are available, review all available lost inquiries within the selected period.

Review Details

Item	Response
Review Period	
Product / Service / Program Reviewed	
Reviewer	
Date Reviewed	
Inquiry Sources Included	

Number of Leads Reviewed	

Individual Lead Review

Use one row for each inquiry or lead reviewed.

Lead ID / Reference	Inquiry Date	Inquiry Source	Product / Service Interest	Client Type	Assigned Person	First Response Date / Time	Proposal Sent?	Last Follow-Up Date	Current Status	Reason for non-conversion	Evidence / Notes
							Yes / No				
							Yes / No				
							Yes / No				
							Yes / No				
							Yes / No				

Reason for Non-Conversion Categories

Use the categories below to classify why the lead did not convert. Select the main reason based on available evidence. If the reason is unclear, mark it as “Unknown” and note what information is missing.

Category	Description	Possible Gap Category
No Follow-Up Documented	There is no evidence that follow-up was completed after the inquiry or proposal	Process / Accountability
Delayed Follow-Up	Follow-up was completed, but later than expected or after the client had likely lost interest	Process / Accountability
Client Stopped Responding	Client did not respond after one or more follow-up attempts	Market/Offer / Process
Price Concern	Client mentioned that the price was too high or outside budget	Market/Offer
Schedule Mismatch	Client could not proceed due to date, time, location, or availability concerns	Market/Offer
Chose Competitor	Client selected another provider	Market/Offer
Not Qualified / Poor Fit	Lead did not match the target client, need, budget, authority, or readiness	Market/Offer

Unclear Value	Client did not appear to understand the value, relevance, or urgency of the service	Knowledge / Skill / Market/Offer
Missing Requirements	Client could not proceed due to missing documents, prerequisites, approval, or internal requirements	Market/Offer / Process
Proposal Not Sent	Proposal or quotation was requested but not sent, delayed, or incomplete	Process / Accountability
Decision Pending	Client was interested but still waiting for approval, budget, schedule, or internal decision	Market/Offer
Unknown	Reason for non-conversion was not documented or cannot be determined	Process

Lost Lead Pattern Summary

After reviewing individual leads, summarize the common patterns observed.

Pattern Observed	Number of Leads Affected	Evidence / Example	Possible Gap Category	Recommended Follow-Up
No follow-up documented			Process / Accountability	
Delayed follow-up			Process / Accountability	
Price concern			Market/Offer	
Schedule mismatch			Market/Offer	
Chose competitor			Market/Offer	
Client stopped responding			Market/Offer / Process	
Not qualified or poor fit			Market/Offer	
Unclear value			Knowledge / Skill / Market/Offer	
Proposal issue			Process / Accountability	

Unknown or undocumented reason			Process	

Follow-Up Quality Review

Use this section to check whether follow-up actions were completed consistently.

Follow-Up Item	Yes	No	N/A	Notes / Evidence
First response was sent within expected response time				
Client need was clarified before recommendation or proposal				
Proposal or quotation was sent when needed				
Follow-up was completed after proposal or inquiry				
More than one follow-up attempt was made when appropriate				
Follow-up date and outcome were documented				
Reason for non-conversion was documented				
Lead was properly closed, parked, or scheduled for future follow-up				

Interpretation Guide

Pattern Observed	Possible Meaning	Possible Action
Many leads have no documented follow-up	Follow-up process or accountability system may be weak	Create follow-up standards, tracker, reminders, and ownership assignments
Many leads are lost due to price	The issue may involve pricing, perceived value, or client budget fit	Review pricing explanation, value messaging, lead qualification, or offer packaging
Many leads are lost due to schedule mismatch	The offer may not match client timing or availability	Review scheduling options, delivery modes, and alternative service dates

Many leads stop responding after proposal	Proposal follow-up may be weak, or the proposal may not communicate enough value	Review proposal quality, follow-up process, and value messaging
Many leads are not qualified	Marketing or inquiry sources may be attracting poor-fit leads	Improve lead qualification criteria and marketing message
Many lost reasons are unknown	Documentation process may be weak	Create required lost lead categories and review routines
Client interest is high but conversion remains low	There may be issues in follow-up, offer positioning, urgency, or closing	Review conversation quality, proposal timing, and closing practices

Reviewer Notes

Key Finding	Evidence or Example	Possible Gap Category	Recommended Follow-Up

Gap Classification Matrix

Purpose

The Gap Classification Matrix is used to organize and classify findings collected from the diagnostic tools. It helps determine whether each sales performance issue is most likely caused by a knowledge gap, skill gap, process gap, motivation or accountability gap, or market and offer-related gap.

This matrix should be completed after reviewing evidence from stakeholder interviews, sales personnel interviews, product or service knowledge checks, sales conversation observations, sales process reviews, lead and lost inquiry reviews, and existing sales materials.

The goal is to identify patterns across multiple sources of evidence and determine which type of intervention is most appropriate.

Instructions

Review all findings gathered from the diagnostic tools. For each finding, identify the evidence source, describe the issue, classify the likely gap category, and determine whether training is likely to solve the issue by itself.

Use specific evidence whenever possible. Avoid writing general statements such as "sales team needs improvement." Instead, describe what was observed, reported, or documented.

For example:

- "Three out of five reviewed leads had no documented follow-up after proposal."
- "Sales personnel could explain the program duration but struggled to explain the value of the program to the client."
- "Stakeholders reported inconsistent use of the lead tracker."
- "Clients frequently mentioned price concerns but the value proposition was not clearly explained before pricing was discussed."

Gap Classification Matrix Template

Finding / Observed Issue	Evidence Source	Evidence or Example	Likely Gap Category	Can Training Alone Solve This?	Recommended Direction
			Knowledge / Skill / Process / Accountability / Market-Offer	Yes / No / Partially	
			Knowledge / Skill / Process / Accountability / Market-Offer	Yes / No / Partially	
			Knowledge / Skill / Process / Accountability / Market-Offer	Yes / No / Partially	

			Knowledge / Skill / Process / Accountability / Market-Offer	Yes / No / Partially	
			Knowledge / Skill / Process / Accountability / Market-Offer	Yes / No / Partially	

Classification Guide

Use the guide below to help classify each finding.

Finding Pattern	**Likely Gap Category**	**Training Alone?**	**Recommended Direction**
Sales personnel cannot accurately explain the service, inclusions, requirements, pricing, or value	Knowledge Gap	Yes, if the main issue is missing or incorrect information	Product/service training, FAQs, quick-reference guide, service knowledge job aid
Sales personnel know the service but struggle to ask questions, explain value, handle objections, or guide the client to the next step	Skill Gap	Partially; practice and feedback are needed	Role-play, coaching, conversation simulation, objection-handling practice
The process for receiving, assigning, tracking, following up, or closing leads is unclear or inconsistent	Process Gap	No	Process map, SOP, tracker, templates, workflow clarification
Personnel know what to do but do not consistently follow up, document, update, or take ownership	Motivation or Accountability Gap	No, or only partially	Lead ownership, performance check-ins, dashboards, feedback routines, accountability system
Clients frequently decline because of price, timing, competitor comparison, poor fit, or low perceived value	Market or Offer Gap	No, or only partially	Offer positioning, lead qualification, pricing/package review, improved marketing message

Lost inquiry reasons are undocumented or unknown	Process Gap	No	Create lost lead categories, documentation standards, and review routines
Proposals are sent but clients do not respond afterward	Process / Skill / Market-Offer Gap	Partially	Review proposal quality, follow-up process, value messaging, and objection handling
Team members explain the same service differently	Knowledge / Process Gap	Partially	Standardize service information, create reference materials, align messaging
Follow-up depends on individual initiative instead of a shared system	Process / Accountability Gap	No	Create follow-up standards, tracker, reminders, and ownership assignments
Leads are frequently not qualified or not ready to decide	Market or Offer Gap	No	Improve lead qualification, target audience clarity, and marketing alignment

Evidence Strength Rating

Use this optional rating to show how strong the evidence is for each classified gap.

Rating	Description
Strong Evidence	The finding appears across multiple data sources or is supported by clear records, observations, or repeated examples.
Moderate Evidence	The finding appears in at least one reliable data source but needs more confirmation.
Limited Evidence	The finding is based on one comment, one example, or incomplete information. Further validation is needed.

Gap Summary

After classifying individual findings, summarize the number or weight of findings under each gap category.

Gap Category	Number of Findings	Evidence Strength	Summary of Key Issues
Knowledge Gap		Strong / Moderate / Limited	

Skill Gap		Strong / Moderate / Limited	
Process Gap		Strong / Moderate / Limited	
Motivation or Accountability Gap		Strong / Moderate / Limited	
Market or Offer Gap		Strong / Moderate / Limited	

Preliminary Diagnosis

Use the space below to summarize the most likely root causes of the sales performance issue based on the classified findings.

Primary Gap Category	Supporting Evidence	Why This Matters	Initial Recommendation

Diagnostic Conclusion

Based on the evidence reviewed, the sales performance issue appears to be primarily related to:

Gap Category	Mark if Applicable	Notes
Knowledge Gap		
Skill Gap		
Process Gap		
Motivation or Accountability Gap		
Market or Offer Gap		

The findings suggest that the recommended intervention should include:

Intervention Type	Mark if Needed	Notes

Training		
Coaching or practice		
Job aid or reference tool		
Process improvement		
Sales tracker or template		
Accountability or monitoring system		
Offer, pricing, or messaging review		

Findings Summary Template

Purpose

The Findings Summary Template is used to summarize the most important results from the diagnostic process. It provides a clear overview of the sales performance issue, the evidence collected, the major gap categories identified, and the likely root causes affecting performance.

This section helps communicate the diagnostic findings in a way that is easy for stakeholders to understand. It may also be used as part of a project report, stakeholder presentation, or portfolio case study.

Instructions

Complete this section after reviewing the completed diagnostic tools and Gap Classification Matrix. Focus on the most important patterns, not every individual detail. The summary should explain what was found, what evidence supports the finding, and why it matters to sales performance.

Use clear and specific language. Avoid vague statements such as “sales needs improvement.” Instead, describe the actual issue, such as “follow-up actions were not consistently documented after proposals were sent.”

A. Project and Review Details

Item	Response

Project / Service Reviewed	
Review Period	
Diagnostic Tools Used	Stakeholder Interview / Sales Personnel Interview / Knowledge Check / Conversation Observation / Process Review / Lost Inquiry Review / Materials Review
Participants or Data Sources Included	
Date of Summary	
Prepared By	

B. Sales Performance Issue

Briefly describe the sales performance concern being investigated.

Question	**Response**
What sales issue was reviewed?	
What outcome needs to improve?	
Who or what is affected?	
Why does this issue matter to the business?	

C. Key Findings Summary

List the most important findings from the diagnostic process.

Key Finding	**Supporting Evidence**	**Gap Category**	**Impact on Sales Performance**
		Knowledge / Skill / Process / Accountability / Market-Offer	
		Knowledge / Skill / Process / Accountability / Market-Offer	
		Knowledge / Skill / Process / Accountability / Market-Offer	
		Knowledge / Skill / Process / Accountability / Market-Offer	

		Knowledge / Skill / Process / Accountability / Market-Offer	

D. Gap Category Summary

Summarize which gap categories appear to be contributing to the sales performance issue.

Gap Category	**Level of Concern**	**Evidence Summary**	**Notes**
Knowledge Gap	High / Moderate / Low / Not Evident		
Skill Gap	High / Moderate / Low / Not Evident		
Process Gap	High / Moderate / Low / Not Evident		
Motivation or Accountability Gap	High / Moderate / Low / Not Evident		
Market or Offer Gap	High / Moderate / Low / Not Evident		

E. Primary Root Cause Statement

Use this section to summarize the most likely root cause or combination of root causes.

Based on the evidence collected, the sales performance issue appears to be primarily caused by:

____

____

____

The strongest evidence supporting this diagnosis includes:

1. ______________________________
2. ______________________________

3. ____

F. What This Means

Explain the implication of the findings in simple terms.

Diagnostic Question	Summary Response
Is this mainly a training problem?	Yes / No / Partially
What parts may require training or learning support?	
What parts require non-training solutions?	
What risks may continue if the issue is not addressed?	
What should be prioritized first?	

G. Summary Statement

Use the space below to write a short summary that can be shared with stakeholders.

The diagnostic findings suggest that:

____

____

____

Therefore, the recommended next step is to:

____

____

____

Solution Mapping Template

Purpose

The Solution Mapping Template is used to translate diagnostic findings into appropriate learning and performance interventions. It helps ensure that each recommended solution is directly connected to an identified gap, supported by evidence, and aligned with the desired sales outcome.

This template should be completed after the findings have been summarized and the primary gap categories have been identified. The goal is to avoid recommending a training course as the default solution when the evidence shows that other interventions may also be needed.

Instructions

Review the Findings Summary and Gap Classification Matrix before completing this template. For each key finding, identify the related gap category, desired performance outcome, recommended intervention, responsible owner, and success measure.

When recommending solutions, consider whether the issue can be solved through training alone or whether it requires a combination of learning support, process improvement, tools, coaching, accountability, or business-level action.

Solution Mapping Table

Key Finding / Gap	**Evidence Summary**	**Gap Category**	**Desired Performance Outcome**	**Recommended Intervention**	**Owner / Responsible Role**	**Success Measure**
		Knowledge / Skill / Process / Accountability / Market-Offer				
		Knowledge / Skill / Process / Accountability / Market-Offer				
		Knowledge / Skill / Process /				

		Accountability / Market-Offer				
		Knowledge / Skill / Process / Accountability / Market-Offer				
		Knowledge / Skill / Process / Accountability / Market-Offer				

Intervention Selection Guide

Use the guide below to match each gap category with appropriate solution options.

Gap Category	**When This Is the Issue**	**Recommended Intervention Options**
Knowledge Gap	Sales personnel lack accurate or complete information about the service, client needs, inclusions, requirements, pricing, or value proposition	Product/service training, service guide, FAQs, quick-reference job aid, comparison sheet, standard messaging guide
Skill Gap	Sales personnel know the information but struggle to apply it during conversations, questioning, value explanation, objection handling, closing, or follow-up	Role-play, coaching, conversation simulation, objection-handling practice, guided sales practice, feedback sessions
Process Gap	The sales workflow is unclear, inconsistent, missing, or difficult to follow	Sales process map, SOP, inquiry handling checklist, lead tracker, proposal template, follow-up template, lost lead documentation process
Motivation or Accountability Gap	Personnel know what to do but do not consistently complete expected actions such as follow-	Clear expectations, lead ownership assignment, KPI dashboard, regular check-ins,

	up, documentation, lead updates, or next-step confirmation	performance feedback, accountability routines
Market or Offer Gap	Clients do not proceed because of price, timing, competitor comparison, poor fit, unclear value, or offer misalignment	Offer repositioning, pricing/package review, lead qualification criteria, improved marketing message, client segmentation, competitor review

Training Decision Check

Use this section to determine whether training should be included in the solution.

Question	Yes / No / Partially	Notes
Is the issue caused by missing or incorrect knowledge?		
Is the issue caused by weak application of skills during client conversations?		
Can the desired behavior be practiced and improved through training or coaching?		
Are there clear performance expectations after training?		
Are tools, processes, and management support available to reinforce the training?		
Will training alone solve the issue?		

Recommended Solution Package

Use this section to define the final recommended combination of interventions.

Intervention Type	Include?	Description / Purpose	Priority
Training Module	Yes / No		High / Medium / Low
Coaching or Role-Play	Yes / No		High / Medium / Low
Sales Playbook or Job Aid	Yes / No		High / Medium / Low
Process Map or SOP	Yes / No		High / Medium / Low
Lead Tracker or Follow-Up Tool	Yes / No		High / Medium / Low

Message / Proposal Templates	Yes / No		High / Medium / Low
Accountability or KPI Dashboard	Yes / No		High / Medium / Low
Offer, Pricing, or Marketing Review	Yes / No		High / Medium / Low

Implementation Priority

Use this section to decide which solutions should be addressed first.

Priority Level	Recommended Action	Reason for Priority	Target Timeline
Immediate			
Short-Term			
Medium-Term			
Long-Term			

Success Measures

Identify how improvement will be measured after the solution is implemented.

Desired Outcome	Success Measure / KPI	Data Source	Review Frequency
Faster inquiry response	Response time for new inquiries	Lead tracker / message records	Daily / Weekly / Monthly
More consistent follow-up	Percentage of leads with documented follow-up	Lead tracker	Weekly / Monthly
Better proposal conversion	Percentage of proposals converted to confirmed bookings	Proposal tracker / sales records	Monthly
Improved conversation quality	Observation or coaching checklist scores	Sales observation checklist	Monthly / Quarterly
Better lead documentation	Percentage of leads with complete status and lost reason	Lead tracker	Weekly / Monthly

Higher conversion rate	Inquiry-to-booking or inquiry-to-enrollment conversion rate	Sales records	Monthly / Quarterly

Final Recommendation Statement

Use the space below to summarize the recommended solution in paragraph form.

Based on the diagnostic findings, the recommended solution is to:

____

____

____

This recommendation is appropriate because:

____

____

____

The expected performance improvement is:

____

____

____

Implementation and Evaluation Plan

Purpose

The Implementation and Evaluation Plan is used to outline how the recommended solution will be introduced, supported, monitored, and evaluated. It helps ensure that the selected interventions are not only designed properly but also applied in a way that can improve actual sales performance.

This section should be completed after the diagnostic findings have been summarized and the recommended solution package has been identified.

Instructions

Use this template to plan how the recommended interventions will be implemented. Identify the action steps, responsible persons, timeline, support needed, and success measures. The plan should focus on practical implementation and measurable performance improvement.

Implementation Plan

Recommended Intervention	**Key Actions Needed**	**Responsible Person / Role**	**Support or Resources Needed**	**Target Timeline**	**Status**
Training module					Not Started / In Progress / Done
Coaching or role-play					Not Started / In Progress / Done
Sales playbook or job aid					Not Started / In Progress / Done
Sales process map or SOP					Not Started / In Progress / Done
Lead tracker or follow-up tool					Not Started / In Progress / Done
Message, proposal, or					Not Started / In

follow-up templates					Progress / Done
Accountability or KPI dashboard					Not Started / In Progress / Done
Offer, pricing, or marketing review					Not Started / In Progress / Done

Rollout Plan

Rollout Step	Description	Owner	Target Date	Notes
Prepare materials	Finalize training content, job aids, templates, trackers, or process documents			
Brief stakeholders	Present diagnostic findings, recommended solution, and implementation expectations			
Orient sales personnel	Explain new tools, process expectations, and success measures			
Conduct practice or coaching	Provide role-play, scenario practice, or guided feedback if skill gaps were identified			
Launch process or tool changes	Begin using updated trackers, templates, SOPs, or follow-up routines			
Monitor early use	Check whether the team is using the tools and following the process correctly			
Review performance data	Compare sales activity and conversion indicators before and after implementation			
Adjust solution	Revise training, tools, process, or messaging based on results and feedback			

Evaluation Questions

Use the questions below to evaluate whether the solution is working.

Evaluation Question	Data Source	Review Schedule	Notes
Are inquiries being responded to within the expected timeframe?	Lead tracker / message records	Weekly / Monthly	
Are leads being assigned and tracked clearly?	Lead tracker	Weekly / Monthly	
Are follow-ups being completed and documented?	Follow-up tracker / sales records	Weekly / Monthly	
Are proposals being sent on time and followed up?	Proposal tracker	Weekly / Monthly	
Are sales personnel explaining the service more clearly and consistently?	Observation checklist / coaching notes	Monthly / Quarterly	
Are client objections being handled more effectively?	Observation checklist / role-play results	Monthly / Quarterly	
Are lost lead reasons being documented and reviewed?	Lost inquiry review	Monthly / Quarterly	
Is the inquiry-to-booking or inquiry-to-enrollment conversion rate improving?	Sales records	Monthly / Quarterly	

Success Measures

Performance Area	Baseline Result	Target Result	Actual Result	Data Source
Inquiry response time				
Follow-up completion rate				
Proposal turnaround time				
Proposal conversion rate				
Inquiry-to-booking conversion rate				
Lead documentation completeness				

Sales conversation observation score				
Lost reason documentation rate				

Evaluation Levels

Use the guide below to evaluate both learning and performance results.

Evaluation Level	What to Check	Example Evidence
Reaction	Did participants find the training, tool, or process useful?	Feedback forms, short surveys, informal feedback
Learning	Did participants improve knowledge or skill?	Knowledge check scores, role-play results, coaching notes
Behavior	Are participants applying the expected behavior on the job?	Observation checklist, tracker usage, documented follow-ups
Results	Did sales performance improve?	Conversion rate, response time, proposal rate, confirmed bookings

Review and Adjustment Plan

Review Point	What to Review	Decision to Make	Action Needed
After first week	Early use of tools, trackers, templates, or process changes	Are users able to follow the process?	
After first month	Follow-up completion, documentation quality, and inquiry handling	Are behaviors improving?	
After three months	Conversion indicators and lost lead patterns	Is sales performance improving?	
After six months	Sustainability of process and performance improvements	Should the solution be continued, revised, or scaled?	

Final Evaluation Summary

Use this section after implementation to summarize the results.

Question	Summary Response
What interventions were implemented?	
What changed in sales behavior or process?	
What improved based on available data?	
What did not improve as expected?	
What should be adjusted or continued?	
What is the recommended next step?	