Sales Performance Diagnostic Toolkit

A Performance Analysis Tool for Sales Enablement

Why This Toolkit Was Created

I created this toolkit to identify the root causes of inconsistent sales conversion before recommending a learning or performance solution.

Instead of assuming that low conversion can be solved through training alone, the toolkit examines the issue through five possible gap areas: knowledge, skill, process, accountability, and market/offer fit.

CORE PRINCIPLE

Training should not be the automatic answer

What This Toolkit Helps Answer

- What is actually causing the sales performance issue?
- Is the issue related to knowledge, skill, process, accountability, or offer fit?
- What evidence supports the diagnosis?
- Can training solve the problem, or are other performance supports needed?
- What solution should be recommended based on the findings?

2. Diagnostic Framework

This framework is used to identify the most likely cause of a sales performance issue before deciding on a solution.

Gap Type	Core Question	Example Indicator	Possible Solution
Knowledge Gap	Do they know what they need to know?	Incomplete or inconsistent service explanation	Training, FAQs, service guides, job aids
Skill Gap	Can they apply it in conversation?	Weak questioning, objection handling, or closing	Role-play, coaching, simulations
Process Gap	Is there a clear workflow?	Missed follow-ups or unclear lead status	SOPs, templates, tracker
Accountability Gap	Are actions done consistently?	Known actions are not completed or documented	Lead ownership, check-ins, dashboard
Market/Offer Gap	Is the offer aligned with the client?	Price, timing, fit, or competitor concerns	Offer review, lead qualification, messaging

How the Framework Is Used

Findings from interviews, observations, sales records, and lost inquiry reviews are classified under the gap category that best explains the root cause.

Finding	Possible Gap Category
Sales personnel cannot clearly explain the program benefits.	Knowledge / Skill
Leads are not followed up after proposals are sent.	Process / Accountability
Clients frequently decline because of price concerns.	Market / Offer
Lost inquiry reasons are not documented.	Process
Sales personnel know the service but struggle with objections.	Skill

3. Data Collection Approach

The diagnostic process collects evidence from multiple sources to avoid relying only on assumptions or one person's opinion.

Evidence Source	What It Reveals
Stakeholder Interviews	Business goals, expected outcomes, sales concerns, previous actions taken, and success measures.
Sales Personnel Interviews	Frontline challenges, confidence, tools used, support needs, and barriers during inquiry handling.
Product / Service Knowledge Check	Understanding of service details, requirements, pricing, value proposition, and client fit.
Sales Conversation Observation	Questioning, value explanation, objection handling, next-step confirmation, and documentation.
Sales Process Review	Workflow for lead capture, assignment, response, proposal preparation, follow-up, and handoff.
Lead and Lost Inquiry Review	Reasons inquiries do not convert, including follow-up issues, price concerns, schedule mismatch, or undocumented lost reasons.
Existing Sales Materials Review	Whether scripts, brochures, proposals, FAQs, and templates support clear client communication.

Why Multiple Sources Matter

Using multiple sources helps compare:

- What stakeholders expect
- What sales personnel experience
- What the process actually supports
- What sales records reveal
- What lost inquiries show

Diagnostic Flow

4. Sample Tool Preview

The toolkit includes practical tools that help gather evidence, analyze performance, and identify root causes.

SAMPLE INTERVIEW QUESTIONS

A. Stakeholder Interview Questions

- What specific sales outcome do you want to improve?
- Which part of the sales process seems to have the most difficulty?
- What indicators should improve if the solution is successful?

B. Sales Personnel Interview Questions

- What client questions are hardest to answer?
- What objections or concerns do clients commonly raise?
- What usually causes delays or missed follow-ups?

SAMPLE SALES CONVERSATION OBSERVATION ITEMS

Observation Area	Sample Behavior
Needs Analysis	Asks questions to understand the client's need and situation
Service Explanation	Explains the service accurately and clearly
Value Communication	Connects the service to the client's problem or goal
Objection Handling	Responds effectively to price, timing, fit, or competition concerns
Closing and Next Steps	Confirms the next step and agreed follow-up action
Documentation	Records inquiry status and next steps accurately

SAMPLE LOST INQUIRY REVIEW CATEGORIES

- No follow-up documented
- Delayed follow-up
- Price concern
- Schedule mismatch
- Proposal not sent
- Unknown reason

These tools help collect the right evidence from the right sources so the root cause can be identified with clarity and confidence.

5. From Diagnosis to Solution

The toolkit does not stop at collecting information. It helps translate findings into practical learning and performance interventions.

1. **Evidence**
2. **Gap Category**
3. **Recommended Intervention**
4. **Success Measure**

SAMPLE SOLUTION MAPPING

Finding	Gap Category	Recommended Solution	Success Measure
Service is explained inconsistently.	Knowledge / Process	Create a service guide, FAQ sheet, and standard messaging guide.	Improved knowledge check scores.
Staff struggle with price objections.	Skill	Provide objection-handling practice, coaching, and role-play.	Improved observation checklist scores.
Follow-ups are inconsistent after proposals are sent.	Process / Accountability	Create a follow-up tracker and assign lead ownership.	Percentage of leads with documented follow-up.
Lost inquiry reasons are not documented.	Process	Add lost lead categories and require status updates.	Percentage of leads with recorded lost reason.
Clients decline due to price or schedule.	Market / Offer	Review value messaging, lead qualification, and scheduling options.	Improved qualified lead conversion.

Training Decision Check

Before recommending a solution, the toolkit checks whether training is actually the right intervention.

- Is the issue caused by missing or incorrect knowledge?
- Is the issue caused by weak skill application?
- Is there a clear process supporting the desired behavior?
- Will training alone solve the issue?