



To maximize the financial return of your investment in Salespeople, marketing and the costs of proposal generation, there are some key components to the Marketing and Selling process that should be reviewed and upgraded over time. The following self-assessment may point to some ‘holes’ in your strategy and in the Client Journey; from how the customer learns about you initially all the way through to post-installation and the customer providing Referrals and Testimonials to support new business development.

If any scores are not high enough, that means you are paying out too much compared with the revenue and margins you are earning. There is a way to **CLOSE MORE SALES!**

Please use this table to rate yourself. In each section, use a 1-10 scale where 1 = “we don’t do that” to “10” = ‘we’ve nailed this and execute all the time.’

Key Items / Descriptions	Our Score
<p><b>Orientation Presentation:</b> Do you teach the customer about what is most important in selecting a vendor? Do you teach the client how to select you as the ‘Best’ vendor? Do you share your depth of Expertise? Do you explain “The Customer Process Steps?” Do you share a pile of testimonials? Do you create a strong contrast in your favor vs. your competition? Do all SalesPeople use a uniform Orientation presentation? Do you have a Zoom-mode of remotely presenting Orientation presentations?</p> <p><b>The Goal:</b> “Orienting” the client toward saying <b>YES</b> when they ultimately see your proposal. This should be <b>uniformly presented by all salespeople</b> during the first or 2<sup>nd</sup> meeting.</p>	
<p><b>Proposal Presentation:</b> Does the Proposal amplify the key points that you taught the client from the Orientation? Does it mention both the Referral process and Testimonial process? Do you lead with financing? Do you have a Zoom-hosted process for presenting proposals? Do you follow up regularly with Proposals that do not immediately move forward? Do you know if they did a project 6 and 12 months later?</p> <p>Do you ever send a customer a proposal without presenting it LIVE in person? (hint: bad)</p>	
<p><b>Referral Strategy:</b> Does every client provide referrals after every project? This should be “baked in” and discussed from the 1<sup>st</sup> call and at every step through the selling and installation process. Most businesses fail here by waiting until after the project, or never even asking.</p>	
<p><b>Testimonial process:</b> Similar to Referrals, every client should be providing a testimonial blurb. Do you ask them? Does the customer share their testimonial with their contacts?</p>	
<p><b>Partner Marketing:</b> Do you have strong and reliable relationships that are bringing you new business all through the year? <b>Ex:</b> Associations, Distributors, Manufacturers, Contractors, Other commercial building vendors, Property Managers, Commercial Real Estate, etc</p>	
<p><b>Total Score out of possible 50</b></p>	

For a follow-on Strategy Session to discuss your score and see how to improve your Sales results, call or email Kevin Murray at [kevin@energizeu.com](mailto:kevin@energizeu.com) or 203.410.8150. Please send your completed Assessment.