



EXECUTIVE INTERVENTION

Sales Performance Assessment

Diagnose Before You Develop

A structured, evidence-based assessment that identifies what is helping or constraining sales performance — and where management should focus to achieve the greatest improvement.

ASSESS → IDENTIFY → PRIORITISE → DEVELOP → ENABLE → MEASURE

From diagnosis to measurable sales performance improvement

Why a Sales Performance Assessment?

Sales underperformance is often treated as a training problem. It may not be.

Poor results can be caused by unclear strategy, weak opportunity management, inconsistent sales behaviours, inadequate coaching, ineffective processes, or a combination of these factors. Training one symptom without understanding the underlying cause can produce activity without sustained performance improvement.

What management may see	What may actually be happening
"We need better closing skills."	Opportunities are being poorly qualified earlier in the sales process.
"Our team is not prospecting enough."	Salespeople lack a compelling value proposition, targeting discipline, or effective prospecting approach.

The purpose

The Executive Intervention Sales Performance Assessment gives management a structured view of the sales environment, identifies performance gaps, distinguishes symptoms from causes, and prioritises the interventions most likely to improve results.

The objective is not simply to produce a score. It is to create clarity about what needs to change — and why.

The Four Pillars of Sales Performance

The assessment examines four interconnected areas that influence sustainable sales performance.

01

Sales Strategy & Direction

Is the team clear about where growth will come from and how the organisation intends to win?

What are the company business objectives in terms of financial targets plus other important objectives such as specific product targets and/or specific markets etc.

02

Sales Process & Execution

How effectively does the team convert activity and opportunities into business?

Prospecting • qualification • discovery • value conversations • opportunity progression • objections • negotiation • closing • follow-up

03

Sales Capability

Do salespeople have the skills, knowledge, behaviours and commercial capability required to succeed?

Questioning and listening • business acumen • value-based selling • negotiation • account development • confidence • sales discipline

04

Sales Management & Enablement

Does the sales environment reinforce the behaviours required for consistent performance?

Leadership • coaching • KPIs • pipeline management • CRM and tools • accountability • enablement • reinforcement

How the Assessment Works

The process combines structured questioning, defined scoring criteria and management analysis to build an evidence-based picture of the current sales performance environment.

- 1 Management Discovery** — Understand business strategy, objectives, sales challenges and expectations.
- 2 Structured Assessment** — Evaluate the four pillars against defined performance criteria.
- 3 1-5 Scoring** — Score each area consistently to make strengths and gaps visible.
- 4 Gap Analysis** — Identify the issues most likely to be constraining sales performance.
- 5 Prioritisation** — Separate critical performance priorities from lower-impact issues.
- 6 Recommendations** — Translate findings into a practical sales performance improvement roadmap.

Illustrative 1-5 scoring approach

1	2	3	4	5
Significant Gap	Weak	Developing	Effective	High Performing

Note: the final scoring descriptors should reflect the detailed criteria used in the Executive Intervention assessment.

What Management Receives

The assessment is designed to convert diagnosis into management clarity and action.

Executive Performance Summary	A concise view of the sales organisation and the most important findings.
Sales Performance Scorecard	A visual summary of performance across the four pillars and assessed areas.
Strengths	Capabilities and practices that should be protected, replicated or leveraged.
Performance Gaps	Areas where strategy, capability, process, management or execution may be restricting results.
Priority Issues	The small number of issues that deserve management's greatest attention.
Recommendations	Practical actions linked directly to the identified performance gaps.
Improvement Roadmap	A sequenced plan that may include training, coaching, management development, process improvement and enablement.

The management questions we want to answer

Where are the most significant gaps in our current sales performance?

What is causing those gaps?

What should we do about them?

From Assessment to Performance Improvement

The assessment is the starting point — not the end point. Its value lies in directing improvement activity toward the areas where it can have the greatest impact.

ASSESS	Establish the current state
IDENTIFY	Determine the critical performance gaps
PRIORITISE	Focus on the issues that matter most
DEVELOP	Build the required skills, processes and management capability
ENABLE	Provide tools, coaching and reinforcement
MEASURE	Track progress and demonstrate improvement

Diagnose first. Develop second. Enable continuously. Measure improvement.

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