Sales Process discovery questions

Sales Process discovery questions

**Responsibilities / “Sales Paths”:**

1. What are all of the responsibilities (or “Paths”) that you cover in your role in order to achieve your main goal?

*(For example: BDRs often cover inbound leads generated from marketing, incoming chat inquries, and outbound self-sourced leads using LinkedIn. They achieve their main goal of creating new opportunities by contacting leads from each of these sources or “sales paths”.)*

**List each path covered by the reps who will use Playbooks:**

**Record Management:**

For each "sales path" identified from the previous question:

1. What does the rep work with: Leads, Contacts, Opportunities, Accounts, Custom Objects?
2. Does the rep own the records they work with?
3. Where does a rep go in the CRM to access records? (Does the rep use views, reports, other?)
4. How does a rep prioritize or decide which records to work first?
5. How does the rep initially engage with the prospect?
6. What is done in the CRM to record that action?
7. What fields on the Task are required when logging a phone call and an email?
8. If the prospect is not interested what field updates occur on the record?
9. If the prospect is interested what field updates occur on the record?
10. What other fields does the rep need to keep up to date while following the process?

**Daily Structure:**

1. How does a rep usually structure their day? ***What time of day*** do they usually focus on each of their responsibilities?

**Baseline:**

1. How many calls, emails, appointments, new opportunities, or closed deals are they generating in a day, week, month, or quarter? **(Identify the accurate current performance for at least one KPI.)**

**Compensation & CRM:**

1. How do you get paid? What do you have to do in SFDC?
2. How often are the numbers calculated to determine your variable pay?
3. How often do you receive your variable pay?