

SALE

QUALITY ASSURANCE CHECKLISTS FOR SALES ORG

Supporting Sales Org to grow and thrive!

INTRODUCTION



Ensuring High-Quality Customer Experience

The checklists focus on maintaining a consistent and exceptionally high level of service for customers as delivered by the Sales Organization which is seized with Customer Acquisition.



Standardized Service Delivery

The checklists help standardise the sales process and ensure that all interactions with customers meet predefined quality standards.



Continuous Improvement

The checklists provide a framework for ongoing evaluation and enhancement of the sales processes, enabling the organization to continuously improve its service delivery.

The introduction slide provides an overview of how the quality assurance checklists are designed to uphold a high standard of service within the Sales Organization, ensuring customer satisfaction and driving continuous improvement.

SCOPE OF THE CHECKLISTS

- **Lead Generation and Qualification**

The checklists cover the entire process of lead generation, including techniques for identifying potential customers, qualifying leads based on defined criteria, and determining their readiness for the sales process.

- **Sales Process**

The checklists guide the sales team through the various stages of the sales process, from initial contact and needs assessment to proposal presentation, negotiation, and closing the sale.

- **Installation and Customer Satisfaction**

The checklists ensure that the installation process is seamless, with detailed steps for site preparation, product delivery, and customer onboarding. They also include measures to assess customer satisfaction and address any post-installation concerns.

- **Post-Installation Support and Referrals**

The checklists outline the procedures for providing ongoing support to customers, including troubleshooting, maintenance, and warranty-related services. They also include guidance on obtaining referrals and testimonials from satisfied customers.



KEY EMPHASIS AREAS

- **Accurate Data Collection**

Ensuring that all data collected is precise and reliable, with a focus on attention to detail and cross-checking for errors.

- **Thorough Documentation**

Maintaining comprehensive and organized documentation throughout the sales process, providing a clear audit trail.

- **Adherence to Industry Standards**

Aligning with established best practices and regulations within the industry to ensure compliance and credibility.

- **Clear Communication with Customers**

Ensuring transparent and effective communication with customers, keeping them informed and addressing their concerns promptly.

- **Timely Follow-up**

Proactively following up with customers and internal stakeholders to maintain momentum and provide a superior customer experience.

Q Sales Team Pre-Sales × Search...

Qualified +

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- Interest in your products**
 \$ 2,000.00
 The Jackson Group
 Product Information
 ★★☆☆
- DeltaPC: 10 Computer Desks**
 \$ 35,000.00
 Ready Mat
 Information Training
 ★☆☆☆
- Need 20 Desks**
 \$ 60,000.00
 Product Consulting
 ☆☆☆

Proposition

- Open Space Desi**
 \$ 11,000.00
 Deco Addict
 Design
 ★★☆☆
- Office Design an**
 \$ 9,000.00
 Ready Mat
 Design Consulting
 ★★☆☆
- 5 VP Chairs**
 \$ 5,600.00
 Azure Interior, Coll
 Product
 ★☆☆☆
- Customizable De**
 \$ 15,000.00
 Azure Interior
 Product
 ★☆☆☆

UTILISING ODOO CRM

The checklists provide a comprehensive guide for utilizing Odoo CRM, a powerful customer relationship management (CRM) platform, to streamline sales processes and track key performance metrics. Odoo CRM offers a range of features and functionalities that can help sales organizations optimize their operations and improve customer engagement.

QUALITY ASSURANCE CHECKLISTS FOR SALES ORG

Consistent Quality

Checklists ensure that sales processes are executed consistently, leading to a uniform, high-quality customer experience.

Improved Customer Satisfaction

Consistent execution of sales processes improves customer satisfaction, as their expectations are reliably met.

Increased Referrals

Satisfied customers are more likely to refer your business to their friends and colleagues, driving new business growth.

Reduced Errors

Checklists minimize the risk of overlooking critical steps, reducing costly mistakes and ensuring all necessary tasks are completed.

Streamlined Operations

Checklists provide a clear, standardized workflow, improving efficiency and productivity across the sales organization.



QUALITY ASSURANCE CHECKLISTS FOR SALES ORG

Sales Administrator & Sales Manager

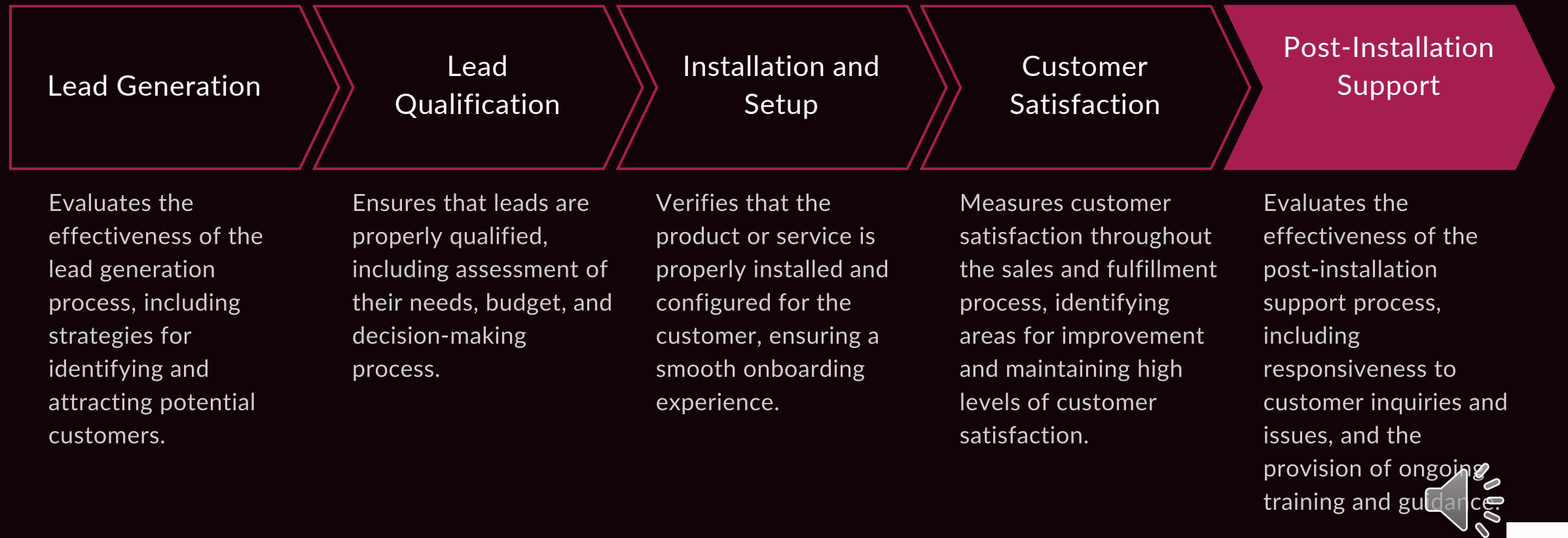
Service Delivery Administrator & Service Delivery Manager

Quality Assurance Officer & Operations Manager

Executive Committee (Exco) Members



CHECKLIST COMPONENTS




PERFORMANCE TRACKING

Key Performance Metric	Performance Level
Customer Satisfaction	CSAT Score of 80%+ of customers reported being satisfied or very satisfied with the sales process based on post-sale surveys.
Referrals	60% of new sales leads came from existing customer referrals, exceeding the industry average of 40%.
Net Promoter Score	NPS Score of 80%+ from 90 day clients on a quarterly basis
Installs Delivered within Standard Delivery Date	95% of installations delivered within Standard Delivery Date (SDD)



“EVERY COMPANY'S SALES TEAM REQUIRES A QA PROGRAM TO NOT ONLY MEASURE HOW WELL SALES AGENTS COMPLY WITH THE COMPANY'S POLICIES AND PROCEDURES, BUT ALSO TO ENSURE THEIR CONTINUOUS IMPROVEMENT.

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 <https://cloudtask.com>