

Client:
Date:

Benchmarking Assessment Matrix

Sales & Marketing

Defining the Market and Services/Products

- 1 The employees have an excellent understanding of the services/products
- 2 The Company has developed a profile of who the current customers are
- 3 The Company has an accurate measurement of the market share
- 4 The Company has developed a profile of potential customers of the services/products
- 5 The Company knows whether or not the existing markets are saturated, growing or shrinking.
- 6 The Company has examined the possibility of other markets emerging

Marketing Plan

- 7 The marketing plan supports the business objectives and mission statement
- 8 The Company has determined which markets are most profitable
- 9 The Company knows which of the services/products are most profitable
- 10 The Company can measure the effectiveness of the current marketing strategy
- 11 The Company has compared the strengths and weaknesses to those of the competitors
- 12 The Company is targeting the marketing efforts in areas where the competitors are weak, not strong.

Selling

- 13 The sales people have a thorough knowledge of all the services/products
- 14 The sales people have an excellent knowledge of the field and market
- 15 The sales people have previous experience in the field and market
- 16 The sales people have excellent communication skills
- 17 The organization understands the customer and clearly communicates value of service/product (brochures, attitude, sales presentation, etc.)
- 18 Every employee acts as a sales representative
- 19 The managers consistently provide effective coaching on strategy & tactics for key accounts and major sales opportunities

Customer Relations

- 20 Employees who deal with customers have excellent communication skills
- 21 Employees can successfully resolve customer complaints
- 22 The Company uses the customers to help us identify areas for improvement
- 23 Weekly/monthly/quarterly sales reports exist with variances from forecasted sales
- 24 Sales variances are accurately reported
- 25 Sales productivity per sales person is tracked weekly/monthly/quarterly
- 26 An appropriate mix of revenue comes from established vs. new customers

Reporting

- 27 Weekly/monthly/quarterly sales reports exist with variances from forecasted sales
- 28 Sales productivity per sales person is tracked weekly/monthly/quarterly
- 29 An appropriate mix of revenue comes from established vs. new customers

Financial Management

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Purchasing

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Sales & Marketing

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Technology

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