Action Audit #4.32

	Action Description:	Upsell all major customers	Improve the effectiveness of the sales process for larger deals with a focus on team selling to optimise company margins, and closure rates.
1	Does the action add value?	The development and better qualification of specific leads will produce more profitable quotes that results in adding significant value	
2	What value does it add?	The value it adds includes making more effective use of resources, reducing the costs of sales (hence increasing margins), and prioritising the projects of greatest value	
3	What could go wrong?	Risk exists that current resources are expended on lesser priority prospects. Lack of planning in reviewing all leads against each other. Doing a project for the sake of doing a project. Lack of information (making assumptions) about the prospect situation leads to inappropriate sales actions.	
4	How likely is that?	It is estimated that 30% of the projects currently undertaken are "not right" (for a variety of reasons). Implications and commitments to our Company are not always fully understood.	
5	What could be done to reduce that risk?	Meet regularly to review leads and plan for managing the leads. (Currently 3 meetings per week.) Target clients. Information in the Excel spreadsheet is available to all staff. More effective analysis of opportunity. Early engagement of team and their ideas (including operations) in converting best prospects.	
6	Are there procedures to follow? What?	Have procedures, but not documented. No common process for all "sales" people.	
7	Are there forms to be filled in? What?	Sales and Strategy meeting Reports. Weekly Production Report (Sales Pipeline).	
8	Is there information the operator should know?	Operators and all staff can have access to the Weekly Production Report	
9	How is the performance to be measured?	Measuring the number of leads (in 3 x Tiers). The % of leads converted to quotes. The % of quotes converted to projects. C___ ___ % of r__nue per project.	
10	What is the target measure?	Should be established for each tier. (e.g. 30% for the leads converted to quotes and 50% of quotes converted to p_____ ____ ___ ___ to be max of 5% of project revenue).	
11	What is the current performance like?	Not bad, close to target ????	
12	How could it be improved?	Better communication between internal Company people. Getting higher quality leads, getting higher ___ ___ _____ on process. Team engagement in innovative solutions.	
13	What does the action cost?	Not known as information not kept	
14	How long does it take to do?	Effectiveness and efficiency of qualification and sales process is key.	
15	What are recommendations?	Spread "load" (responsibility) of selling or "engaging" our major clients across more people. Include the operational staff in sales process. Educate all staff into the importance of the client engagement process. Engage the whole "sales" team. Improve intensity of positive attitude of all staff in engaging the client before a contract is made. Introduce a company CRM system. Enhance value of "Weekly Production Report".	
Status:	LOCKED: Project created	Audit conducted by: TMP	Dated: 20th December 2003