**Sales Management Check List**

Please rate next to each task how you are operating right now (within the last 2-3 weeks)

0 = Not at all 1 = Occasionally 2 = Often 3 = Always

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| --- | --- |
| **Activity** | **Rating** |
| Use the staff induction check list to induct new membership consultants |  |
| New membership consultants shadow another team member for first 1-2 shifts when onboarding |  |
| Allocate a training item from the sales manual or webinar series each week |  |
| Using the sales manual phone scripts section on inbound and outbound calls |  |
| Using the sales manual for sales procedures |  |
| Inspection of appointments due for the day ahead |  |
| Implementation of the upper hierarchy close policy |  |
| Inspect tours not sold and check the GTKY forms for rooms of improvement of delivering the needs analysis and assisting with the follow up of that prospect |  |
| Inspection of shift slips appointments and contacts |  |
| Inspection of end of day report of lead generation and referrals |  |
| Checking all required contacts have been made in CRM and checking some of the notes to ensure the proper messages are being left and allocation of follow up calls match the flow chart |  |
| Setting the team up daily with required contacts, scripts, sales manual training, face to face training and tasks due to reach sales targets |  |
| Setting up monthly in club referral activity and promotion |  |
| Daily reviewing of Exerp and the Sales Performance Report |  |
| Regular review of the and the Month to Date Growth Report |  |
| Weekly reviewing in Exerp Sales Performance Report / gross sales report and monitoring flexi memberships to be under 30% |  |
| Weekly reviewing % of add on services such as PT, FIIT30, Hypoxi, Reformer |  |
| Weely in house training and role plays |  |
| Weekly meeting with team for individual performance |  |
| Using a referral table/ stand in studio once a month |  |
| Ensuring the point of sale referral system is being conducted |  |
| Taking your team out for outreach 1 x week |  |
| Using an outreach calendar to plan your activities for the upcoming month |  |
| Communicate to the entire team the promotions of the month and how each department need to execute them |  |
| Calling all Flexi’s from the month prior and using the upgrade script to convert them to longer term options / upsell additional services |  |
| Have more than 5 marketing channels spinning for lead generation |  |
| Train staff on how to handle cancellations and regularly inspect how many saves a week are being done |  |
| **Total** | **/ 81** |