



X Uhubs

Driving Data-Driven Sales Enablement Together

Sales Leadership Checklist



Insights from Richard Ellis (Revenue Innovations)





1. Protect the Core

- Identify non-essential activities and eliminate them
- Focus resources on revenue-driving tasks and fundamentals
- Consolidate tools and technology to streamline operations

2. Reset Team Mindset

- Reassess current team habits and behaviours
- Reinforce accountability and consistent routines
- Communicate proactively during downturns

3. Revisit Sales Fundamentals

- Reevaluate the sales process and cut unproductive steps
- Rebuild training around core skills and behaviours
- Align team around key metrics that matter

4. Targeted Pipeline Approach

- Focus on high-value, strategic opportunities
- Reduce low-quality outreach to maximize ROI
- Ensure every deal aligns with customer success

5. Boardroom Alignment

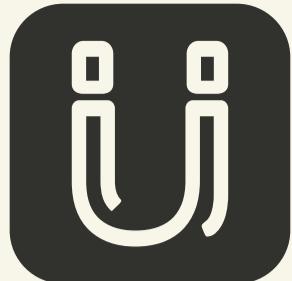
- Set realistic expectations with leadership and stakeholders
- Reforecast proactively during tough quarters
- Highlight key wins and process improvements

6. Process Over Results

- Track consistent actions, not just outcomes
- Standardize processes that lead to predictable success
- Coach team on repeatable behaviours

7. Mindset Under Pressure

- Focus on what is controllable: habits, routines, focus
- Encourage resilience in challenging market conditions
- Lead by example in discipline and consistency



8. KPIs That Matter

- Measure stakeholder engagement and collaboration
- Track true customer understanding, not just closed deals
- Monitor early indicators of success across teams

9. Leading Indicators

- Observe relationship strength with customers and partners
- Track internal collaboration and knowledge sharing
- Use early signals to prevent pipeline surprises

10. In-Person Advantage

- Schedule face-to-face meetings with strategic customers
- Leverage personal interactions to build trust and credibility
- Blend digital tools with human connection strategically

11. Doing the Hard Work

- Take on tasks most avoid but drive results
- Coach and mentor team consistently
- Invest in process improvements and skill development

12. Power of Restraint

- Recognize when to slow down and rebuild strength
- Avoid over-activity that burns resources and focus
- Make strategic pauses for long-term gain

13. Owning the Pipeline

- Source your own high-value deals
- Lead initiatives instead of waiting for assignments
- Maintain visibility and control over pipeline health

14. Technology & AI

- Automate repetitive, transactional tasks
- Focus human effort on strategic, high-value interactions
- Prioritize EQ, trust, and relationship-building