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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