SOS
SALES CLARITY AUDIT

Pinpoint the 3 Biggest Gaps in Your Sales System in Under 30 Minutes

Use this audit to assess where your sales process is breaking down — and where to focus for immediate growth.

SOS

THE AUDIT FRAMEWORK

This quick self-assessment is designed to help Sales Leaders, Founders, and Entrepreneurs uncover where their sales system is underperforming.
Score each statement 1–5:

1 = Not true at all

5 = Fully implemented and working well

SECTION 1: PROCESS & STRUCTURE

- We have a documented sales process that is consistently followed.
- Sales stages are clearly defined and tied to specific actions.
- We use a playbook to guide reps through each stage of the pipeline.
- Sales conversations are aligned with a clear methodology.

Score: (Out of 20): _ _ _ _ _ _

SECTION 2: PEOPLE & PERFORMANCE

- New reps ramp up in under 90 days.
- Our team receives ongoing training or coaching.
- Each role has clear KPIs and ownership.
- High performers are recognized and developed.

Score: (Out of 20): _ _ _ _ _ _

SECTION 3: PIPELINE & PROSPECTING

- We generate qualified leads consistently each week.
- We have a defined outreach process (like 14-40 or 21-Day Pursuit).
- Our CRM is accurate and actively used.
- We track conversion rates from lead to close.

Score: (Out of 20): _ _ _ _ _ _

- We track core sales KPIs weekly.
- Forecasting is accurate and data-informed.
- We coach performance based on metrics, not feelings.
- We review pipeline health regularly.

Score: (Out of 20): _____

CLARITY RESULTS & NEXT STEPS

Instructions:
Look at your lowest section score.
That's your greatest opportunity for immediate revenue impact.

COMMON GAPS AND IMPACT:

- No process? → Random results, low rep confidence.
- Weak onboarding? → 3–6 months of lost productivity per hire.
- No metrics? → You can't scale what you can't see.
- No outreach rhythm? → Leads fall through the cracks.

TAKE THE NEXT STEP

Want help turning your audit into action?

Schedule your free **SOS Sales Clarity Call.** We'll walk through your audit together and identify your top 3 growth levers.

BOOK NOW ❯

https://calendly.com/ryanjamesmiller/sos-discovery-call