



Gaining Insight into Your Sales and Marketing

Checklist



Gaining Insight

One of the best ways to make an immediate impact in your business is to examine what has worked well in the past and what you can double down on in the future. Understanding your sales and marketing efforts up to this point will uncover a lot of data you can learn from.

By answering the questions below on a regular basis, you will be able to have a 360 view on where your best successes lie.

For more insight into how to make the best use of this template, we have created a series of Checklists which are available within the Sales Academy.



Gaining Insight into your Sales and Marketing - Interactive

Open in Adobe Acrobat and fill out the highlighted fields.

<p>Sales and Marketing</p> <ul style="list-style-type: none">• Where have you seen the greatest quality engagement?• How does this differ from the engagement you were aiming for?• Have you defined the source of where leads come from?• Total number of leads month on month, and year on year?• Have you experienced any uplift related to certain events, e.g summer holidays, business events?• Are you scoring leads based on relevance to your business?• What is the ROI from each marketing channel?	
<p>Campaigns</p> <ul style="list-style-type: none">• Which of your campaigns have been most successful?• Which campaigns were the best use of ROI?• Which campaigns have won you long-standing clients?	

Gaining Insight into your Sales and Marketing - To Print

Print out this template and fill in the fields.

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