

Sales Audit Overview

A practical, executive-level evaluation of your sales organization.

The Sales Audit is a structured, 360-degree review of your sales function—designed to uncover what’s slowing down pipeline creation, where deals break down, and what improvements will have the biggest impact on revenue. In a short amount of time, we’ll gain a clear understanding of your team’s strengths, the systems they rely on, and the opportunities that can accelerate performance.



We begin with conversations, data analysis, and an honest look at current-state performance. This includes pipeline reports, CRM activity, forecasting accuracy, sales KPIs, and deal progression trends. These insights form the baseline for everything that follows.

Next, we examine how your team works day-to-day: qualification, discovery, outreach, follow-up, call structure, proposal quality, and overall deal strategy. The goal is to identify gaps, friction points, and behaviors that either accelerate or slow down opportunities moving through the funnel.

Lead quality and handoff consistency play a major role in revenue predictability. We assess MQL/SQL definitions, follow-up speed, routing, and the communication rhythm between departments to isolate where leads stall or get lost.

A clean, reliable CRM is the backbone of any high-functioning sales team. We evaluate workflows, data hygiene, activity tracking, stage progression, reporting, and any areas where the tool is creating administrative drag instead of efficiency.

We review rep performance, role clarity, compensation alignment, training, enablement, and management structure. This helps determine whether challenges stem from skill gaps, process gaps, or leadership gaps.

At the end of the audit, you’ll receive a clear, prioritized Sales Audit Report that outlines what’s working, what’s underperforming, where deals break down, the immediate opportunities for improvement, and a 30–60–90 day path forward — a practical blueprint your team can act on right away. *Start your sales transformation today by visiting TheFractionalExecutiveNetwork.com or calling 630-885-6257!*