



CRO Success

Revenue System Audit Materials

1. Sales Cycle Time Line (first contact to customer)
2. Commission / Performance Incentive Plan
3. Assigned Quotas, Goals, Targets – need the #'s
4. W2 Summary - last 3 years by Rep.
5. New accounts / business – last 3 years
6. Organization Chart – Accountability Structure
7. Product, Territory, Market and Distribution Structure
8. Forecast Review / Update Process
9. Sample Forecast Reports
10. CRM sample reports
11. Top 3 Account Plans
12. Weekly / Monthly Activity Reports
13. Lost Order Reports for the last 6+ months
14. House Account List & Reference Account List
15. Competitors by Market Segment with their web site address
16. Current Major Accounts – Top 10 List
17. Target Accounts – Top 10 List
18. Size of current prospect & customer list
19. Target Prospect Profile by Market Segment
20. Customer Life Cycles / Retention Programs