1102: Daily Sales Accountability

1100: All Sales Policies · https://milo.masseyservices.com/docs/1102-daily-sales-accountability/

Section: Sales
Subject: Daily Sales Accountability
Approved by: Anthony L. Massey
Effective Date: 1 June 2014
Last Reviewed Date: 6 June 2014
Policy Owner: Vice President of Business Development

Policy

> WE ARE COMMITTED TO ONGOING TRAINING AND EMPLOYEE EDUCATION WHICH DEVELOP PRIDE, JOB ENRICHMENT, AND PERSONAL AND PROFESSIONAL GROWTH.

The General Manager will conduct a “Daily Check-in Session” each morning with each Sales Team Member. The purpose of the Sales Accountability Session is to ensure:

- an urgent and professional response to all leads
- high sales productivity
- quality sales
- coaching and assisting the Team Member on improving sales skills, sales efficiency and effectiveness.

All Sales Team Members must be ready for the Daily Check-in Session by 8:00 a.m. each day. All paperwork must be complete and organized as follows:

- Daily Sales Activity Report
- Service Agreements and Payments
- Graphs, Specifications and Worksheets
- Today’s Prelist

Each Sales Team Member must be prepared to discuss all paperwork, leads received, lost sales, pending sales, call backs, proposals and today’s planned activity

THIS “ONE ON ONE” DAILY ACCOUNTABILITY WILL FOCUS ON THE FOLLOWING:

Daily Sales Activity Report

- Name, Address, Phone Number
- Number of calls listed vs. number of calls required
- Number of proposals made vs. number of proposals required
- Number of cloverleaf’s made compared to number of leads and sales
- Overall creative sales activity
- Number and dollars of sales made, compared to sales quota
- all back dates

The General Manager will file a copy of the signed Daily Sales Activity Report in a monthly file for each Sales Team Member.

Service Agreements and Other Paperwork

- Completeness (correct address, zip code, phone number, email address, customer signature, etc.)
- Down payment, PIA, or Auto Bill Pay
- Proper instructions and directions
- Rate Card (audit for compliance)
- Graphical Analysis, Inspection Report, and Specification Sheet (complete and accurate)
- Start Sheet
- All other required paperwork

Lead Log

- All Sales Team Members will be held accountable for every lead received until every lead is sold or lost. All leads must be inputted in the Lead Log and onto the Daily Sales Activity Report and follow up according to commitments until sold or lost.

- The General Manager must contact unsold leads within 2-3 days of the proposal to determine “Why they didn’t buy from our Company.” When calling, these questions should be explored:
  1. Did we keep appointment and were we on time?
  2. Did we make a thorough inspection?
  3. Did we offer a logical explanation of problem? Solution?
  4. Did we put it all in writing (proposal)?
  5. Did we explain the features and benefits of our guarantee?
  6. Was our price competitive?
  7. Specifically, why didn’t you buy from us? Who did you buy from? What would it take to have you become a customer today?

The General Manager will evaluate and analyze the responses from unsold leads and make the necessary adjustments, including:

1. Instructions to Sales Team Members, including working in the field with Sales Team Members and offering corrective instructions.
2. Recommendations to Regional and Corporate Management, in addition to the Marketing Department.

Today's Plan and Prelist

- A copy of today’s pre-list (Daily Sales Activity Report) and the 1-31 Appointment Book will be reviewed to ensure all callbacks are listed and the Sales Team Member has scheduled a fully productive day.
- The General Manager will work with each Sales Team Member developing and using a target account list and other prospecting techniques (see “The Genesis of Selling”) to ensure a constructive and productive day, every day. Everyone’s success depends on it!

> WE BELIEVE “OUR PEOPLE MAKE THE DIFFERENCE.” KNOWING THAT OUR FUTURE RESTS SQUARELY ON THE WORK ETHIC, IMAGE, KNOWLEDGE, IMAGINATION, SKILLS, DEPENDABILITY, AND INTEGRITY OF OUR EMPLOYEES, WE RESPECT AND VALUE THESE QUALITIES MOST HIGHLY.

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