

CRM Pipeline Checkin

1. Provide a rundown of your book of business in the CRM via zoom (on your screen share)
2. Pipeline management: Are you calling your clients every 30 days? Are you tracking your activity?
3. Let's spot check: How many books/possibles/closes/sales do you have projected for this month?
4. How's the flow of leads - is there a shortage, too much, etc?
5. How many outbound calls are you making a day/# of clients you're calling?
6. Are you performing your CRM admin tasks (updating deal stages, cadence, notes, logging activity, etc)?
7. Any constraints?
8. Any changes/updates we need in the script or rebuttals?
9. Any changes in the sales/operations process that need discussed?
10. Any SOPs need created?
11. Any resources or training needed?
12. Any changes with operations?
13. Any new business opportunities?