

# Maximising Sales Rates Checklist

Use this checklist to identify where your later living property can improve its marketing and sales activities to maximise sales rates.

## Strategy

Satisfaction Low ← → High					Strategy levers	Evaluation
1	2	3	4	5	Marketing & Sales Strategy	How effective is your plan for reaching, engaging and converting prospects into customers?
1	2	3	4	5	Market Positioning	How well do you understand how you are perceived in the market?
1	2	3	4	5	CRM	How effective is your use of a CRM system to track interactions and help optimise your sales and marketing?
1	2	3	4	5	Target Customer Clarity	How would you rate your understanding of your target customer? Do you have clear buyer personas?
1	2	3	4	5	Understanding motivations and barriers	How would you rate your knowledge of your buyer's challenges and drivers?
<b>Score: /25</b>						

## Marketing

Satisfaction Low ← → High					Marketing levers	Evaluation
1	2	3	4	5	Website	How would you rate your website? Is it easy to navigate, mobile responsive, aesthetically pleasing and with clear call to actions?
1	2	3	4	5	Signage	Does your site have street signage that makes it easy to find?
1	2	3	4	5	Online Presence	How effective is your online presence? How easily can you be found on search engines? Are you visible enough on social media?
1	2	3	4	5	Brand Proposition	How would you rate your brand's proposition? Is it clear to all?
1	2	3	4	5	Marketing Materials - Messaging/Imagery	How do you feel about your brand's messaging and imagery? Does it reflect your positioning? Is it consistent across channels? Do you use customer testimonials?
1	2	3	4	5	Offline Marketing	How effective is your offline strategy? e.g presence in print advertising, hoardings, local radio, PR, out-of-home?
1	2	3	4	5	Lead Generation	How effective is your process for generation new quality leads?
<b>Score: /35</b>						

## Events

Satisfaction Low ← → High					Events levers	Evaluation
1	2	3	4	5	Prospect Events	Do you have enough prospect events – e.g. Open days; Coffee mornings?
<b>Score: /5</b>						



## Partnerships

Satisfaction Low ← → High					Partnerships levers	Evaluation
1	2	3	4	5	Partnerships	How effective are your local and national partnerships?
1	2	3	4	5	Influencers / Ambassadors / Resident Referrals	Do you have a sufficient amount of organisations and individuals who are part of a referral scheme and incentivised to promote your business?
<b>Score: /10</b>						

## Sales

Satisfaction Low ← → High					Sales levers	Evaluation
1	2	3	4	5	Pre-Discovery Call	How effective are your pre-discovery calls in assessing buyers suitability, and understanding their motivations/barriers? Securing a tour/home visit?
1	2	3	4	5	Tour	How effective are your team in building rapport and selling a lifestyle vs product-centered sales? Was sufficient information provided?
1	2	3	4	5	Follow-up	How effective is your follow-up to ensure consistent and proactive communication?
1	2	3	4	5	Sales Professionals	How effective are your sales professionals? How skilled are they at understanding your customer, addressing their needs, and building a connection?
1	2	3	4	5	Target Measurement	How effective are your targets in measuring conversion rates along the customer journey? Are your sales team's incentives linked to the right KPIs?
<b>Score: /25</b>						

**Total Score: /100**

**Want to improve your score?**

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