

Evaluation Checklist

Before choosing a sales training, coaching, or enablement partner, can you confidently answer these questions?

01 Diagnosis & Customization

- ☐ Do they study our funnel, sales cycle, conversion points, and losses before recommending a solution?
- ☐ Do they understand our buyers, buying process, competitive environment, and value proposition?
- ☐ Do they understand the realities of our SaaS business model, including recurring revenue, renewals, expansion, and complex buying decisions?
- ☐ Will they identify our performance gaps rather than assume they already know the problem?
- ☐ Are they adapting their methodology to our sales environment, or primarily customizing examples and terminology?

02 Experience & Expertise

- ☐ Who will actually train and coach our team?
- ☐ Have those people personally sold in SaaS/software?
- ☐ Have they led sales teams and carried responsibility for results?
- ☐ Have they held senior leadership or C-suite positions?
- ☐ Will we work with those experienced practitioners throughout the engagement?

03 Sales Philosophy & Methodology

- ☐ Is the methodology consultative?
- ☐ Does it teach sellers to uncover and establish value rather than rely primarily on features and benefits?
- ☐ Does it equip salespeople to follow a disciplined process while genuinely understanding and serving their buyers?
- ☐ Does the methodology fit the sales culture we're trying to build?
- ☐ Does it build on our existing strengths rather than requiring us to discard everything we're already doing well?

04 Application & Competency

- ☐ How will sellers practice what they're learning?
- ☐ Does coaching include realistic role-play?
- ☐ Is actual execution observed by a qualified coach?
- ☐ Do participants receive specific feedback and another opportunity to demonstrate the skill?
- ☐ Can the provider distinguish between knowing the methodology and being able to execute it?

05 Certification

- ☐ What exactly does “certified” mean?
- ☐ Is certification based on attendance, knowledge testing, application, demonstrated competency, or some combination?
- ☐ What must a salesperson actually demonstrate to earn certification?
- ☐ Who evaluates competency, and how are certification standards communicated?

06 Reinforcement & Measurement

- ☐ What happens after formal training ends?
- ☐ Does reinforcement involve continued practice and coaching rather than simply more content?
- ☐ How are the frequency and duration of reinforcement determined for our organization?
- ☐ How will we know whether seller behavior has changed?
- ☐ What business or sales-performance measures will we examine to determine whether the initiative is working?

07 Sales Enablement & Sustainability

- ☐ Can our own people be trained to teach and reinforce the methodology?
- ☐ Can internal leaders learn to coach and evaluate competency, not simply deliver course material?
- ☐ How will new hires learn the methodology six months or a year from now?
- ☐ What tools, resources, and ongoing usage rights will our organization retain after the engagement?
- ☐ When the consultants leave, are we more capable than we were before they arrived?

THE QUESTION THAT MATTERS MOST

When the consultants leave, are we more capable than we were before they arrived?