Drive Sales Checklist

Target actions that can boost your top line

The pandemic and hobbled economy have taken their toll. Small business owners are ready for recovery and will look to sales revenue as a leading recovery metric.

Restoring sales will lift your business out of the uncertainty and strain of the pandemic. You'll have an easily observed indicator to show whether your business is connecting with your customers. From there, you can tweak operations, add digital technologies, improve customer service and adapt to the latest business conditions.

To get sales humming, you'll need plenty of great ideas. And you'll want the means to zero in on the best ideas as well as a plan to get them done. Use our Drive Sales Checklist below and get moving toward the sales you need.

Customize your Drive Sales Checklist, and outline the next steps for your business.

Awareness and positioning

Check those that apply:

	Strategy	Priority (A, B, C)	Next Step (target date/assigned to)
○	**Send personal communications to your top customers** — Call or send an email or text. Remind them you're operating and they're important to you.		
○	**Produce an email update about your company, its solutions and your customers** — Tell customers about how your products can help with the specific challenges of the pandemic and recovery.		
○	**Add new content to web and social media pages** — Create a marketing campaign to spread product awareness and convert customers.		
○	**Try a new product or bundle** — With all the disruption, customers are more open to new offerings.		
○	**Make it easy for customers to reply and buy** — Have a link in communication messages with a call-to-action and an option to buy.		
○	**Offer a discount for orders placed after reopening** — Generate interest and target customers whose buying power is reduced.		
○	**Study competitors and similar-sized businesses in other industries** — Learn by asking customers about experiences with competitors.		

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Prospecting and business development

Check those that apply:

	Strategy	Priority (A, B, C)	Next Step (target date/assigned to)
○	**Keep talking** — Target methods with highest rates of response (email and text message) or rates of reposts and shares (social media).		
○	**Ask customers for input** — Send consumers surveys through Qualtrics or SurveyMonkey and record/analyze their responses.		
○	**Be a resource and industry expert** — Provide friendly, step-by-step guidance and use tips for your products.		
○	**Target customers who may buy more of your products** — Promote complementary services and bundles.		
○	**Set up a social media page to engage customers** — Gain followers on Twitter, Instagram, and Facebook by posting frequently with meaningful and engaging content.		
○	**Create a new customer profile to target** — Target a new segment by spending habits and/or demographics.		
○	**Experiment with new markets and channels opened by changing customer needs and buying patterns** — Canvas allies in the industry to gather information on new market opportunities.		

Sales engagement

Check those that apply:

	Strategy	Priority (A, B, C)	Next Step (target date/assigned to)
○	**Build relationships and solve customer problems** — Follow up with customers and help them use products effectively.		
○	**Use video conferences to connect customers with your staff and salespeople** — Zoom, Skype, and/or Microsoft Teams can create more interactive sales meetings and pitches.		
○	**Design add-ons and up-sell** — It is easier to generate sales from customers who already have relationships with you, and add-ons can strengthen relationships as well as boost retention.		
○	**Recognize long-time, loyal customers** — Reward loyal customers with coupons and discounts, and think about a rewards program to strengthen your relationships.		

Sales process and distribution

Check those that apply:

	Strategy	Priority (A, B, C)	Next Step (target date/assigned to)
○	**Take online orders, if you aren't already** — Take your customer on the journey from product research to purchase and online payment, all on your website.		
○	**Go paperless and use saved time to find new customers** — Use programs, such as Salesforce and Infor CRM, that organize customer information for you.		
○	**Improve speed-of-sales process and operating efficiency** — Analyze operating processes for bottlenecks.		

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