

**Lean Sales & Marketing Key Questions Guide**

## 1 – The Business

* Do you plan to grow in the next 1-3 years? If so how much?
* What are your top goals/objectives in the next 12 months?
* What is your greatest obstacle to reaching your objectives?

## 2 – Market Positioning

* What is your key market positioning statement?
* What is your most important line of business/product/service?
* Why do you win business – what is your unique selling proposition)?

## 3 – Route to Market

* How do you serve customers? Direct | Dealers/Resellers | Distributors
* What are your most effective sales/marketing activities? Digital | Trade Shows | Outside Sales | Inside Sales | Other
* What marketing opportunities have you not yet explored?

## 4 – Sales Approach

* Where do your marketing/salespeople spend the majority of their time?
* What is your high-level marketing/sales process?
* What delays your sales cycle most – what step in your sales process causes delays?

## 5 – Processes

* Have you implanted Lean in your organization? What areas?
* Do you have an updated value stream map?
* Do you know what processes have the most room for improvement? Have you quantified their current cost?
* Can you track ROI on sales/marketing spend?

## 6 – Systems

* What systems do you have today? Digital Marketing | Email Marketing | CRM | Phones
* Do your systems talk to each other today?
* Do people fully utilize the systems you have today? If not, why?