

B2B SALES SYSTEM IMPLEMENTATION

Sales System Scorecard Self-Assessment

Find out where your sales process stands. See the fastest way to stop being the bottleneck. Use the FORWARD STATE Sales Framework to find your clearest path forward.

THE FORWARD STATE SALES FRAMEWORK

F	O	R	W	A	R	D
Focus the Fit	Organize the Pipeline	Record the Right Data	Work the Plan	Automate the Busywork	Review Results Weekly	Document to Delegate
Target the right buyers	Track deals clearly	Keep clean, useful records	Reach out consistently	Save time with smart tools	Fix problems early	Build a system that runs without you

7 Dimensions · 28 Questions · Instant Scoring Guide

WHO THIS IS FOR:

For Founders and Owners who need a repeatable sales system - not more advice. We set up buyer-fit rules, pipeline stages, CRM fields, outreach sequences, scripts, and a weekly scorecard so your pipeline runs without you driving every deal. You leave with working tools.

HOW TO USE THIS ASSESSMENT

A Diagnostic Tool for Founders and Owners

This self-assessment follows the FORWARD STATE Sales Framework - the seven-step method behind the **Forward State Sales System**. Each section covers one part of a complete, repeatable sales process.

Most Founders and Owners find that they score high in one or two areas and low in others. That's normal. The goal isn't perfection - it's clarity. Knowing exactly where your system is weak tells you where to focus first.

DOES THIS SOUND FAMILIAR?

You are the bottleneck

Deals close when you're in the room, stall when you're not.

Ad-hoc processes

Your current approach works sometimes - but it can't be taught, repeated, or handed to anyone else.

Revenue depends on referrals

To grow, you need a steady outreach plan, not just word-of-mouth and warm introductions.

No repeatable playbook

Every deal feels like improvisation. There's no documented process a future hire could learn from.

Not ready to hire

You feel pressure to bring on sales help - but there's no system for them to follow.

Scaling feels impossible

You know you need to remove yourself from every deal, but there's no structure to make that safe.

If any of those resonate, this assessment will show you exactly which parts of your sales system need work - and in what order.

INSTRUCTIONS

For each statement, circle or write the number that best reflects your current situation - **not where you aspire to be**, but where things actually stand today. Be honest. The more accurate your answers, the more useful your score.

1 = Strongly Disagree

2 = Disagree

3 = Neutral

4 = Agree

5 = Strongly Agree

SECTION 1 OF 7 - FORWARD STATE SALES FRAMEWORK

F	<h2 style="margin: 0;">Focus the Fit</h2> <p style="margin: 0;">Goal: Stop chasing bad-fit deals and focus on buyers worth winning.</p>
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1=Never 3=Sometimes 5=Always

1. We have a written description of our best-fit customers, including their industry, size, and how they buy.

1	2	3	4	5
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2. We use our “best-fit” description to filter out weak leads before wasting time on them.

1	2	3	4	5
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3. We can instantly tell the difference between a 'perfect' lead and a 'maybe', and we treat them differently.

1	2	3	4	5
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4. We have walked away from at least one deal in the last 90 days because it was a bad fit for our business.

1	2	3	4	5
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Section subtotal _____ / 20

SECTION 2 OF 7 - FORWARD STATE SALES FRAMEWORK

O

Organize the Pipeline

Goal: Create clear steps so deals stop drifting or stalling

1=Never 3=Sometimes 5=Always

5. Our sales process has clear milestones that tell us exactly when a deal is ready to move forward.

1	2	3	4	5
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6. Every deal in our records has a clear next step, an owner, and a due date.

1	2	3	4	5
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7. We can look at our deal list at any moment and know which ones will likely close in the next 60 days.

1	2	3	4	5
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8. We either move a deal forward or close it out; we don't let old deals sit and clutter the pipeline.

1	2	3	4	5
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Section subtotal _____ / 20

SECTION 3 OF 7 - FORWARD STATE SALES FRAMEWORK

R

Record the Right Data

Goal: Capture only the information that helps you make decisions.

1=Never 3=Sometimes 5=Always

9. Our records include only the essential information we need, without any extra clutter.

1 2 3 4 5

10. Our records are clean enough that we actually trust them for planning and forecasting.

1 2 3 4 5

11. We record the important details of every call so anyone on the team can pick up where we left off.

1 2 3 4 5

12. We have simple rules to keep our records clean, and we actually follow them..

1 2 3 4 5

Section subtotal _____ / 20

SECTION 4 OF 7 - FORWARD STATE SALES FRAMEWORK

W

Work the Plan

Goal: Follow a repeatable outreach plan with a single, clear goal for every contact

1=Never 3=Sometimes 5=Always

13. We follow a written plan for reaching out to prospects across email, phone, and LinkedIn.

1	2	3	4	5
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14. Every message we send has one clear "ask" rather than multiple confusing requests

1	2	3	4	5
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15. Our messages speak directly to the specific problems our target audience wants to solve.

1	2	3	4	5
---	---	---	---	---

16. We track how many people reply and test different messages to see what gets the best results

1	2	3	4	5
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Section subtotal _____ / 20

SECTION 5 OF 7 - FORWARD STATE SALES FRAMEWORK

A

Automate the Busywork

Goal: Automate repetitive tasks and keep the human touch for the high-value steps.

1=Never 3=Sometimes 5=Always

17. The system handles our reminders and follow-ups, so nothing falls through the cracks.

1 2 3 4 5

18. We have clear rules about what the system handles versus what requires a human.

1 2 3 4 5

19. Our automation saves us time without making our messages look like spam.

1 2 3 4 5

20. We have checked our automated tools in the last 60 days to make sure they are working right

1 2 3 4 5

Section subtotal ____ / 20

SECTION 6 OF 7 - FORWARD STATE SALES FRAMEWORK

R

Review Results Weekly

Goal: Use a consistent scorecard to find bottlenecks before they cost you deals.

1=Never 3=Sometimes 5=Always

21. Every week, we check how many people we contacted and how many meetings we booked.

1 2 3 4 5

22. We use a simple scorecard or dashboard consistently, rather than just relying on gut feelings

1 2 3 4 5

23. When our numbers go down, we have a clear plan to find and fix the problem

1 2 3 4 5

24. Our weekly review drives real decisions on what we do differently the following week.

1 2 3 4 5

Section subtotal ____ / 20

SECTION 7 OF 7 - FORWARD STATE SALES FRAMEWORK

D

Document to Delegate

Goal: Turn your best moves into a guide so the system can run without you.

1=Never 3=Sometimes 5=Always

25. Our sales tasks are written down clearly enough that someone else could do them for us.

1	2	3	4	5
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26. A new hire could start producing results in their first two weeks just by following our guide.

1	2	3	4	5
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27. All our templates, scripts, and success stories live in one organized, easy-to-find place.

1	2	3	4	5
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28. I have handed off at least one repeatable sales task to a person or a tool in the last 90 days.

1	2	3	4	5
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Section subtotal _____ / 20

YOUR NEXT STEPS

- 1. Look for the Pattern:** A low score in **Focus the Fit** means your foundation is unclear. A low score in **Document to Delegate** means you are still the bottleneck.
- 2. Take One Action:** Use an "Action This Week" guide to fix your lowest-scoring area first.
- 3. Get a Peer Review:** Book a Review Call for a genuine assessment of what to build first.

DIMENSION	YOUR SCORE	PRIORITY LEVEL
F - Focus the Fit	_____ / 20	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low
O - Organize the Pipeline	_____ / 20	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low
R - Record the Right Data	_____ / 20	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low
W - Work the Plan	_____ / 20	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low
A - Automate the Busywork	_____ / 20	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low
R - Review Results Weekly	_____ / 20	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low
D - Document to Delegate	_____ / 20	<input type="checkbox"/> High <input type="checkbox"/> Med <input type="checkbox"/> Low

REAL RESULT -- Response Rate Result: Project Management Training Provider, Professional Services, under 10 employees "Rob came to us with 15 years of alumni relationships sitting dormant in a spreadsheet and no system for activating them. Within 13 weeks we built a warm referral engine inside Zoho CRM, loaded 3,800 contacts, and ran the first campaign. Direct message response rate: 100%. Industry benchmark for warm LinkedIn outreach is 10%. He now runs the entire system independently in under 2 hours per week."

YOUR LOWEST SCORE IS YOUR STARTING POINT

One action for each dimension you can take this week:

Dimension	Action This Week
F - Focus the Fit	Write one sentence that describes your single best client - industry, size, trigger event, and why they bought. That's the seed of your Ideal Customer Profile.
O - Organize the Pipeline	Open your records and archive every deal with no documented next step and no activity in 30 days. What remains is your real pipeline.
R - Record the Right Data	Count how many fields you have in your records. If it's more than 15, you have clutter. Identify the 5 fields that actually change your decisions and make those mandatory
W - Work the Plan	Write out your current outreach sequence from memory. If you can't, you don't have one - you have habits. That's the gap to close first.
A - Automate the Busywork	List every task you did manually in sales this week. Circle anything you did the same way twice. That's your first automation candidate.
R - Review Results Weekly	Pick three numbers to track next week - outreach sent, replies received, meetings booked. That's your first scorecard.
D - Document to Delegate	Choose one sales task and write down every step as if explaining it to someone on their first day. If you can't, it isn't documented - it's memorized.

REAL RESULT – Time Reclaimed Result: B2B Workshop Delivery, Education Sector, BC "200 to 400 hours per year were being lost to unqualified inbound inquiries before we installed a qualification framework and CRM workflow. By Week 13, that time was reclaimed, the pipeline was visible, and a 50-page playbook meant the system could run without the founder in every conversation."

SCORING GUIDE

What Your Score Means

Add your seven section subtotals:	$\underline{\quad} + \underline{\quad} + \underline{\quad} + \underline{\quad} + \underline{\quad} + \underline{\quad} + \underline{\quad} = \underline{\quad} / 140$
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SCORE	TIER	WHAT IT MEANS	RECOMMENDED NEXT STEP
28–56 (Low)	Foundation Gap	Your sales activity has no set pattern yet. There is no repeatable structure, and growth depends on your personal effort and referrals.	Book a No-Fee Review Call. You are likely a fit for the Core tier implementation.
57–84 (Mid)	Partial System	Some pieces are in place, but key parts are missing or not written down. Growing or hiring would be too early without closing the gaps.	Identify your 2–3 lowest-scoring areas. These are your best starting points.
85–112 (High)	Structured & Scalable	You have a working system. The focus now is strengthening, handing off, and growing what already works.	Consider the Foundation to Scale engagement for Systems Hardening and independent operation.
113–140 (Peak)	Sales-Ready Organization	Your system is documented, repeatable, and hire-ready. You have a compelling Sales System.	Validate with a peer review or engage Forward State Sales Systems for a Scorecard Audit.

REAL RESULT – Mindset and System Shift Result: Technical Founder, Professional Training, Canada "Week 1: 'I'm a professor, not a salesperson.' Week 13: executing daily outreach, managing referrals, logging CRM activity, and coaching alumni on ideal referral profiles -- independently. The shift wasn't personality. It was structure."

READY TO BUILD YOUR SYSTEM?

Book a Review Call

A structured 1-hour virtual call to assess where your sales system stands and what to build first. Not a pitch. A genuine mutual assessment.

WHAT HAPPENS

During the Call	After the Call (within 24 hrs)	Follow-Up Call
1-hour structured virtual call to review your sales system, your goals, and your aspirations.	Within 24 hours you receive a written summary: your three lowest-scoring areas, what to fix first, and a clear recommendation -- including an honest 'not yet' if that's what you need to hear.	15-minute call to review findings, answer questions, and discuss whether the Forward State Sales System is a fit.

No fee · No pressure · Honest "not yet" recommendations

Book online:

calendar.app.google/DTvUo4kFWJKUsfB36

or email:

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"You don't need a personality transplant. You need structure you can run and repeat."

Alan Clark · Sales System Lead, Forward State Sales Systems