



MONTGOMERY, INC.

Sales System Audit

Identify What's Holding Your Sales Team Back and Fix It

A clear, objective diagnostic that shows where your sales system is breaking down and what to do next.

The Sales System Audit is a targeted, end-to-end assessment designed to evaluate how effectively your sales organization converts effort into revenue. It provides leaders with a clear, data-driven view of what's working, what isn't, and where to focus to improve performance, forecasting, and growth.

This is not a generic assessment. It's a practical roadmap for building a stronger, more predictable sales engine.

What This Audit Is Designed to Do

The Sales System Audit helps organizations:

- Identify bottlenecks and inefficiencies slowing revenue growth
- Clarify gaps in sales process, structure, and execution
- Evaluate team performance and productivity
- Assess lead quality and conversion effectiveness
- Improve forecasting accuracy and accountability

The result is clarity—and a plan.

What the Audit Evaluates

The Sales System Audit examines your sales operation across multiple critical dimensions, including:

- Sales process clarity and stage effectiveness
- Team productivity, skill gaps, and quota performance
- Lead generation volume, quality, and conversion
- CRM setup, data hygiene, and reporting discipline
- Messaging, positioning, and pricing conversations
- Buyer experience and handoffs across the customer journey
- Roles, compensation alignment, and accountability

Each area is reviewed using structured criteria to surface misalignment, inefficiency, and opportunity.

How the Audit Works

The audit takes a comprehensive look at how your sales system operates today—strategy, process, people, and tools. Findings are evaluated objectively to determine where effort is being lost and where improvements will have the greatest impact.

Rather than overwhelming teams with recommendations, the audit separates quick wins from structural improvements, helping leaders prioritize actions that drive results.

What You Receive

- An objective assessment of your current sales system
 - Clear visibility into what's limiting performance
 - A prioritized action plan with recommended owners
 - Timelines and success metrics for each initiative
 - A practical blueprint for improving execution and forecasting
-

Who This Audit Is For

- Organizations experiencing stalled or inconsistent sales growth
 - Leaders who lack visibility into what's really happening in sales
 - Teams struggling with forecasting accuracy or execution
 - Companies preparing to scale or restructure their sales function
-

The Result

Clear insight. Focused action. Stronger performance.

The Sales System Audit gives leadership a straightforward blueprint to reduce friction, improve execution, and scale revenue with confidence.