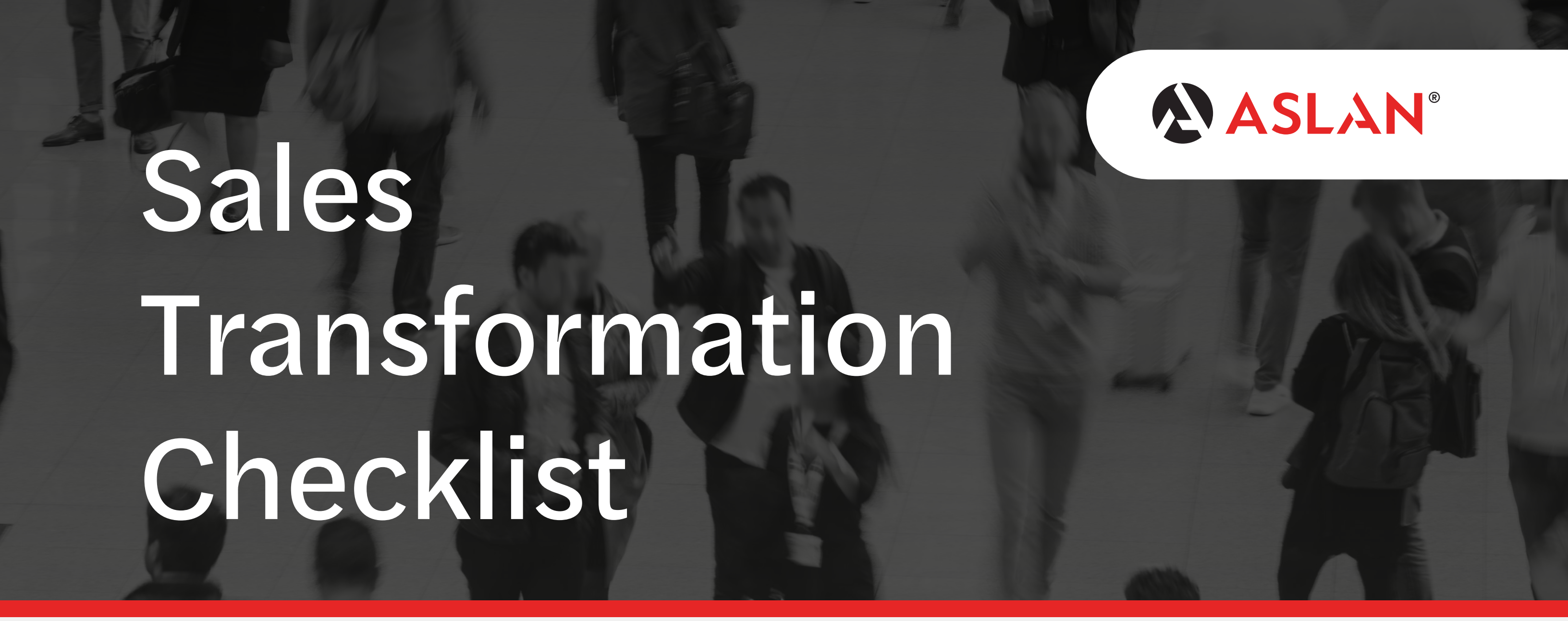

Sales Transformation Checklist

Phase I: Prepare

Checklist	Description	Tools & Tips
	Step I: Assessment	
Barriers to change	Conduct focus to determine readiness, emotional resistance, philosophical alignment, and perceived need for training/ development.	Work with a subset of representatives. Sample 5 to 10 reps or managers from each unique sales organization.
Capability Assessment	Determine the level of capabilities for both the reps (one-to-one & strategic) and the front-line leaders (Lead, Manage & Coach)	Leverage AI tools to identify targeted calls with prospects/ customers & determine gaps.
Coaching Cadence	Determine the current cadence for leaders to observe and work with team members one-on-one to develop skills/capabilities.	If the coaching cadence is low, determine barriers.

Step II: Alignment Meeting		
Why Change?	Answer the question of the overriding purpose of the change initiative – serve the company or serve the customer? What will be communicated to the organization?	Connecting the strategy to serving the customer will result in increased loyalty/profits, higher field engagement, and top-line revenue.
Decisions	Work with key stakeholders to determine learning priorities, an approach to selling, and a method for measuring training impact.	Leverage the Kirkpatrick Model as a guide.
Sr. Leadership's Role in Sustainment	Clearly map out the resources, organizational changes, and time commitment needed from key stakeholders.	Use actual transcripts to foster emotional and financial support for the initiative.
Step III: Customize		
Develop Resources	Create examples, labs, and content relevant to each role.	Leverage AI tools (conversational intelligence) to identify examples and exercises for training.
Validate	Run pilot program, and test content and models to ensure effectiveness.	Include key stakeholders from each level in the organization.
Integrate into CRM	To drive adoption, embed frameworks into your CRM system. As they utilize helpful tools, training is reinforced.	Key content: Discovery framework, Relational Map of all "players," and opportunity assessment tool.

Phase II: Ignite

Checklist	Description	Tools & Tips
	Step I: Workshop	
Embrace	Content should be built at the beginning of every critical component of training to ensure participants understand why it is in their best interest to change.	Utilize movie clips, simulations, principles, visuals, and research to tell the story.
Experience	Before moving to execution, provide role-specific examples to bring the content to life.	Leverage AI tools to identify good and bad examples.
Execute	Develop labs and exercises to practice. Ensure they are relevant to the role and real-world opportunities.	As part of pre-work, have participants identify key accounts/opportunities to be used during the workshop.
	Step II: Evaluate	
Content	Ask participants to rate content – relevancy, impactful, easy to follow, meets/exceeds expectations – on a scale of 1 to 5.	Utilize tools like SurveyMonkey & Mentimeter to efficiently capture survey results.
Delivery	Ask participants to rate content – relevancy, impactful, easy to follow, meets/exceeds expectations – on a scale of 1 to 5.	

NPS (New Promoter Score)	On a scale of 1 to 10, how likely will they be to recommend the program to a colleague (subtract scores 1-6, neutral 7-8, and 9-10 are promoters)?	
Rated Skill Improvement	Ask participants to rate their proficiency pre- and post-workshop in all critical areas of the program.	

Phase III: Transform

Checklist	Description	Tools & Tips
Step I: Comprehend		
Develop Microlearning by Discipline	To reinforce key concepts, create a library of content for each unique discipline (e.g., responding to objections). The library should include videos, examples, practice, and selling resources.	Allego, Mindtickle, & ASLAN's platform Renue are resources available to reinforce core selling disciplines.
Assess Knowledge	Test to ensure knowledge comprehension.	Leverage AI tools such as QStream to drive learning and recognize and direct learning to knowledge gaps.
Step II: Apply		
Implement Productivity Tools	Improve efficiency by adopting productivity tools that assist sellers in research, remove mundane tasks, and improve outreach.	A plethora of AI tools are available to assist sellers (e.g., Zoominfo/Chorus, Outreach, SalesLoft, Salesforce Einstein, FireFlies, Otter)
Align Sales Enablement Resources to Capabilities/ Disciplines	Provide sales enablement resources at the point of need (think vending machine vs. eLearning), making it intuitive to the sellers.	Allego, Mindtickle, & ASLAN's platform Renue are resources available to reinforce core selling capabilities and disciplines.

Step III: Master		
Certify Leaders	Implement a 3-cycle intensive support for frontline leaders, equipping them to drive culture and change. At the end of the process, leaders are measured by their ability to diagnose performance gaps, coach, and execute a development plan.	Divide into cohorts of 5 to 10 leaders to promote peer learning and improve results.
Diagnose Gaps	Build processes and KPIs to promote ongoing, consistent assessment of the team's ability to execute.	Offer diagnostic tools to coaches and AI tools (conversational intelligence) such as Gong and HubSpot Sales Hub to assist sales force assessment.
Develop the Team	Practice, practice, practice is the key to driving transformation. Coaching sellers to master a new set of competencies requires a rigorous skill development process. Remove the greatest barriers to coaching – time and desire to change. Learn more with ASLAN's QuadCoaching™ Micro-Workshop.	To drive change, utilize AI simulations (ChatGPT mobile, RNMKR) and a library of skills development activities (SDA) organized around each discipline.
Measure in 4D	The most comprehensive and insightful approach to measuring an organization's progress is to focus on four dimensions: Results, Desire, Productivity & Capabilities. These are the Four Dimensions that drive performance.	To measure in 4D, the frontline leaders, AI-driven data, and the CRM need to work harmoniously together.