

Hotel Sales Audit

Evaluation of Sales Systems & Staff Effectiveness

**Hotel Sales Manager
City, State**

**Jeff Coy
President
JLC Hospitality Consulting**

Dates

Hotel Sales Audit: Evaluation of Sales Systems & Staff Effectiveness

Section	#	Points of Evaluation				Quality Rating
OVERALL	1.1	Does the sales manager understand his/her sales office objectives?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	2.1	Is sales manager targeting the right customer segments in terms of ROI?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	2.2	Is sales manager targeting the right prospective accounts within those segments?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	3.1	Is sales manager effectively managing time and territory to maximize production?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	3.2	Is the sales office large enough to accomplish the objectives?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	3.3	Is the sales office organized?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	4.1	Does sales office compensation program provide adequate incentive and reward?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	5.1	Does sales office staff show high moral, ability and effort?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10

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Section	#	Points of Evaluation	Quality Rating												
ADEQUACY OF HOTEL SALES PERFORMANCE EVALUATION	6.0	How adequate is the 6-Point system for setting sales office goals and evaluating performances?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	6.1	Budget management?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	6.2	Completion of 80 Sales Calls per month?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	6.3	Leads generated: 80 per month?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	6.4	Annual revenue increase of Top 100 Travel Agency in territory?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	6.5	Group room night quota?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	6.6	Office administration: timely, accurate reports													

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Section	#	Points of Evaluation	Quality Rating												
EFFECTIVENESS OF SALES METHODS	7.1	Is the sales manager using effective methods to prospect, qualify, make sales presentations and book business into the hotel?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	7.2	Is the sales manager using effective methods to report sales production to headquarters?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	7.3	What is the quality of the account database and contact management system?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10

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Section	#	Points of Evaluation				Quality Rating
KNOWLEDGE OF ACCOUNTS	8.1	Does the sales manager know every account's total room night volume?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	8.2	Does the sales manager know every account's room night volume for different priced hotels	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	8.3	Does the sales manager know the hotel's share of volume for every account?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	8.4	Does the sales manager know each competitor's share of each account?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	8.5	Does the sales manager have an account history for each account?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	8.6	Does the sales manager have an account profile for each account?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	8.70	Does the sales manager have a profile on every account decision-maker?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10

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Section	#	Points of Evaluation	Quality Rating												
TIME & TERRITORY MANAGEMENT	9.1	Does the sales manager provide adequate sales-service coverage in territory?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10

Hotel Sales Audit: Evaluation of Sales Systems & Staff Effectiveness

Section	#	Points of Evaluation	Quality Rating												
EFFECTIVENESS OF BOOKING METHODS	10.1	Does the sales manager have an effective method of booking business into the reservation system?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	10.2	Does the sales manager have an effective method of booking business into the member hotels?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10

Hotel Sales Audit: Evaluation of Sales Systems & Staff Effectiveness

Section	#	Points of Evaluation				Quality Rating
PRODUCTIVITY RATIOS	11.1	Are the goals and territory appropriate for this sales office?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	11.2	How can this sales office maximize revenues?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	11.3	What resources are required maximize revenues?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	11.4	Average number of sales calls per person per month	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	11.5	Average revenue produced per sales call	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	11.6	Average cost per sales call	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	11.7	T&E cost per sales call	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	11.8	Average number of rooms sold per sales call	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	11.9	Number of new accounts opened per month	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	11.10	Annual sales office cost as % of total revenues booked	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	11.11	Face to face sell time as % of total available time	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	11.12	What is the sales ratio for this sales manager?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	11.13	What is the cost vs revenue from Top 100 TAs in this territory?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	11.14	What is the cost vs revenue from Group Tour Producers in this territory?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	11.15	What is the cost vs revenue from Individual Tour Producers in this territory?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10

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Section	#	Points of Evaluation	Quality Rating												
SALES STAFF EFFECTIVENESS	12.1	Does the sales manager have the 5 Basic Skills to be a Average Salesperson? Score 1 to 8.	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	12.2	COLLECTS INFORMATION: Ability to collect a wide range of facts and bring them to bear on the sale?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	12.3	COMMUNICATE EFFECTIVELY: Ability to make short, clear, effective presentations?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	12.4	PERSONAL SENSITIVITY: Awareness of other people's feelings and how they are communicated?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	12.5	VERSATILITY IN RELATIONSHIPS: Ability to build relationships with different kinds of people?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	12.6	TECHNICAL KNOWLEDGE: Ability to understand and discuss technical matters about the industry, management, products and services?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	12.7	Does the sales manager have the 8 Extra Skills to be an Outstanding Salesperson? Score 1 to 8.	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	12.8	FOCUSED ON ACHIEVEMENT: Ability to keep attention focused on the sale?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	12.9	TIME PRODUCTIVITY: Makes productive use of all available time?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	12.10	SEIZES OPPORTUNITIES: Takes initiative to create business by finding new ways.	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	12.11	STRATEGIC INFLUENCE: Ability to network in order to influence key people?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	12.12	FOCUSED PERSUASION: Ability to condense key points for a maximum impact sales presentation?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	12.13	ENHANCES PERSONAL IMPACT: Ability to enhance his/her image as respected leader and authority?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	12.14	USE ALL RESOURCES TO IMPACT SALES: Ability to understand his/her role in the work place and the corporate political structure and use the sustem to impact the selling process?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
12.14	QUICK THINKING: Ability to think on his/her feet and interpret signals from the customer to diagnose the buying situation?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10	

Hotel Sales Audit: Evaluation of Sales Systems & Staff Effectiveness

Section	#	Points of Evaluation	Quality Rating												
ADEQUACY OF THE HOTEL SALES PLAN	13.1	Does the hotel sale plan identify the hotels in the competitive supply?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	13.2	Does the hotel sales plan show the total competitive supply of hotel room nights and the hotel's share of that supply?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	13.3	Does the hotel sales plan show the total competitive demand for hotel room nights and the hotel's share of that demand?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	13.4	Does the hotel sales plan show the hotel's penetration of overall demand?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	13.5	Does it show the hotel's penetration of demand by customer segment?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	13.6	Does the hotel sales plan explain why certain hotel competitors receive more or less than their fair share of the Group Business, Group Leisure, Individual Business and Individual Leisure customer segments?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	13.7	Does the hotel sales plan forecast expected supply and demand growth in each customer segment?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	13.8	Does the hotel sales plan mention the competitive hotel practices being used in each customer segment?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	13.9	Does the hotel sales plan discuss what strategies are required by the hotel to out-perform certain competitors in each customer segment?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	13.10	Does the hotel sales plan show that sales priorities are set and resources are allocated based on the hotel's penetration of demand?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10

Hotel Sales Audit: Evaluation of Sales Systems & Staff Effectiveness

Section	#	Points of Evaluation				Quality Rating
ADEQUACY OF PLANNED SALES EXPENSES	14.1	Does the sales plan show action calendars with task assignments and an estimate of costs?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	14.2	Does the sales plan show the amount being invested in each customer segment?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	14.3	Does the plan show a 12 month line item marketing expense budget?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	14.4	Does the sales plan compare sales expenses with revenues generated?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	14.5	Does the sales plan show sales expenses appropriate to funding the tasks?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	14.6	Do the tasks support the sales strategies? Do strategies support the objectives?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10

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Section	#	Points of Evaluation	Quality Rating												
SALES MANAGEMENT, MEASUREMENT & EVALUATIONS	15.1	Does the hotel sales plan show the return expected from investing sales efforts and money into each customer segment?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	15.2	Does the hotel sales plan explain what it will measure?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	15.3	Does the hotel sales plan show its revenue mix?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	15.4	Does the hotel sales plan show its room revenues by customer mix?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	15.5	Does the hotel sales plan show revenues by Volume Accounts?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	15.6	Does the hotel sales plan show revenues by geography?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	15.7	Does the hotel sales plan show the hotel's market share and penetration of demand?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	15.8	Does the plan measure the effectiveness of the sales function?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	15.9	Does the hotel sales plan mention Annual Sales Meetings?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	15.10	Does the hotel sales plan mention Quarterly Reviews of the Sales Teams?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	15.11	Does the hotel sales plan mention any Sales Audit recommendations?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10

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Section	#	Points of Evaluation				Quality Rating
PRESENTATION OF HOTEL SALES PLAN	16.1	Does the hotel sales plan have an Executive Summary under 20 pages?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	16.2	Is the Executive Summary in a presentation format using audio-video?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	16.3	Does the hotel sales plan show a schedule of presentations to the board of directors, annual convention, district & state meetings, corporate executives, reservation centers and all employees ?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	16.4	Does the hotel sales plan show the signature of the Hotel CEO indicating approval to implement the hotel's hotel sales plan & expense budget?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	16.5	Does the hotel sales plan include a capital expenditures/technology budget?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	16.6	Does the hotel sales plan show the signature of the Hotel CEO indicating approval to implement the capital improvements/technology upgrades?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10

International Sales Office Audit

Evaluation of Hotel Chain's International Sales Offices

Sales Person
Location

Jeff Coy
President
JLC Hospitality Consulting

Date

Hotel Chain's International Sales Office Audit: Evaluation of Location

Section	#	Points of Evaluation				Quality Rating
	1.1	Does the sales manager understand his/her sales office objectives?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	2.1	Is sales manager targeting the right customer segments in terms of ROI to BWI?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	2.2	Is sales manager targeting the right prospective accounts within those segments?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	3.1	Is sales manager effectively managing time and territory to maximize production?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	3.2	Is the sales office large enough to accomplish the objectives?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	3.3	Is the sales office organized?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	4.1	Does sales office compensation program provide adequate incentive and reward?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	5.1	Does sales office staff show high moral, ability and effort?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10

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Hotel Chain's International Sales Office Audit: Evaluation of Location

Section	#	Points of Evaluation				Quality Rating
	6.0	How adequate is the 6-Point system for setting sales office goals and evaluating performances?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	6.1	Budget management?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	6.2	Completion of 80 Sales Calls per month?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	6.3	Leads generated: 80 per month?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	6.4	Annual revenue increase of Top 100 Travel Agency in territory?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	6.5	Group room night quota?	Y	N	N/A	1 2 3 4 5 6 7 8 9 10
	6.6	Office administration: timely, accurate reports				

Hotel Chain's International Sales Office Audit: Evaluation of Location

Section	#	Points of Evaluation	Quality Rating												
	7.1	Is the sales manager using effective methods to prospect, qualify, make sales presentations and book business into member hotels?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	7.2	Is the sales manager using effective methods to report sales production to headquarters?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	7.3	What is the quality of the account database and contact management system?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	8.1	Does the sales manager know every account's total room night volume?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	8.2	Does the sales manager know every account's mid-priced room night volume?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	8.3	Does the sales manager know the Chain's share of mid-priced volume for every account?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	8.4	Does the sales manager know each competitor's share of each account?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	8.5	Does the sales manager have an account history for each account?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	8.6	Does the sales manager have an account profile for each account?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	8.70	Does the sales manager have a profile on every account decision-maker?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10

	9.1	Does the sales manager provide adequate sales-service coverage in territory?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	10.1	Does the sales manager have an effective method of booking business into the reservation system?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	10.2	Does the sales manager have an effective method of booking business into the member hotels?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	11.1	Are the goals and territory appropriate for this sales office?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	11.2	How can this sales office maximize revenues?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	11.3	What resources are required maximize revenues?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	11.4	Average number of sales calls per person per month	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	11.5	Average revenue produced per sales call	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	11.6	Average cost per sales call	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	11.7	T&E cost per sales call	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	11.8	Average number of rooms sold per sales call	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	11.9	Number of new accounts opened per month	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	11.10	Annual sales office cost as % of total revenues booked	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	11.11	Face to face sell time as % of total available time	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	11.12	What is the sales ratio for this sales manager?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	11.13	What is the cost vs revenue from Top 100 TAs in this territory?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	11.14	What is the cost vs revenue from Group Tour Producers in this territory?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	11.15	What is the cost vs revenue from Individual Tour Producers in this territory?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10

Hotel Chain's International Sales Office Audit: Evaluation of Location

Section	#	Points of Evaluation	Quality Rating												
	12.0	Does the sales manager have the 5 Basic Skills to be a Average Salesperson? Score 1 to 8.	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	12.1	COLLECTS INFORMATION: Ability to collect a wide range of facts and bring them to bear on the sale?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	12.2	COMMUNICATE EFFECTIVELY: Ability to make short, clear, effective presentations?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	12.3	PERSONAL SENSITIVITY: Awareness of other people's feelings and how they are communicated?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	12.4	VERSATILITY IN RELATIONSHIPS: Ability to build relationships with different kinds of people?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	12.5	TECHNICAL KNOWLEDGE: Ability to understand and discuss technical matters about the industry, management, products and services?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	12.6	Does the sales manager have the 8 Extra Skills to be an Outstanding Salesperson? Score 1 to 8.	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	12.7	FOCUSED ON ACHIEVEMENT: Ability to keep attention focused on the sale?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	12.8	TIME PRODUCTIVITY: Makes productive use of all available time?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	12.9	SEIZES OPPORTUNITIES: Takes initiative to create business by finding new ways.	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	12.10	STRATEGIC INFLUENCE: Ability to network in order to influence key people?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	12.11	FOCUSED PERSUASION: Ability to condense key points for a maximum impact sales presentation?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	12.12	ENHANCES PERSONAL IMPACT: Ability to enhance his/her image as respected leader and authority?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
	12.13	USE ALL RESOURCES TO IMPACT SALES: Ability to understand his/her role in the work place and the corporate political structure and use the sustem to impact the selling process?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10
12.14	QUICK THINKING: Ability to think on his/her feet and interpret signals from the customer to diagnose the buying situation?	Y	N	N/A	1	2	3	4	5	6	7	8	9	10	