CHECKLIST

Sales Training *Measurement*

Sales training is a strategic lever for growth. But to prove its ROI, you need to measure both how well the training was received and how it translates into performance.

Use this checklist to ensure your sales training program is aligned to meaningful lead and lag metrics, supported by strong tracking systems, and set up for long-term success.

PRE-TRAINING SETUP

- ☐ Have we defined the business objectives driving this training?
- ☐ Are metrics aligned with training content and desired behavior change?
- ☐ Have we confirmed our ability to track the chosen metrics?
- ☐ Are systems (CRM, LMS) in place to capture baseline data before rollout?
- ☐ Have we selected 3 lead and 3 lag metrics aligned to our objectives?

Lead Indicators

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Lag Indicators

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Sample Indicators

Explore additional measures →

LEAD MEASURES

Predictive, behavior-based measures that signal whether training is being adopted and integrated into daily sales activity.

1. Sales skill progress / certification
2. Sales rep activity (e.g., outbound activity)
3. Presentations delivered
4. Lead conversion rate
5. Customer feedback
6. Product knowledge
7. # account plans completed
8. # of observed sales calls
9. # of coaching sessions

LAG MEASURES

Outcome-based measures that reflect the impact of training on business performance.

1. Sales revenue
2. % quota attainment
3. Customer acquisition cost (CAC)
4. Average revenue per seller
5. Length of sales cycle
6. Customer retention / churn rate
7. Lead to close ratio
8. Net Promoter Score (NPS)
9. % account growth

TRACKING

Lead Indicators – Behavior in Motion

- ☐ Are we tracking lead indicators identified on the previous page?
- ☐ Are sellers completing the prescribed tools (e.g., Sales Conversation/Opportunity Planner)?
- ☐ Is there observable behavior change (via roleplays, ride-alongs, or AI tools)?
- ☐ Are managers observing and coaching to specific new behaviors?

Lag Indicators – Business Impact

- ☐ Are we tracking lag indicators identified on the previous page?

STAKEHOLDER ALIGNMENT

- ☐ Has leadership agreed on success milestones (30/60/90-day checkpoints)?
- ☐ Do managers have coaching guides tied to the training content?
- ☐ Are pilot goals clearly defined (baseline vs. stretch)?
- ☐ Has a cadence for reporting and course correction been set?

ENABLEMENT AND OPTIMIZATION

- ☐ Is a dashboard or reporting tool in place for visualizing progress?
- ☐ Are confidence surveys or task clarity checks included?
- ☐ Do we have a plan to adjust KPIs if business conditions evolve?
- ☐ Have we embedded expectations into ongoing coaching?

NEXT STEPS

- ☐ Review metrics with team at 30/60/90-day intervals
- ☐ Celebrate early wins and iterate based on performance data
- ☐ Use insights to scale or evolve training for broader rollout

Discover how AI can help you ***measure learning outcomes*** ⟶