Hotel Annual Sales Audit

Date:

General Manager:		Reviewer:		Property Support for Review:	

Section Scoring Summary

	Date:		Date:		Date:		Maximum Scores for the Section	Weighting
	Score	%	Score	%	Score	%	Max Score	%
GENERAL ADMINISTRATION	0	0.00%	0	0.00%	0	0.00%	95	9%
ACCOUNT MANAGEMENT	0	0.00%	0	0.00%	0	0.00%	405	40%
REVENUE MANAGEMENT	0	0.00%	0	0.00%	0	0.00%	190	19%
BUSINESS PLAN	0	0.00%	0	0.00%	0	0.00%	130	13%
TRAINING & DEVELOPMENT	0	0.00%	0	0.00%	0	0.00%	95	9%
FIELD ACCOMPANIMENT	0	0.00%	0	0.00%	0	0.00%	100	10%

TOTAL	0		0		0		1015	
POTENTIAL DOCUMENT SCORE	1015		1015		1015			
% RESULT		0.00%		0.00%		0.00%		

AUDIT 1   AUDIT 2   AUDIT 3

GENERAL ADMINISTRATION	0.00%	0.00%	0.00%
ACCOUNT MANAGEMENT	0.00%	0.00%	0.00%
REVENUE MANAGEMENT	0.00%	0.00%	0.00%
BUSINESS PLAN	0.00%	0.00%	0.00%
TRAINING & DEVELOPMENT	0.00%	0.00%	0.00%
FIELD ACCOMPANIMENT	0.00%	0.00%	0.00%
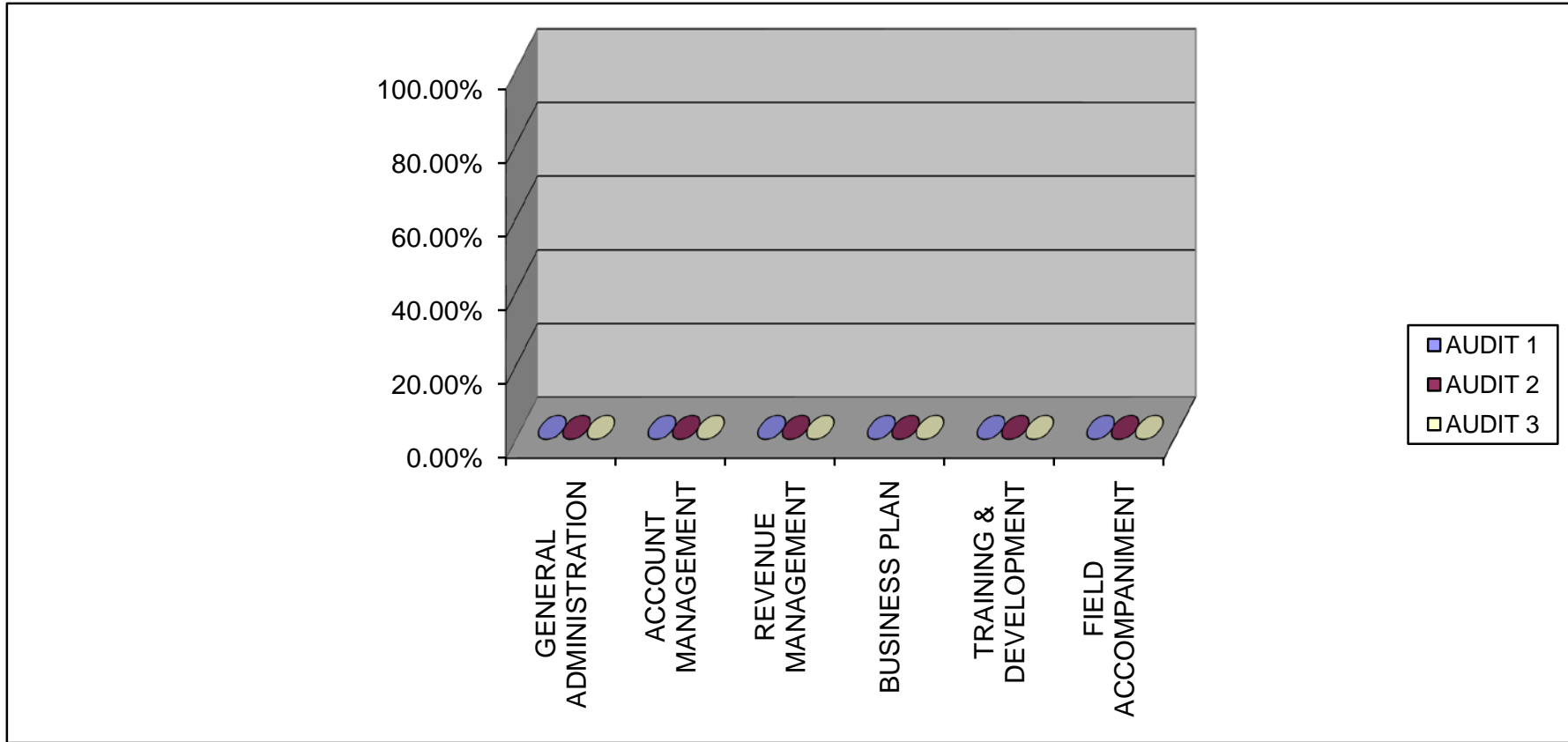
No.	Area of Review	Wt	Date	Date	Date	Assessors Comments
Section 1: General Administration						
1.01	One sales work station includes computer/laptop and telephone (voice mail), internet access, mobile phone (voice mail), correspondence trays and chair, access to Protel Terminal, Office clean and in good state of repair, dedicated filing cabinet and shelves.	5				Dial mobile phone voice mail to ensure up to date with a clear message. Dial office telephone to check pick up response and that message left is clear and concise.
1.02	The product knowledge file on own property is easily accessible for all sales staff. It should have property profile, menus, times of F & B outlets, fact sheets, rate structure, conference details, internal telephone listing, leisure information, Car parking , Local attractions	10				Are listed items in file and up to date
1.03	All rates and special promotions are kept in file for ease of quick reference	5				Is there a copy of winter/spring/summer/autumn promotions, account rates, F&B promotions, leisure offers. Conference & Meeting rates agreed. Summary of Rates in A-Z identifying Market Segments. Include contracted Conference Rates,
1.04	Latest copy ofXYZ Sales Reference Guide is available on hard copy or accessed on Intranet.	5				Is the latest copy available/evidence to show recently visited intranet site. Evidence of use
1.05	A - Z filing system in place	5				Yes/No, to include Conference Accounts held in the Sales Office
1.06	Standard sales letters, Sales Contracts and Email templates available on disk/system	5				Is there a copy ofCL/CVcontract, General brochure request, Conference Proposal Letter, Conference & Group Contract *STANDARD SALES CONTRACTS*
1.07	To ensure the internal referral system is in place within hotel departments and sister hotels within XYZ and all referrals are logged and outcome recorded on file. I Lead Procedures to be in place a.	5				Do Reservations/Conference and Reception have a copy of and know procedures for submitting leads. Does referral log have outcome recorded. (Visit departments to ensure copy in place). *SALES REFERRAL PROCEDURES/I-LEAD PROCEDURES*
1.08	Minimum of four quality databases have been created for selected market segments	20				Are there quality databases for key market segments within the XYZ . (5 points per database held). Max 20 points. List dates when last utilised, Outcome & Results
1.09	Latest Global/XYZ Account Listings available	5				Is the latest Global/XYZ Account Listing available and evidence of use
1.10	Monthly appointments are updated and held in Protel system ensuring access for GM and Direct Report.	5				Check Calendar for future and past 2 months appointments. Direct report able to pull activity report from Protel system
1.11	All hotel collateral or internal marketing material to be reviewed and proof read by SM/DOSM (or GM) before approving print. Ensure correct use of logo's and photography within all presentations and material, whilst adhering to brand standards	10				Have evidence folder of all artwork and promotions produced, also evidence of all PR activity having taken place. Correct use of Logos - not shrunk or stretched. Marketing Tool Kit (CD or Tool Kit via Marketing department) to be accessible in Sales Office
1.12	Is there a Chase system or follow up procedures in place for Account Management activities	10				Is there a chase system that works efficiently. Show 2 examples of using effective chase for two accounts. Via Protel
		100%				
Section Score		90	0	0	0	
Section Potential		90	90	90	90	

Section 2: Account Management						
No.	Area of Review	Wt	Date	Date	Date	Assessors Comments
2.01	Review Account File Standards	20				Find five accounts that are over 6 months old across different market segments to includePotential Analysis with a minimum of 2 contracts per company (5 points). Action plan (5 points). LCR Agreement/Contract (5 points). Correspondence in date order (5 points). NB: Multiple properties accounts will be 5 accounts per hotel. Only correspondence held for previous 2 years. Check correspondence for grammatical accuracy, spelling, layout and formats. *POT TEMPLATE; STANDARD SALES CONTRACT TEMPLATES*
2.02	Is there a Sales Platform in place and are the accounts correctly defined as Key Client (buying platform), Prospect Client (working platform), Niche Client, Suspect Client (marketing platform) Is there evidence to demonstrate conversion within the Sales Platform	50				Show evidence of the physical Sales Platform. Reviewer to ask questions to find out how the hotel determines Suspect, Prospect, Key and Niche accounts. Reviewer to spot check one account in each area of the Sales Platform, to see if they meet the criteria. Keep copies of the previous 3 months Sales Platform from the Business Plan to highlight change in the platform Show evidence trail of 2 new Suspect accounts, converted to Prospect or Key Accounts within the last 3 months - i.e. from Research/Suspect list to appointments, Client activity, monitoring business production, update action plan & SSP workbook results. *SALES PLATFORM TEMPLATE; ACTION PLANS, SSP WORKBOOK, PROSPECTING SHEET*
2.03	Show evidence of Targets and Market Share through any of the following : SSP workbook and Wish Want Walk document/SSP Document updated monthly.Show evidence of Account Plans thorough Delphi Activities or SSP Software Document. Sales Optimiser to reflect account targets,results and market share growth	40				Reviewer to check SSP Workbook is updated and that Market Share is completed .Show evidence of 3 key accounts and 2 prospect accounts to ensure there are measurable sales actions, along with targets in place. Look for Potential Analysis Update, Quarterly Review Client/Agent, Rate Negotiation/agreement. *SSP WORKBOOK DOCUMENT, QUARTERLY REVIEW TEMPLATE. SALES OPTIMISER*
2.04	Is there evidence that account activities are being undertaken and reviewed where necessary. Check Account Production on SSP Workbook and variances to target	40				Reviewer to choose 4 account files from SSP workbook that are either under producing or overproducing to see monthly sales activity has taken place. Evidence sales call reports, weekly appointments, account plans. Need evidence for minimum 1 activity from each account. Check Sales System/Delphi or manual documents.*ACCOUNT ACTIVITIES; SALES CALL SHEET; ACCOUNT PLANS; SSP WORKBOOK*
2.05	Are there two people trained and responsible for controlling the RFP's both filing and responding to deadlines via RFP express	5				Show evidence of files to check the RFP log to check the outcome section, date received, check 1 from last year and 1 from this year. Check correct procedure was followed Only correspondance for previous 2 years to be kept on file Ensure passwords are easily accessible
2.06	Ensure all property detail information is regularly updated on the RFP submissions.	5				Print off pages of last update on RFP Express screen, review information to ensure it is accurate and correct. Are Email and Contract addresses correct.
2.07	DOS/SM plus one other member of the hotel has a clear understanding of how to complete an RFP(request for proposal)	10				Check that all dealines have been met. Check these dealines using RFP Express, Identify other person nominated and trained to review and complete RFP's
2.08	Is there evidence to demonstrate that the hotel is constantly identifying new suspect accounts and results shown on any Account Production reports on leads targeted.	20				Show evidence where 5 new suspects were obtained in the last 3 months. Proof of telesales calls and sales platform variations/movement. *PROSPECTING SHEET; SALES PLATFORM*
2.09	A minimum of 30 Prospecting telesales calls per Account Manager/Sales Manager per month are achieved	30				Proof of telesales calls and account production reports/monthly tracker report. *SSP WORKBOOK/SALES OPTIMISER*
2.10	Demonstrate with 3 accounts where you had to utilise a concession to secure a piece of business	30				Provide evidence of 3 accounts (10 points for each account). E.g. Use of Wish, Want & Walk document, RFP Negotiations, Concession bank, Evidence of Appointment, activity. *WISH, WANT, WALK SPREADSHEET; SALES ACTIVITY; SALES CALL REPORT; ACCOUNT PLAN*
2.11	Joint activities take place with the XYZ Sales team including sister hotels	25				Show examples of activities held with XYZ sales team. Via Account Plans, Sales Call reports, Monthly Sales Report, Sales Activities. Check five activities (5 points for each). Ensure each activity has clear objective and outcome. Do not include account workshops/calls or sales meetings. SALES CALL TEMPLATE; MONTH END REPORT; SALES ACTIVITY REPORT

2.12	Monthly sales target of face to face sales calls to be reviewed	30				Rate according to average based on individual team members target appointments to reach monthly. Work this out pro-rata for each person being assessed. Scores: 30 Points = Team achieving or exceeding appointment levels. 20 Points = team achieving 10% under appointment target; 10 Points = team achieving 20% under appointment target. Less than 20% appointment levels being achieved NO Points. Monthly Appointment Levels agreeed with Direct Report & Job Descriptions. Based on: Sales Executive. = 10-12 appointments per week; Sales Manager = 8 - 10 appointments per week; (ADOS/DOS) = 6 - 8 appointments per week; Telesales calls = 30 calls per month Appointment Allocation: Client Appointment, Client Meeting, Showround, Coaching = 1 appointment; Road shows, Exhibitions, Agency Presentations, Evening Function = 2 appointments or 3 appointments if Full day event. Take out from sales pro active days: Internal Meetings; Training Days: Holidays *APPOINTMENT LEVEL TEMPLATE; APPOINTMENTS & ACTIVITIES*
2.13	Evidence to show new business club members, verification of BusinessClub bookings or Secretarial/bookers incentive are running activities, offers. Ensure events take place quarterly.	30				Show evidence of new business club sign ups (10 points). Check website for verification of bookings (10 points). Evidence that quarterly events have taken place (10 points). Need to operate a bookers programme with evidence of building booker loyalty.
2.14	The hotel effectively networks accounts with nominated agents	10				Show list of the agents you are responsible for networking and can provide evidence of meetings taking place on a quarterly basis. If sales manager doesn't have agents to network - Put N/a in box and take score out
2.15	Show evidence of 3 accounts that have been penetrated to secure meeting business	15				Provide evidence and results from business secured from effective management in order to achieve meeting business. 5 points per account.
2.16	Show 3 different presentations used to different clients within different market segments. E.G. Corporate, Agent, Conference, Tour & Travel	15				Show evidence of presentations. 5 points awarded per each presentation outlined
2.17	Evidence that data entry on accounts into Sales Systemi is accurate. E.g. Title - Mr, Mrs, Ms Account Name IBM.	20				Pull account production report - indicate errors on data entry input. 10 points if 60% accounts accurate. 20 points if 100% accounts accurate. 0 points if below 60% Review data entry on the above 10 accounts in Delphi is accurate. Not Applicable if hotel not on Delphi or Sales Optimiser or other sales system - Put N/a in box and take score out.
2.18	Where there is more than one sales person in team ensure there is an individual and team target per person which equals overall Room Revenue target (substantial % of total hotel revenue) Excluding Sales Co-ordinators	10				Ensure workbook support document reflects individual and team target both for existing accounts and new business target. *WORKBOOK DOCUMENT/SALES OPTIMISER*

	100%	0.00%	0.00%	0.00%
Score	405	0	0	0
Section Potential	405	405	405	405

Section 3: Revenue Management

No.	Area of Review	Wt	Date	Date	Date	Assessors Comments
3.01	Have there been actions in place over the last 3 months as a consequence of analysis of CRS/GDS/Web production	30	0			Produce evidence to show actions and activities. Revenue Meeting minutes, activities per market segment updated.
3.02	Is the hotel tracking business received from allXYZ Preferred Agents.	5	0			Spot check will be done from tracker sheet - Rooms and Conference
3.03	Are all contracted accounts being tracked via the in-house reservations system	5	0			SM/DOSM to check 5 companies with the reservations manager. SM/DOSM to note which companies which were checked (Produce Tracking Report)
3.04	The DOSM/DDOS/RM/SM attends & participates in the weekly/ monthly Revenue meetings	20	0			Check with GM/Revenue Manager attendance levels. Revenue Minutes. Sales Activities
3.05	The hotel's forecast and Business on the Books by Market Segment current month and next 3 months are discussed at Revenue meetings and appropriate actions are agreed.	20	0			Revenue meeting minutes from last 4 weeks. Look for evidence of agreed sales actions or Sales activities. All actions agreed in Revenue meetings need to be minuted with timelines and outcomes
3.06	Competitor activity is discussed at Revenue meetings, including pricing, promotions, accounts, product development, personnel and performance - data interpreted and relevant action agreed.	20	0			Revenue meeting minutes from last 4 weeks.
3.07	Current promotions are discussed at Revenue meetings, including revenue generated and action needed/achieved.	10	0			Revenue meeting minutes from last 4 weeks.
3.08	There is a system in place for advising the DOSM/DDOS/SM of all conference enquiries received (confirmed, denied, cancelled and lost) and the DOSM/DDOS utilises and actions the information.	20	0			Produce a print out of all the leads generated from conference office over the last four weeks. Forecast, denial sheets produced. Function sheets research and suspect calls and follow up calls taken place. Protelusers able to pull of lost business report - review monthly
3.09	DOSM/DDOS/Sales Manager has a clear understanding of where their hotel sits within Deloitte & Touche Competitor Report (RGI template)	20	0			Spot check by Assessor. Sales team knowledge of RGI target, year to date results. RGI, MPI; ARI results.
3.1	The hotels details are up to date on all Internet sites and accurately reflect the hotels services, facilities and USP's	15	0			Print off top five web sites. Check accurancy of hotel information. Able to comment on activity and room night production. E.g. www.lastminute.com
3.11	DOSM/DDOS/SM has a good understanding of the rate loading process and how to obtain a corporate ID number	20	0			Produce the emails and evidence of the rate loading process, rate disassociation report Show forms completed to apply for Rate Access Codes and Corporate IDs for Specific Accounts,
3.12	The reservation and conference department have an up to date copy of the XYZ Global Sales Account List	5	0			Access to intranet to obtain information. Hard or Electronic copy

	100%			
Score	190	0	0	0
Section Potential	190	190	190	190

No.	Area of Review	Wt	Date	Date	Date	Assessors Comments
Section 4: Current Business Plan/IBP						
4.01	The DOSM/DDOS to show the price analysis grid per market sector for own property and each of your true competitor set. The Competitor Quality Analysis section has been completed	**20**	**0**			Rack, Corporate Rate, FIT, Group, Leisure, Conference rates, Leisure, Airline. Highest & Lowest LCR's. Collate rates on key market segments.
4.02	To provide evidence that action plans are reviewed on a monthly basis with outputs recorded and future activities planned. Taken from Month End, Protel or individual Account Plans	**50**	**0**			Show Action Plans for 3 Market Segments from past 3 months Business Plan updates to ensure strategies are correct and updated. All Action Plans for Market segments to be updated to score 50 points, keep copies of previously updated Action Plans to highlight changes
4.03	The DOSM /DDOS/ Sales Manager has a clear understanding of the hotels budget	**20**	**0**			Team understanding of the hotel annual budget. Check understanding of Room, Other revenues, revpar, occupancy levels, adr
4.04	To understand the top sheet of the P&L and the market segmentation mix	**20**	**0**			Show monthly sales report. Total Revenue, Occupancy, ADR, Revpar, monthly totals. Show variances to budget. Ask DOSM/DDOS to talk through the top 4 market segments for their specific hotel.
4.05	SWOT analysis for Competitor Set	**20**	**0**			Produced for true competitor set. One per competitor to cover all segments. Will be checked Monthly by Direct Report
		100%	**0.00%**			
	Score	130	**0**	**0**	**0**	
		130	130	130	130	

No.	Area of Review	Wt	Date	Date	Date	Assessors Comments
Section 5: TRAINING AND DEVELOPMENT						
5.01	There is a Training Plan/PDP in place for every sales team member	10	0			Show Training Plan/PDP for each member of the sales team. *TRAINING PLAN TEMPLATE. PDP TEMPLATE FROM PERFORMANCE REVIEW DOCUMENT.*
5.02	Entire Sales Team have attended SS1 - Where Appropriate	5	0			Show Action Plans/Certificate for SS1 *SS I ACTION PLAN TEMPLATE*
5.03	Have action plans following training been completed or in progress within timescales and signed off by DOSM/Direct Report?	10	0			Show Action Plans and sign off from Direct Report/DOS/SM. *TRAINING COURSE ACTION PLAN TEMPLATE*
5.04	Updated Job Descriptions are in place for all Sales Personnel	5	0			Hold copy for all team members in HR file. *JOB DESCRIPTION TEMPLATES*
5.05	Hotel Sales to have completed Hotel & Sales Induction programme	5	0			Show dates of hotel and sales inductions for team members
5.06	KPO's to be in place for the entire team and evidence of working towards them	5	0			Show KPO's and evidence of activity *KPO TEMPLATE*
5.07	Regular Performance Reviews undertaken	5	0			Show performance reviews have been undertaken every 6 months. Show now employees evidence of 6 weeks & 3 month reviews. *PERFORMANCE REVIEW TEMPLATE*
5.08	Complete Sales Business Review with direct report	30	0			Complete face to face once every 6 weeks. Evidence of action completed. *SALES BUSINESS REVIEW*
5.09	Field Accompaniment carried out on a Quarterly basis for entire sales team, e.g. Account team members	10	0			Show Field accompaniment document completed for last quarter. Each team member to have 1 field accompaniment for that quarter with direct report; hotel management team; global sales *FIELD ACCOMPANIMENT CHECKSHEET*
5.10	Product Knowledge training to relevant hotel personnel	10	0			Show that sales product, coach, training in house is carried out at least twice per year. E.g. showround training, marketing programmes, system training, new procedures/standards.*SALES INDUCTION PPT & SALES PROCEDURES/STANDARDS*
		100%				
	Score	95	0	0	0	
		95	95	95	95	

	Section 6: FIELD ACCOMPANIMENT					Assessor to check that each team member has had a Field accompaniment with DOSM/DIRECT REPORT, 1 per quarter. Mean score then to be used for each question for the entire team.
No.	**Area of Review**	**Wt**	**Date**	**Date**	**Date**	**Assessors Comments**
6.01	Average Appointment Score.	**100**	0	0	0	
		100%	**0%**	**0%**	**0%**	
	Score	100	**0**	**0**	**0**	
	Section Potential	100	100	100	100	

Section 10: RECOMMENDATIONS/ACTION PLAN

	AREA	ACTIVITY	TIMELINE AGREED	OWNER
KEY ACTIONS IDENTIFIED				
FUNCTIONAL SUPPORT REQUIRED				