

Sales Training & Consulting Partner Vetting Checklist

Use this fillable checklist during your calls or meetings with potential sales training partners. The first section helps you evaluate your impressions after the conversation. The second section gives you direct questions to ask the consultant. Fill it out live so you can compare and make the most informed decision.

Questions to Ask Yourself

Question	Notes / Impressions	Rating (1-5)
How much do they know about your problems before they send a proposal?		
How does their selling process feel?		
Have they asked where sales training fits among your other priorities?		
Through their curiosity, did you learn something you didn't know you didn't know?		
Do they think they must be an expert in your industry to help you?		
Do they apply pressure to get a yes?		
Do they have a track record of success?		
Will you get personalized coaching or be just another client?		
Do they leave you with a better understanding of your problem?		

Questions to Ask a Sales Consultant

Question	Consultant's Answer	Notes / Follow-up
Who is an ideal client for you?		
What recommendations do you have for us to maximize the effectiveness of sales training?		
What is your belief system about sales?		
What types of sales training and coaching do you offer?		
What is your training model, and why do you deliver it that way?		
How do you help companies reach their full potential?		
What does ongoing support and advice look like as our business grows?		
How do you assess the strengths and weaknesses of a sales team and build a plan?		
How do you measure the effectiveness of your training? How do you track progress?		
How do you plan to communicate and collaborate with our sales managers and stakeholders?		
How will you support our team's ongoing development and growth?		
Can you walk me through a typical coaching session and your feedback process?		
How do you follow up with the sales team after the coaching engagement?		



Pro Tip

After each meeting, compare your completed checklists side-by-side to make a confident, informed decision.