

WHAT'S IN YOUR TOOLBOX? – WORKSHEET

Audit and Optimize Your Sales Resources

Use this worksheet as a quick way to evaluate the effectiveness and availability of the tools necessary to succeed. Keep in mind, they may be digital, hard copy, mental, verbal, or even other resourceful people!

Step 1 – Sales Stage Tool Audit

List the tools you currently use at each stage of the sales process. These can be physical, digital, or communication tools.

Sales Stage	Tools I Currently Use	Notes (Effective? / Gaps?)
Prospecting		
Qualifying		
Objection Handling		
Closing		
Retention & Follow-Up		

Step 2 – Tool Health Check

Circle the answer that best describes your current toolkit for each stage.

Sales Stage	Well-Stocked 👍	Needs Upgrade ⚠️	Missing Entirely ✖️
Prospecting			
Qualifying			
Objection Handling			
Closing			
Follow Through			
Other? Your Choice			

Step 3 – Gaps & Opportunities

Which tools are missing, outdated, or underused?

-
-
-
-

Step 4 – Toolkit Tiers

Essential Tools (used weekly):

-
-
-

High-Leverage Tools (deal savers):

-
-
-

Personal Assets (self-created):

-
-
-

Step 5 – Your Starter Toolbox Plan

From your audit, list 5 tools you will organize, create, or upgrade before the next session.

- 1.
- 2.
- 3.
- 4.
- 5.