

# Sales Team Coordination Survey Template

All questions are optional. Follow each question's directions.  
Write your answers to the open questions in the space provided.

Think about shared-account work with this sales team during the named month. Every question is optional. Do not include customer names, deal values, prospect details or information identifying a colleague. Focus on the coordination process.

## 1. How often did your work on an account depend on another team member during the month?

- ☐ Never
- ☐ Rarely
- ☐ Sometimes
- ☐ Often
- ☐ Very often
- ☐ Not applicable

## 2. How clear was it who owned the next action on shared accounts?

- ☐ Very clear
- ☐ Somewhat clear
- ☐ Neither clear nor unclear
- ☐ Somewhat unclear
- ☐ Very unclear
- ☐ Not applicable

## 3. How easy was it to find the latest agreed customer requirements?

- ☐ Very easy
- ☐ Somewhat easy
- ☐ Neither easy nor difficult
- ☐ Somewhat difficult
- ☐ Very difficult
- ☐ Not applicable

# Sales Team Coordination Survey Template

All questions are optional. Follow each question's directions.  
Write your answers to the open questions in the space provided.

## 4. How often did account handoffs include enough context for you to continue the work?

- ☐ Never
- ☐ Rarely
- ☐ Sometimes
- ☐ Often
- ☐ Always
- ☐ I did not receive a handoff
- ☐ Not sure

## 5. How quickly did you learn about changes to commitments relevant to your work?

- ☐ Before I needed to act
- ☐ In time to adjust
- ☐ After I had already acted
- ☐ I did not learn about some changes
- ☐ No relevant changes occurred
- ☐ Not sure

## 6. Where did coordination most often slow down?

- ☐ Assigning the next owner
- ☐ Finding current information
- ☐ Transferring context
- ☐ Confirming a changed commitment
- ☐ Resolving conflicting priorities
- ☐ Another point
- ☐ No slowdown
- ☐ Not sure

# Sales Team Coordination Survey Template

All questions are optional. Follow each question's directions.  
Write your answers to the open questions in the space provided.

**7. What one change would make shared-account work easier next month?**

---

---

---

---