What Winning FECs Have in Common

A Sales, Service & Leadership Checklist for Growing Teams

A practical checklist to help your team spot gaps, start better conversations, and choose where to focus next.

How to use it

1. Have each leader answer the checklist individually first.
2. Bring the team together and compare answers.
3. Circle the areas where answers are mixed or unclear.
4. Choose your top 3 growth opportunities.
5. Schedule a free 30-minute Growth Check-In Call if you want help walking through the results.

Rating Guide

Yes	Somewhat	Not Yet
This is clear and consistent.	This happens, but not every time.	This needs attention or structure.

Use the checkboxes in each section to mark Yes, Somewhat, or Not Yet. The goal is not to grade the team. The goal is to find the next right conversation.

SALES STRUCTURE

Sales Structure

Use this section to talk about whether your sales process is clear, consistent, and easy for the team to follow.

Question	Yes	Somewhat	Not Yet
Do we have a clear sales process that everyone follows?	[ ]	[ ]	[ ]
Are leads followed up on quickly and consistently?	[ ]	[ ]	[ ]
Do we know how many inquiries turn into booked events?	[ ]	[ ]	[ ]
Do we know why people do not book?	[ ]	[ ]	[ ]
Does the team know how to respond when a guest says, "I need to think about it"?	[ ]	[ ]	[ ]
Are we actively selling, or mostly waiting for people to call us?	[ ]	[ ]	[ ]

TEAM NOTES

TEAM ACCOUNTABILITY

Team Accountability

Use this section to look at expectations, coaching, ownership, and follow-through.

Question	Yes	Somewhat	Not Yet
Does every team member know what success looks like in their role?	[ ]	[ ]	[ ]
Are expectations written down and reinforced regularly?	[ ]	[ ]	[ ]
Do managers follow up on goals, tasks, and commitments?	[ ]	[ ]	[ ]
Are team members coached when performance slips?	[ ]	[ ]	[ ]
Do we celebrate wins and recognize progress?	[ ]	[ ]	[ ]
Does the team understand how their role impacts revenue and guest experience?	[ ]	[ ]	[ ]

TEAM NOTES

GUEST EXPERIENCE

Guest Experience

Use this section to review what guests see, hear, feel, and remember.

Question	Yes	Somewhat	Not Yet
Are we delivering consistent guest experience from first contact to follow-up?	[ ]	[ ]	[ ]
Do guests receive clear communication before their visit or event?	[ ]	[ ]	[ ]
Are parties, groups, and events hosted with intention?	[ ]	[ ]	[ ]
Do we know what guests compliment most often?	[ ]	[ ]	[ ]
Do we know what guests complain about most often?	[ ]	[ ]	[ ]
Are we using guest feedback to coach the team?	[ ]	[ ]	[ ]

TEAM NOTES

LEADERSHIP ALIGNMENT

Leadership Alignment

Use this section to talk about whether leaders are focused on the same priorities.

Question	Yes	Somewhat	Not Yet
Is our leadership team focused on the same top priorities?	[ ]	[ ]	[ ]
Do we agree on what needs to improve first?	[ ]	[ ]	[ ]
Are we spending too much time reacting to daily issues?	[ ]	[ ]	[ ]
Do we have regular leadership meetings with clear action steps?	[ ]	[ ]	[ ]
Are decisions based on data, habits, or assumptions?	[ ]	[ ]	[ ]
Are we building toward the next 1, 3, and 5 years?	[ ]	[ ]	[ ]

TEAM NOTES

MARKETING AND PROMOTIONS

Marketing and Promotions

Use this section to see whether marketing is connected to revenue and sales activity.

Question	Yes	Somewhat	Not Yet
Are our promotions tied to clear goals?	[ ]	[ ]	[ ]
Do we know which promotions actually drive revenue?	[ ]	[ ]	[ ]
Are we marketing consistently, not only when business feels slow?	[ ]	[ ]	[ ]
Are we giving guests a clear reason to book now?	[ ]	[ ]	[ ]
Are sales and marketing working together?	[ ]	[ ]	[ ]
Do our website, emails, and social posts make the next step clear?	[ ]	[ ]	[ ]

TEAM NOTES

FOLLOW-UP AND RETENTION

Follow-Up and Retention

Use this section to find repeat revenue that may be getting missed.

Question	Yes	Somewhat	Not Yet
Do we follow up after birthday parties, group events, and corporate outings?	[ ]	[ ]	[ ]
Are past guests invited back with a clear reason to return?	[ ]	[ ]	[ ]
Do we have a plan to stay in touch with our best customers?	[ ]	[ ]	[ ]
Are we asking happy guests for referrals, reviews, or repeat bookings?	[ ]	[ ]	[ ]
Do we know which guests or groups are most valuable to our business?	[ ]	[ ]	[ ]
Is follow-up part of our process, or does it depend on who remembers?	[ ]	[ ]	[ ]

TEAM NOTES

FINAL CONVERSATION

Choose Where to Focus First

After your team answers the checklist, use this page to turn the conversation into a simple action plan.

What is working well right now?

_____
_____
_____

What feels harder than it should?

_____
_____
_____

Where are we losing the most time?

_____
_____
_____

Where are we likely losing the most revenue?

_____
_____
_____

What does the team need more training or support on?

_____
_____
_____

Top 3 Growth Opportunities

Opportunity	Why it matters	First next step

Schedule Your Free Growth Check-In Call

Want help walking through your answers?

Schedule a free 30-minute Growth Check-In Call with TrainerTainment, a division of The GrowthPro Group. We will help you spot patterns, identify your top opportunities, and send you a simple Growth Snapshot with suggested next steps.

Schedule your free 30-minute call: https://growthcall.trainertainment.net/#/schedule