Klarstig

Sales Technology Readiness Assessment

Assess the current situation, identify gaps and prioritize practical actions. Support ratings with observations rather than assumptions.

Contact and reference

Organization using this document

Your name or contact reference *

Email for a reply if needed

Information for this document

Area or process being assessed *

Current situation and evidence *

Desired outcome or standard *

Most important gap or concern *

Likelihood of the concern occurring *

- ☐ Low
- ☐ Medium
- ☐ High
- ☐ Unknown

Potential impact *

- ☐ Limited
- ☐ Moderate
- ☐ Significant
- ☐ Unknown

Recommended action and owner *

Next review date

Specific details

Launch activity or change being assessed

Complete when relevant to this request.

People process equipment and evidence needed before starting

Operating context

Product system or environment reference

Complete when relevant to this request.

Version dependencies access limits and test or service window

Team specific details

Account opportunity or sales owner

Complete when relevant to this request.

Customer needs buying stage commitments and next agreed contact

Limitations and what needs setup

- Submitting the form records the answers in your workspace. It does not approve, schedule, charge or reply on its own unless you add that step to the workflow.
- Email notifications, approval routing, document generation and connections to other systems are available but not switched on until you configure them.

Want help tailoring this form? Free, Starter and Pro include five personal setup sessions, up to 30 minutes each, per new organization.

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