



Objective
Management
Group®

SALES CANDIDATE ASSESSMENT.

Name Removed

JANUARY 20, 2023

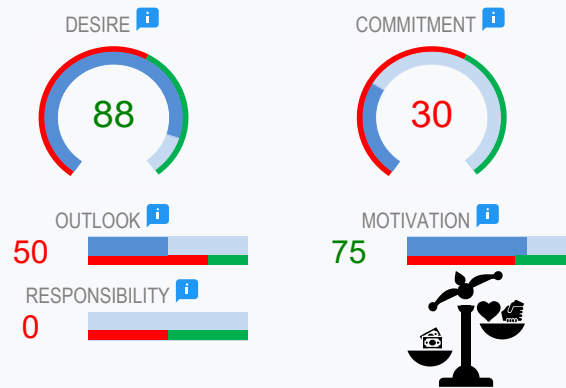
COMPANY NAME

ACCOUNT EXECUTIVE

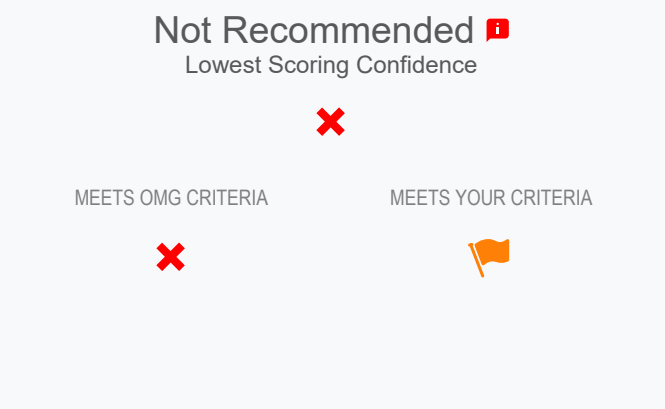
NOT RECOMMENDED

LOWEST SCORING CONFIDENCE

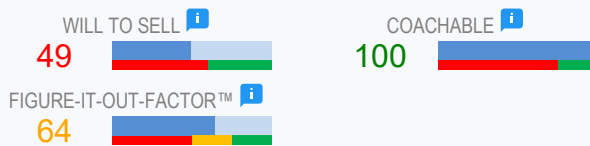
The Will to Sell Competencies



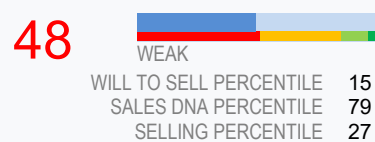
Recommendation for an Interview



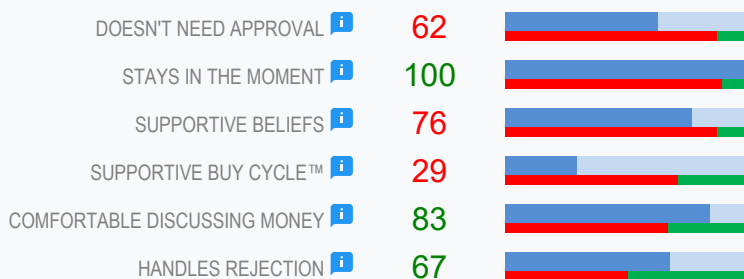
Development



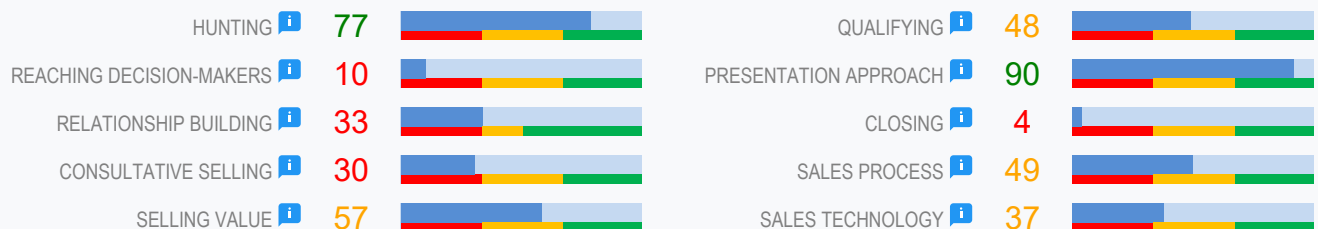
Sales Percentile™



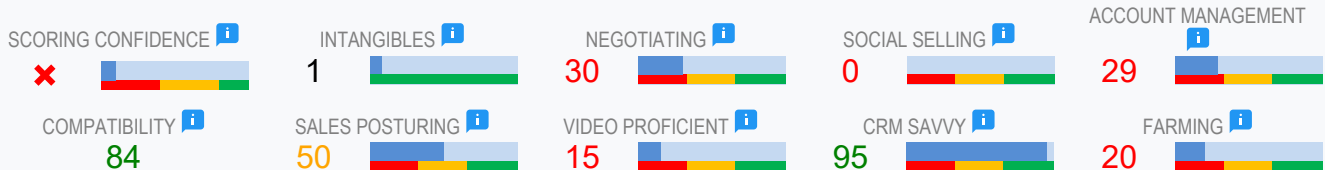
Sales DNA Competencies



Selling Competencies



Other Scores



This assessment focuses on the likelihood of Teresa's sales success in this particular selling role at your company. We also suggest whether Name has strong Will to Sell and is coachable, and provide guidance as to the areas in which Name may require help during the onboarding process. While this is an important component of the selection process, it is only one component. This assessment does not measure intelligence, technical knowledge, self-presentation, or appearance. This is not a personality test or a behavioral styles assessment. While assessments of that nature are perfectly well designed for general employment purposes, they are not predictive of sales success and we do not recommend their use in the sales selection process. Our assessment will uncover sales issues that were likely hidden from view, even in a fairly comprehensive series of interviews. Therefore, our recommendations should be considered accordingly. Explanations for most of our findings can be found by clicking on the camera icons on the previous page.

DO WE RECOMMEND YOU INTERVIEW Name

is not recommended for an interview because Teresa's Scoring Confidence is at its lowest possible value. Multiple issues contributed to this low score, and are detailed in the next section of this document.

Because Name doesn't possess strong Will to Sell, it is not realistic for you to expect significant sales growth from participating in a sales training program.

Recommendation for an Interview ❌

- ❌ Scoring Confidence must be above lowest level
- ❌ Meets OMG Criteria
 - ❌ Will to Sell
 - ✅ Meets minimum Sales DNA of 60 for difficulty level
- 🚩 Meets Your Criteria
 - ✅ Competition resistant
 - ✅ Value seller
 - ❌ Able to work independently in a remote location
 - ✅ Will hunt for new business
 - ✅ Entrepreneurial seller

We were able to identify the existence of one intangible.

Intangibles	1
– Winning Personality	
– Industry Expert	
– Provides Award-Level Service	
– Extremely Well-Liked / Loved	
– Extremely Well-Known	
– Been in the Industry for Decades	
– Huge Book of Renewal Business	
– Lives Off of an Endless Number of Quality Referrals	
✅ Recipient of the Most Company Leads	
– Has the Best Territory	
– Has the Biggest Customers or Clients	
– Has the Best Customers or Clients	

HOW CONFIDENT ARE WE IN OUR RECOMMENDATION?

One of the questions that clients sometimes ask is, "Can I trust that Name didn't 'fool the test'?" Despite a predictive validity in the 95 percent range, clients often wonder if their candidate falls into that scary 5% range. Our Scoring Confidence should help you determine whether or not you can trust the honesty and consistency of Teresa's answers. Each candidate is assigned a confidence rating of High Confidence, Moderate Confidence, Low Confidence, or No Confidence, based on how he or she answered the questions in the assessment.

We compiled scores in several separate categories, including Congruency (candidate's consistency in answering carefully selected sets of questions), time spent completing the questionnaire, the number of breaks taken while answering the questionnaire, whether the individual's experience is appropriate for his or her tenure in sales, and whether the individual has taken a free trial or requested samples from us.

No Confidence



A low Confidence Score indicates that we are not confident that Teresa's answers represent what he or she does when selling versus what he or she thinks are the correct answers. You should use extreme caution.

Among the assessment questions, we have identified 3 sets of inconsistent answers. We have included questions related to this in the interviewing tips section of this assessment.

Name paused and resumed the questionnaire 5 times, which makes us concerned about the accuracy and consistency of Teresa's answers.

When asked if there was any reason why the answers may not be accurate Name responded, "I was distracted."

WHAT SHOULD YOU ASK Name DURING THE INTERVIEW?

We don't advocate interviewing candidates who are not recommended although some managers do this anyway. If you are interviewing such a candidate, use the following interviewing tips to validate Teresa's weaknesses. In time, you'll learn to accept the findings at face value without taking the time to conduct an unnecessary interview.

Ask what would happen if Name was in a selling situation that caused discomfort or fear, or it seemed quite challenging, or if Name disagreed with what you wanted done. Anything other than I'd do it anyway shows the finding of "lacks commitment."

Ask if Name felt discouraged or frustrated, experienced any personal problems, personality clashes, resentment or anger toward anyone at a prior job or more recently than that. This should demonstrate an outlook problem.

Ask why Name is leaving or left a recent job. Listen for excuses. This demonstrates excuse making.

If Name thinks things over before buying (vulnerable to "think it over" from the weaknesses section) ask why Name lets prospects think it over. An understanding of the prospect's need to think it over demonstrates non-supportive Buy Cycle™.

Look at the self-limiting beliefs highlighted throughout this document. Read one of Teresa's more alarming beliefs aloud and ask what happens as a result of that self-limiting belief. Ask if that's a good thing or not.

Ask if Name likes people. From a sales perspective, ask which is more important, making someone happy or getting the business. You'll probably hear either "both" or "making someone happy." This demonstrates need for approval.

Ask "What's the best example you can give me about overcoming adversity?" (Lack of Desire or Commitment)

Ask "Why do customers like you?" (Need for Approval)

Ask "Why do customers trust you?" (Need for Approval)

Ask "What could you do to have customers like and trust you more?" (Need for Approval)

Ask why Name says that most of the selling time is spent asking questions when Teresa's answers suggest that Name presents the reasons why the prospect should buy instead of allowing the prospect to share those reasons with Name.

Ask how Name is able to get appointments given the inability to get past gatekeepers.

Ask why prospects are often saying they like Name even though making friends is not Teresa's greatest strength.

HOW COMFORTABLE IS Name WITH YOUR SALES ENVIRONMENT?

The Compatibility score reflects the alignment between the requirements of your selling role and those with which Name indicated having the most experience and past success. This is different from our Client Criteria, which check for the existence of specific skills and

	Compatibility	84
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- ✓ The candidate has the experience required in your role specification.
- ✗ The candidate does not have the experience required in your role specification.
- The candidate has experience that was not required in your role specification.

Primary Market

- ✓ Corporate/Industrial
- Residential
- ✓ Small business/professional
- ✗ Institutional

Prospects by Title

- Ownership or C Level
- Management Level
- Business Users
- Consumers

Resistance

- No resistance
- Very little resistance
- Moderate resistance
- Lots of resistance

Competition

- Tremendous Competition
- Regular competition
- Occasional competition
- We are the only game in town

Pricing

- We are usually higher
- We are usually competitive
- We are usually lower

Average Order

- Under \$US1,000
- \$US1,000 - \$US25,000
- \$US25,000 - \$US250,000
- Over \$US250,000

Product Sold

- Custom engineered solutions
- Conceptual services
- Products we can demonstrate
- Commodities

Sales Cycle

- A one call close
- Two to three calls
- 3-6 months
- More than 6 months

Customer Development

- Sell them and move on
- Sell them on a regular basis
- Sell them and renew yearly
- Sell them and service them

Priorities

- Hunting required
- Mostly hunting
- Some hunting required
- No hunting

Closing

- Salesperson will do the closing
- Salesperson will plant seeds
- Inside people do the closing
- Someone else does the closing

Presentations

- Once to a single decision maker
- Once to a group
- Multiple times to individuals
- Multiple times to a group

Product Quality

- Top of the line
- Middle of the pack
- A little behind
- Different

Pressure

- High
- Medium
- Low
- None

Supervision

- Micro managed
- Closely managed
- Seldom managed
- Not managed

Company

- Small professional firm
- Small to medium sized business
- Large business
- Major corporation

Compensation

- All salary
- Straight commission
- Mostly salary with some commission
- Mostly commission with some salary

Selling Environment

- Turbulent and ever changing
- Downsizing and turnover
- Rapid growth and expansion
- Very calm and stable

Location

- Out of my office or one staffed by a sales manager
- Out of a branch office without a sales manager
- Out of a remote or home office without staff

Entrepreneurial

- Have an Entrepreneurial Mindset
- Not Have an Entrepreneurial Mindset
- It does not matter

Selling Methods

- On the phone
- Face to Face
- At trade shows

Channel

- Directly to the Customer / Client
- Through someone who sells to our Customer / Client

Decision Factor

- are buying what we sell but must choose from whom to buy (Why me?)
- haven't planned to buy what we sell (Why?)

Networking

- Social Selling
- Traditional Networking
- ✓ Either of the above
- Social Selling AND Traditional Networking
- These skill sets are not required

Leads

- We provide all they need
- ✓ We provide some - they need to supplement
- We don't provide any - they need to prospect
- This is an account management position

Selling Value - Name has some of the attributes required for selling value. Use this assessment to identify the gaps in the Selling Value competency.

Qualifying - Name has some of the attributes for effective qualifying. Use this assessment to identify the gaps in the Qualifying competency.

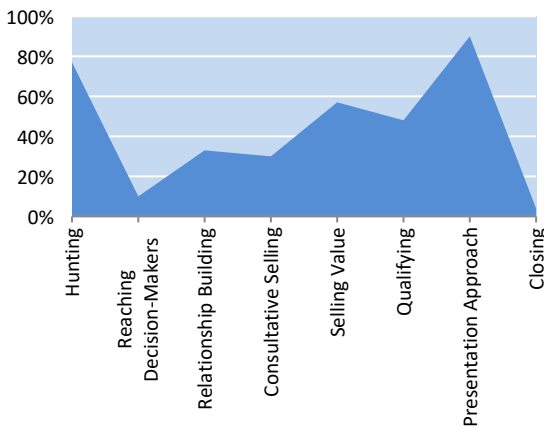
Presentation Approach - Name has a strong approach to presentations, and generally presents the right information, at the right time, and to the right people.

Closing - Name has very few of the attributes required for consistent, effective closing. Use this assessment to develop a better understanding of the attribute.

WHAT ARE TERESA'S CURRENT SALES CAPABILITIES?

Selling Competencies

Teresa's current sales capabilities can be best illustrated by reviewing the graph below.



The graph tells a story that suggests the following capabilities:

Hunting - Name has the attributes necessary for consistent, effective hunting.

Reaching Decision-Makers - Name has very few of the attributes required to get decision makers engaged.

Relationship Building - Name has some of the attributes required to develop strong relationships with customers and prospects.

Consultative Selling - Name has very few of the attributes required for selling consultatively. Use this assessment to identify the gaps in the Consultative Selling competency.

The details of those Competencies are found in other sections of this document where they were used to support our answers and findings. The explanations appear prior to each detailed Competency and provide you with a greater understanding of their meaning.

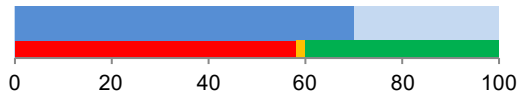
As we present our data-supported findings and continue answering these important questions, the Competencies will be a consistent part of those answers. While there is much more to sales and selling than skills - strategies and tactics - they do represent 50% of the equation. The other 50% is represented by Sales DNA that must support the use of those skills.

It is very important to understand that **salespeople with the right Sales DNA but few skills will always outperform salespeople with good skills but less than desirable Sales DNA.**

Sales DNA

As we mentioned earlier, sales skills are not the only factors that determine sales capabilities. The overall level of Sales DNA is even more important. When strong, Sales DNA supports a salesperson's ability to execute. Less than desirable Sales DNA hinders the ability to execute skills and process. Sales DNA includes all of Teresa's selling-related strengths. Teresa's Sales DNA Score, shown below, is comprised of six major strengths that have the greatest impact on sales call performance. Lower numbers represent Sales DNA that will impede a salesperson's performance.

70



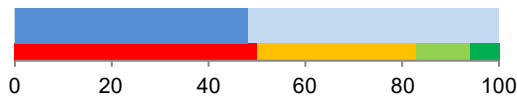
This score suggests that the Sales DNA will sometimes interfere with sales effectiveness.

Sales Percentile™

Think of Sales Percentile™ as the overall score on this assessment. It represents a weighted combination of our Sales Core Competencies, expressed relative to the other salespeople we have assessed. A Sales Percentile™ of 90% means that 90% of salespeople we have assessed are weaker, and 10% are stronger.

Only 6% of all salespeople land in the top category – Elite. Another 11% appear in the next category – Strong. 33% of salespeople fall into the Serviceable category. The bottom 50% of salespeople are generally Weak.

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HOW MOTIVATED IS Name AND HOW CAN Name BE MOTIVATED?

Motivation is as important as ever but today's salesperson is not necessarily motivated by money. Motivation can appear as Intrinsic, Extrinsic, and/or Altruistic.

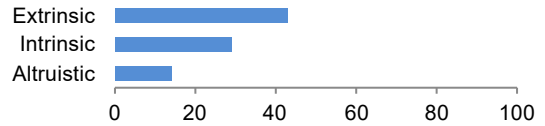
Intrinsics tend to be motivated by recognition, fulfillment, satisfaction, enjoyment, love of selling, mastery, or even when they have something to prove to others. They are often more consistent in a longer and more complex sales cycle.

Extrinsics tend to be motivated by money, rewards, toys, vacations, and material things. They are more effective in a shorter and/or more heavily commissioned sales cycle.

Altruistic salespeople are motivated to serve others at a cost to themselves. These salespeople put the customer ahead of their company's needs and requirements.

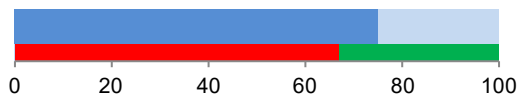
Teresa's motivation style is:

Extrinsic



Teresa's overall level of motivation is:

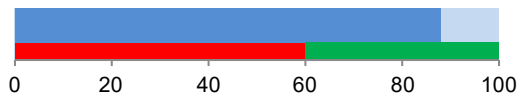
75



Name really likes the rewards that can be earned from selling. Whether it is cash, vacations, homes, cars, boats, college tuition, or toys.

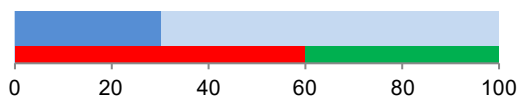
Name has strong Desire for greater sales success:

88



Name lacks strong Commitment towards greater sales success:

30



Everyone responds differently to motivation so we thought you might find it useful to learn what Name will respond to.

Motivational Tendencies

Name prefers

- Loving to win **more than** hating to lose
- Self-rewarding performance **instead of** spending money first to create pressure to perform
- Self-pressure **instead of** being pressured
- Being closely managed **instead of** self-management
- Self-competition **over** competing against others
- Recognition **over** satisfaction

There are several additional important factors that impact overall motivation. While these factors do not influence our recommendation, they are important enough for you to make them conditions that must be met if you choose to offer Name a position.

Other Factors

2

- ✓ Enjoyment of Selling
- ✗ Personal Goals
- ✓ Meaningful Goals
- ✗ Plan for Reaching Personal Goals
- ✗ System to Track Progress



Name believes that
Money isn't that important to me

WILL Name GENERATE NEW BUSINESS?

The Hunting Competency contains the attributes required for successful development of new business. While the overall percentage in this Competency is meaningful, it is less important than certain individual attributes.

Specifically, it is important for salespeople to possess these attributes:

- Prospects Consistently
- Will Prospect
- Has No Need for Approval
- Recovers from Rejection
- Maintains a Full Pipeline

Not a Perfectionist - This may seem like a negative but in the case of hunting, some perfectionists seriously delay making calls until they believe the calls can be perfect.



The Hunting Competency

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- ✓ Will Prospect
- ✓ Prospects Consistently
- ✓ Prospects via Phone and / or Walk-ins
- ✗ Has No Need for Approval
- ✓ Schedules Meetings
- ✓ Recovers from Rejection
- ✗ Maintains Full Pipeline
- ✓ Not a Perfectionist or it Does Not Prevent Prospecting
- ✓ Likable
- ✗ Reaches Target Prospect
- ✗ Gets Referrals from Customers / Network
- ✗ Uses Social Selling Tools
- ✓ Attends Networking Events

This is one of the few sales candidates who are both willing to prospect for new business and doing it consistently.



Name believes that
I have to provide information to gatekeepers before they will connect me with the decision maker

WILL Name REACH DECISION MAKERS?

We looked at a number of factors to determine whether Name is meeting with decision makers and what, if anything, could interfere with that.



The Reaching Decision-Makers Competency

10

- ✗ Calling on Actual Decision Maker
- ✗ Believes Speaking with Decision Makers Is Required
- ✗ Reaching Decision Maker Is Milestone in Sales Process
- ✗ Does Not Need to be Liked
- ✓ Comfortable with Targeted Decision Maker
- ✓ Doesn't Begin Sales Process with Buyers
- ✗ Uses Selling Skills to Reach Decision Maker

Name does not yet have the strengths and skills necessary for reaching decision-makers. Over time, and when combined with other incremental improvements, developing the ability to achieve this milestone can shorten sales cycles, eliminate competition, increase win-rates and help identify the compelling reasons to buy. Advanced selling skills around strategy and tactics should help Name reach decision makers.

WILL Name HAVE AN OPTIMIZED SALES CYCLE?

To answer this question we looked at 11 factors that historically support shorter sales cycles. These factors tend to prevent delayed closings and business lost to competitors. We present the 11 factors as they apply to Name in the next table.

- Not Likely to Take "Think it Overs" – Salespeople that make buying decisions without having to think it over have Sales DNA that supports strategies and tactics to help their prospects make decisions.
- Consultative Selling – If salespeople can sell consultatively they can uncover the compelling reason to buy, a motivator that creates urgency and shortens the sales cycle.
- Qualifying – If salespeople qualify thoroughly there will be fewer opportunities for premature demos, quotes, proposals, and presentations that lead to delayed closings and lost business.
- Unlikely to be Derailed by Put-Offs – The ability to ask a question in response to a put-off can lead to closing more business at the first closing opportunity.
- Doesn't Need Approval – A salesperson that doesn't need to be liked accepts fewer put-offs because they aren't concerned about asking another question, pushing back, or challenging the prospect.
- Able to Stay in the Moment – If salespeople do not panic in the heat of battle or become too excited when they hear what they want to hear, they can control the sales process more effectively.
- Will Discuss Finances – When salespeople are able to discuss finances they are more likely to uncover the actual budget and confirm the prospect's ability to spend it. That tends to prevent most of the delays blamed on money.
- Recovers from Rejection – When salespeople are unaffected by rejection they are more likely to ask good, tough, timely questions, even when the answer could result in a "no."

- Healthy Skepticism – When salespeople have a healthy skepticism, they can avoid happy ears, not mistake put-offs for promises, and have much better sense for determining realistic expectations.
- Supportive Beliefs – When salespeople have beliefs that support ideal sales outcomes they are more successful.
- Effective Sales Process – When the sales process lends itself to repeatable and desirable results, sales cycles tend to be much shorter while conversion ratios tend to be much higher.

Factors	3
✗ Not Likely to Take "Think it Overs"	
✗ Consultative Selling	
✗ Qualifying	
✗ Unlikely to be Derailed by Put-Offs	
✗ Doesn't Need Approval	
✓ Able to Stay in the Moment	
✓ Will Discuss Finances	
✓ Recovers from Rejection	
✗ Healthy Skepticism	
✗ Supportive Beliefs	
✗ Effective Sales Process	

At this time Name does not have the factors to support a short sales cycle.



Name believes that
Prospects that think it over will eventually buy from me



Name believes that
I understand when my prospects want to think it over



Name believes that
I understand when my prospects want to comparison shop

CAN Name SELL CONSULTATIVELY?

Selling has changed dramatically since 2019. The biggest changes are that:

- It's more difficult to reach prospects
- Prospects do not have time to meet
- There is much greater resistance
- Salespeople tend to be invited in later in the sales cycle
- There is far more price sensitivity
- Prospects are more cautious and conservative on what they spend their money
- There is greater need to differentiate
- Virtual selling is more prominent

Consultative Selling is an approach that helps salespeople deal with the issues listed above. It is the most misunderstood term in all of sales with most people believing that a salesperson must ask questions, identify an issue and present a solution. This isn't entirely wrong, but it does fall short of the intended meaning, and most salespeople aren't actually selling this way. Instead, they have some prepared questions, ask some of them, and when a question leads to an issue, they begin to talk about a solution.

When Consultative Selling is properly executed it can help a salesperson differentiate, sell value, and sometimes be viewed as a Trusted Advisor. This can only occur after a salesperson has asked enough questions (dozens) to go as wide and deep as possible, leading to a discussion of issues, opportunities, implications, the people they affect, and potential outcomes. As much as consultative selling relies on highly developed questioning skills, equally well-developed listening skills are an even more important component.

The Consultative Selling Competency 30

- ✓ Able to Stay in the Moment
- ✗ Uncovers Reasons to Buy
- ✓ Reasons to Buy Are Compelling
- ✗ Able to Listen/Ask with Ease
- ✗ Asks Enough Questions
- ✗ Asks Great Questions
- ✗ Gets Prospects Past "Nice to Have"
- ✗ Will Build Trust *
- ✗ Able to Ask Tough Questions
- ✗ Takes Nothing for Granted
- ✗ Appropriate Amount of Patience
- ✓ Understands How Prospects Will Buy
- ✗ Develops Strong Relationships **
- ✓ Presenting at Appropriate Times
- ✗ Healthy Skepticism

* The following table provides additional detail regarding how well Name builds trust.

The Building Trust Competency 26

- ✗ Gains Trust Early
- ✗ High Integrity Seller
- ✗ Customers Share Information Early
- ✗ Gets First Call from Customers
- ✓ Quickly Develops Rapport
- ✓ Likable

** The following table provides additional detail regarding how quickly Name develops relationships.

The Relationship Building Competency 33

- ✓ Quickly Develops Rapport
- ✗ Relationship Is Key Factor in Winning Business
- ✗ Relationships Generate New Business
- ✓ Develops Strong Relationships over Time
- ✗ Customers Follow to New Companies
- ✗ Believes That Making Friends Is Single Greatest Asset
- ✗ Extroversion Supports Relationship Building

Name lacks the strengths and skills necessary for selling in a more consultative way.



Name believes that
I tell my prospects why they should buy from me

WILL Name SELL VALUE?

When salespeople feel that they need a more competitive price or the lowest price in order to win the business, the chances are quite good that they aren't effectively selling the value. In order to determine whether this candidate can more effectively sell value, we looked at a number of factors, including:

- **Learns Why Prospects Will Buy** – A salesperson's ability to uncover a prospect's reasons to buy helps the salesperson discover the true value in the opportunity.
- **Focused on Value over Price** – When salespeople buy value rather than seek out the lowest price they are more likely to be effective at selling value. Salespeople who are price shoppers have the most difficulty upholding margins, creating and selling value, and competing against lower priced competitors.
- **Will Discuss Finances** – When a salesperson is uncomfortable having a financial discussion, it may have a significant, negative impact on any opportunity when the prospect lacks the funding or doesn't see the value in the offering.
- **High Threshold for Money** – A salesperson with a High Money Threshold should be able to ask for a lot of money (not to be confused with Able to Discuss Money) without concern for the amount being "a lot" to them personally.



The Selling Value Competency

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- ✓ Focused on Value over Price
- ✓ Will Discuss Finances
- ✗ High Threshold for Money
- ✓ Attempts to Sell Value
- ✓ Sales Process Supports Selling Value
- ✗ Learns Why Prospects Will Buy
- ✗ Doesn't Need Approval
- ✗ Asks Great Questions
- ✗ Asks Enough Questions
- ✗ Avoids Making Assumptions
- ✓ Quickly Develops Rapport
- ✗ Not Compelled to Quote

Name is not a value seller today, but can become a value seller in the near future. The most important element to selling value – the way Name buys value – is already in place.



Name believes that
A thousand dollars is a lot of money

WILL Name CLOSE EFFECTIVELY?

The Closing Competency helps us to understand whether or not Name has the attributes that will help to convert qualified opportunities at the time they become closable. Some opportunities close later than expected because they were not closed at the first closing opportunity.

While the Closing Competency explains what Name is capable of accomplishing at closing time, closing has much more to do with factors that precede the closing step of the sales process, most of which we have already discussed:

- Consultative selling skills
- Qualifying Skills
- Sales process (later in the document)
- Sales Posturing Skills (See the next table for the details)



The Closing Competency


4

- ✗ Gets Prospect to Agree to Make a Decision
- ✗ Will Meet with the Decision Maker
- ✗ Will Find a Way to Close
- ✗ Not Likely to Take "Think it Overs"
- ✗ Unlikely to be Derailed by Put-Offs
- ✗ Appropriate Amount of Patience
- ✗ Closing Urgency
- ✗ Isn't Hoping to be Liked
- ✓ Will Stay in the Moment at Closing Time
- ✗ Won't Make Inappropriate Quotes


Although sales effectiveness is typically measured by revenue, there is more to selling than the end result. All too frequently the end result is simply a sum of its parts, a by-product of a salesperson's motivation, determination, strengths, skills, competencies, strategies, tactics and posturing.

The next table shows the qualities that support effective posturing and whether Name is able to effectively position your products, services, and company and make a memorable first impression.

A yellow flag indicates that Name is neither strong nor weak in that particular quality.

 The Sales Posturing Competency 50	
✓	Good Self-Image
✓	Quickly Develops Rapport
✓	Sales Optimism
✓	Sales Assertiveness (Consistently Assertive)
✗	Sales Empathy
✗	Appropriate Amount of Patience
✗	Will Build Trust
🚩	Good Listener
✗	Healthy Skepticism

We look at presenting in a way that might be different from how you have historically viewed it. Today's modern salesperson should sell consultatively and present solutions to fully qualified prospects. Most salespeople fail to do that, presenting far too early in the sales process. The following table shows whether or not Name is presenting at the right time, to the right people, and for the right reasons. We also show whether or not Name is overly presentation-minded by identifying Teresa's presentation tendencies, or the degree to which Name relies on presentations to sell.

 The Presentation Approach and Context Competency 90	
✓	Emphasizes Listening over Talking
✓	Able to Minimize Talking about Company Products or Solutions
✓	Not Compelled to Present
✓	Not Overly Reliant on Educating and Presenting
✓	Does Not Believe Presenting Equates to Controlling the Sales Process
✓	Does Not Believe Making A Proposal is the Most Important Part of the Sales Process
✗	Not Compelled to Propose or Quote
✗	Asks Enough Questions
✗	Takes Nothing for Granted

This table shows the combined impact of the factors that affect closing.

Combined Impact of Competencies 1	
✗	Sales Process
✗	Consultative Selling
✗	Selling Value
✗	Qualifying
✓	Presentation Approach
✗	Closing

Name currently lacks the basic elements required for effectively closing the sales that do not close easily.



Name believes that Prospects that think it over will eventually buy from me



Name believes that I understand when my prospects want to think it over



Name believes that I understand when my prospects want to comparison shop






Name believes that Any lack of results is due to the economy or marketplace



Name believes that Any lack of results is due to my competitors

DOES Name FOLLOW AN EFFECTIVE SALES PROCESS?

It is of the utmost importance to have a customized, milestone-centric sales process. Without it, so much time can be wasted with a given prospect in a particular sales cycle when crucial milestones are unknowingly skipped. An effective process assures consistent, favorable outcomes and generally prevents salespeople from wasting their valuable time on opportunities that are unlikely to close, especially when sales cycles are long. Without a doubt, a powerful sales process with clearly defined milestones provides more consistent, predictable and profitable results.

   **The Milestone-Centric Sales Process Competency** 49

- Follows Stages and Steps
- Process Has Most Key Milestones
- Process Has Adequate Sequence
- Consistent and Effective Results
- Little Wasted Time
- Has and/or Follows an Effective Process
- Uses an Effective Approach
- Relationship-Based
- CRM Savvy
- Strategic Use of Sales Scorecard

As mentioned previously, Name does not have an effective sales process in place.




Name believes that
It is appropriate to spend significant time with prospects that don't buy from me

WILL TERESA'S SALES FORECASTS BE ACCURATE?

The pipeline is a commonly used term for the flow of opportunities being pursued by you. New opportunities enter the pipeline and sold or lost opportunities exit the pipeline. It is a very simple concept with major implications. The pipeline can be represented as a useless spreadsheet or it can be the single most important predictor of success in the entire business.

If the pipeline is the most important predictor of future business success, then how does Name measure up in that area?

The Qualifying Competency helps us to understand how thoroughly Name qualifies opportunities. Here, the percentage is an accurate guide to how well, how often and how effectively Name is qualifying. Remember, this Competency has a tremendous impact on the accuracy of the pipeline and forecast.




 **The Qualifying Competency** 48

- Meets with Decision Maker
- Uncovers Actual Budget
- Will Discuss Finances
- Knows Decision-Making Process
- Can Influence the Decision-Making Process
- Handles High-Ticket Pricing OK
- Doesn't Let Being Liked Get in the Way
- Able to Stay in the Moment
- Self-Limiting Beliefs Won't be an Obstacle
- Knows Why They Would Buy
- Asks about Everything
- Not Vulnerable to Competition

Name has fair qualifying skills and that may lead to inconsistent forecasts.

CAN Name MORE EFFECTIVELY LEVERAGE SALES TECHNOLOGY?

As selling continues to evolve, the role of technology is more important than ever. Salespeople use a variety of tools but the three that are most important are CRM, Social Media, and virtual selling over Video. Below we take a look at your capabilities in all three areas.

   **The Embracing Sales Technology Competency** 37

- The CRM-Savvy Competency** 95
- The Social Selling Competency** 0
- The Video Proficient Competency** 15

Regardless of the CRM platform being used, salespeople must engage with and embrace the software so that you know where in the sales process each opportunity is and what is required to get it closed; both the quantity and quality of the opportunities in your pipeline, and so that management has real time data about your opportunities and the pipeline.



The CRM-Savvy Competency

95

- ✓ Lives in CRM
- ✓ Embraces CRM
- ✓ Updates Account Information at Least Daily
- ✓ Tracks Milestones Met in Sales Process
- ✓ Notates All Conversations
- ✓ Currently/Typically Uses CRM
- ✓ Competent CRM User
- ✗ Has Experience with Multiple CRM Applications

More and more salespeople are using LinkedIn to connect with new prospects, and some are even using Twitter, Instagram and Facebook.



The Social Selling Competency

0

- ✗ Connected to Potential Customers/Clients
- ✗ Generates Leads through Social Selling
- ✗ Well Connected
- ✗ Posts/Shares Updates for Visibility
- ✗ Uses LinkedIn
- ✗ Uses Twitter for Business

With more selling than ever taking place remotely over video, it is more important than ever to develop skills for using and selling over a video platform.



The Video Proficient Competency

15

- ✗ Uses Video for Selling
- ✗ Frequent Video User
- ✓ Finds Video Useful
- ✗ Prefers Video to Phone
- ✗ Loves Video and Its Impact on Success
- ✗ Video Contributes to Success
- ✗ Uses Multiple Video Platforms
- ✗ Uses Accessories to Enhance Video

Teresa's use and proficiency with technology is fair so there is clearly some room for improvement. Keep in mind that the technology won't do the selling for someone, but it will make it easier for that individual to sell.

CAN Name WORK REMOTELY?

Your role specification calls for someone to effectively work remotely. Below, you will find the attributes of the Working Remotely Competency.



The Working Remotely Competency

37

- ✓ Works Independently
- ✗ Effective Time Management
- ✗ Self-Starter
- ✓ CRM Savvy
- ✗ Video Proficient

WILL Name EFFECTIVELY NEGOTIATE CONTRACTS?

The Negotiating Competency includes the skills that are suitable for negotiating the terms of a deal or contract.



The Negotiating Competency

30

- ✗ Seeks Win/Win
- ✗ Willing to Walk
- ✗ Appropriate Amount of Patience
- ✗ Able to Listen/Ask with Ease
- ✓ Able to Stay in the Moment
- ✗ Goal Oriented
- ✓ Problem Solver
- ✗ Doesn't Need to be Liked
- ✓ Rejection Proof
- ✗ Selling Value
- ✓ Will Discuss Finances

Name has a few of the attributes of a negotiator.

WILL Name EFFECTIVELY MANAGE EXISTING ACCOUNTS?

The Account Management Competency includes the skills that are suitable for account management, assigned accounts that one is to manage, handhold, solve problems, maintain and when possible, grow.



The Account Management Competency

29

- Has Strong Relationships
- Will Handle Organizational Politics
- Will Make Friends Everywhere
- Will Follow Up Often
- Will Meet/Talk with Decision Makers
- Will Know the Real Budgets
- Won't Feel Urgency to Close Business
- Won't Alienate People
- Will Focus on Current Accounts Rather than Looking for New Accounts
- Will Manage Time Effectively

Name has a few of the attributes of an account manager.

WILL Name GROW KEY MAJOR ACCOUNTS?

The Farming Competency includes the skills that are suitable for farming which we define as large assigned accounts where salespeople are responsible for growth across the enterprise.



The Farming Competency

20

- Attempts to Close
- Has Closing Urgency
- Won't "Understand" Most Objections
- Won't Panic Over Objections
- Handles "It's a Lot of Money" Objection
- Won't Accept Put-Offs
- Will be Very Likable
- Won't Alienate Customers
- Unlikely to be Distracted by New Accounts

Name has a few of the attributes of a farmer.