

Survey Summary of the 79 items

The ratings for each individual question are shown for easy analysis. The rating by both you and Sally Sample for each individual behavior provides detail calling for study and possible coaching or training at a very specific level. Any significant differences in both ratings should require immediate attention by both of you.



Sales Manager and/or Salesperson did not rate item



Bold Lettering: Items that fall in a Critical Skill Set, as designated by Salesperson and/or Sales Manager



Entrepreneurial Approach

Reflects entrepreneurial attitude

- 1. Displays and maintains a positive attitude
- 2. Accepts risk when necessary
- 3. Puts client's needs first
- 4. Practices high ethical standards
- 5. Works on improving skills
- 6. Communicates in positive terms
- 7. Able to handle rejection

S *Time optimization*

- 8. Recognizes optimal time for prospecting
- 9. Recognizes optimal time for servicing clients
- 10. Selects appropriate opportunities
- 11. Evaluates time management on a regular basis

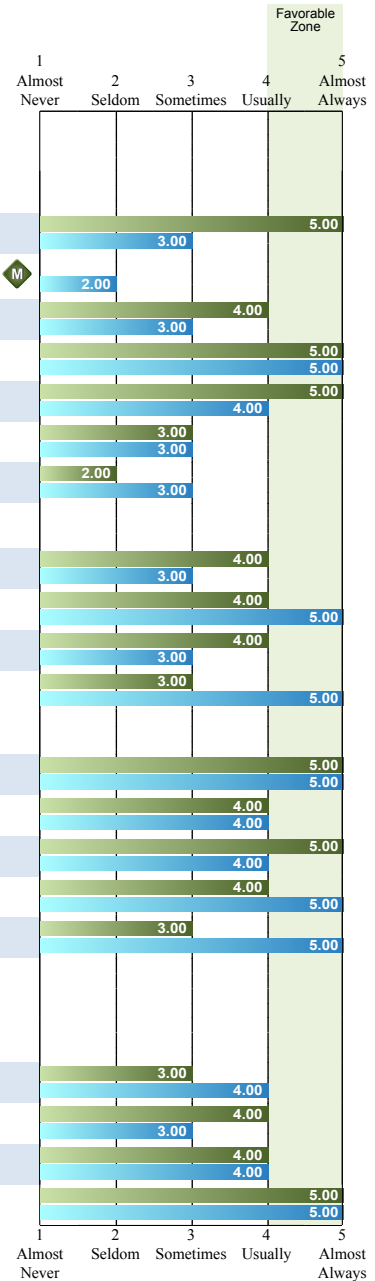
Sets effective goals

- 12. Develops goals that support overall objectives
- 13. Plans for how to achieve goals
- 14. Monitors progress toward goal achievement
- 15. Evaluates goal attainment process regularly
- 16. Holds self accountable for goal achievement

Understands the Prospect

S *Recognizes buyer behavior*

- 17. Able to identify personal and business agenda of prospect
- 18. Able to recognize prospect's problem or need
- 19. Recognizes how change affects need and opportunity
- 20. Guides prospect through the buyer decision making process





Sales Manager and/or
Salesperson did not rate item



Bold Lettering: Items that fall in a Critical Skill Set,
as designated by Salesperson and/or Sales Manager

Sales Manager
Salesperson

M *Understands the purchasing process*

21. Recognizes the role of the purchasing department in an organization	3.00	4.00
22. Responds to purchasing professionals' needs	3.00	4.00
23. Identifies the real decision makers in an organization	3.00	5.00

Develops Appropriate Solutions

M *Uses feature and benefit solutions*

24. Recognizes what constitutes a solution	3.00	3.00
25. Determines benefit by identifying features important to prospect	2.00	3.00
26. Focuses on prospect's needs rather than wants	3.00	4.00
27. Identifies and creates solutions for prospects	2.00	5.00

M S *Knowledge of products*

28. Develops expert knowledge of products	5.00	5.00
29. Recognizes problems that may be solved with products	2.00	4.00
30. Recognizes and understands the competition	4.00	5.00
31. Able to provide product knowledge to colleagues	2.00	4.00

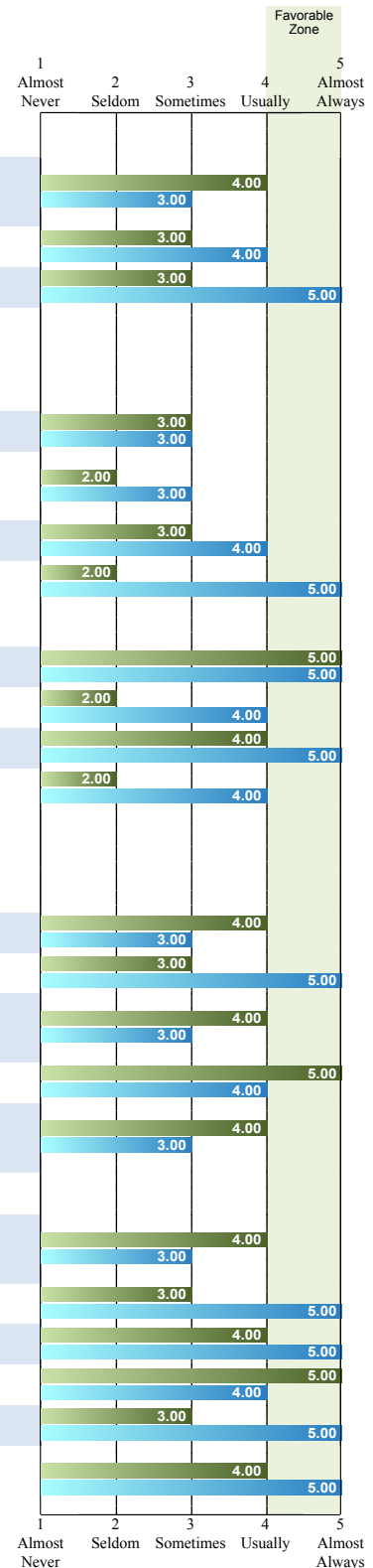
Prospects Proactively

M S *Identifies prospects*

32. Able to define ideal prospects	3.00	4.00
33. Researches prospect's situation and potential solution fit	3.00	5.00
34. Able to identify the correct person in an organization as a prospect	3.00	4.00
35. Uses a targeted prospect list	4.00	5.00
36. Generates lead through referrals, networking, associations, and centers of influence	3.00	4.00

Gets appointments

37. Able to provide relevant, compelling communications to prospects	3.00	4.00
38. Able to create a sense of urgency with a prospect	3.00	5.00
39. Provides a clear call to action for a prospect	4.00	5.00
40. Recognizes own ability to provide help to prospect	4.00	5.00
41. Refines and practices value propositions for each prospect	3.00	5.00
42. Able to use all forms of communication to apply value proposition	4.00	5.00





Sales Manager and/or
Salesperson did not rate item



Bold Lettering: Items that fall in a Critical Skill Set,
as designated by Salesperson and/or Sales Manager

Sales Manager
Salesperson

Manages Selling Process

Understands client-centric selling

- 43. Treats sales transactions as relationships
- 44. Synchronizes selling with prospect's buying process

Establishes rapport

- 45. Makes a good first impression
- 46. Builds credibility
- 47. Identifies specific linkages with prospect
- 48. Transitions efficiently to prospect's needs

Identifies prospect's needs

- 49. Recognizes the real needs
- 50. Establishes self as creditable resource
- 51. Uses active listening well
- 52. Displays appropriate empathy
- 53. Uses questions effectively

Counsels prospect

- 54. Demonstrates understanding of prospect's needs
- 55. Educates prospect on their primary needs
- 56. Raises prospect's urgency
- 57. Presents product as solution

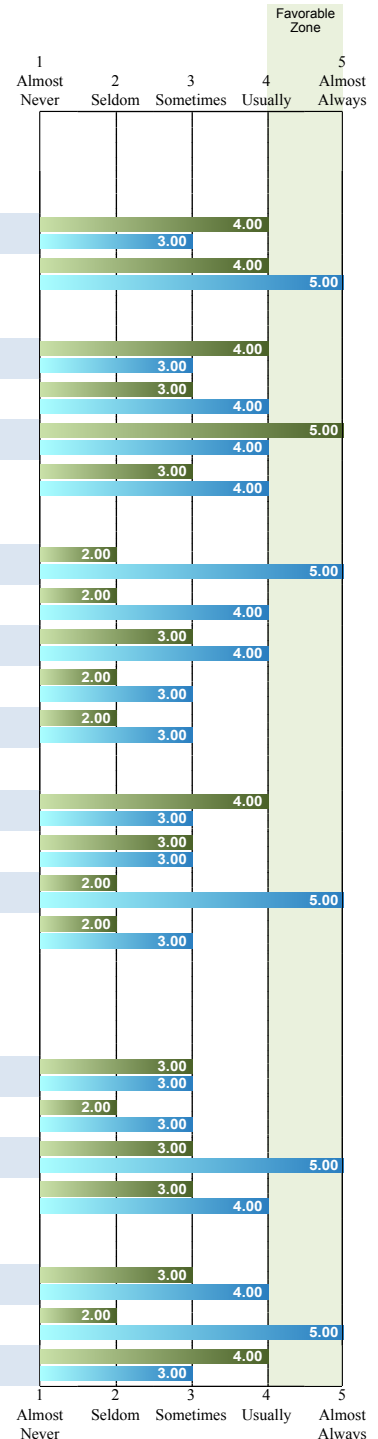
Closes the Sale

Explores prospect's options

- 58. Prepares prospect for different solution to their need
- 59. Involves prospect in exploration process
- 60. Acts appropriately as an expert
- 61. Presents correct solutions

M S *Presents ideal solution*

- 62. Involves prospect in evaluation process
- 63. Offers well-thought-out solutions
- 64. Guides prospect's selection of solution





**Sales Manager and/or
Salesperson did not rate item**



Bold Lettering: Items that fall in a Critical Skill Set,
as designated by Salesperson and/or Sales Manager

Sales Manager
Salesperson

Overcomes objections

65. Identifies basis for objection	2.00	4.00
66. Acknowledges legitimacy of the question	4.00	4.00
67. Clarifies the facts for the prospect	2.00	4.00
68. Responds with concise information	3.00	5.00

Closes effectively

69. Identifies each step of sales process for prospect	4.00	4.00
70. Ensures all prospect's concerns have been satisfied	5.00	5.00
71. Uses a variety of closing techniques	2.00	5.00

Manages Sales Relationships

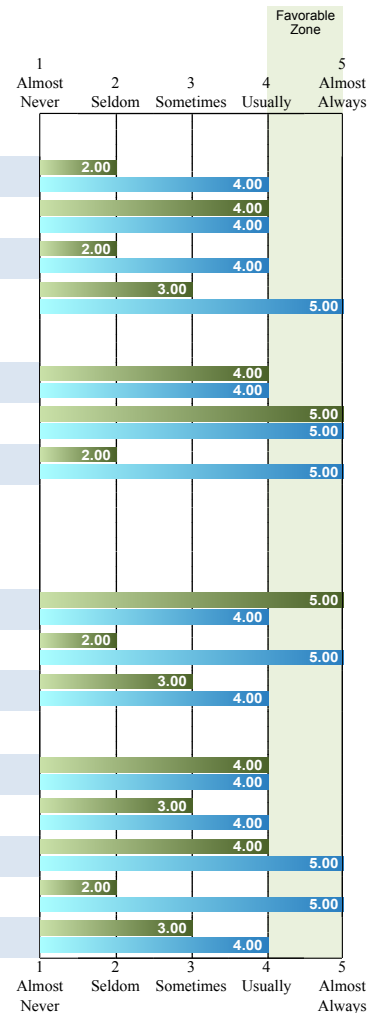


Secures the relationship

72. Follows trends affecting prospects and clients	5.00	4.00
73. Builds reputation with the prospects and clients	2.00	5.00
74. Becomes an advocate for the clients	3.00	4.00

Develops the relationship

75. Keeps clients loyal	4.00	4.00
76. Maintains communication with clients	3.00	4.00
77. Maintains honesty with clients	4.00	5.00
78. Utilizes up-selling and cross-selling where appropriate	2.00	5.00
79. Obtains referrals from clients	3.00	4.00



Development Summary Overview

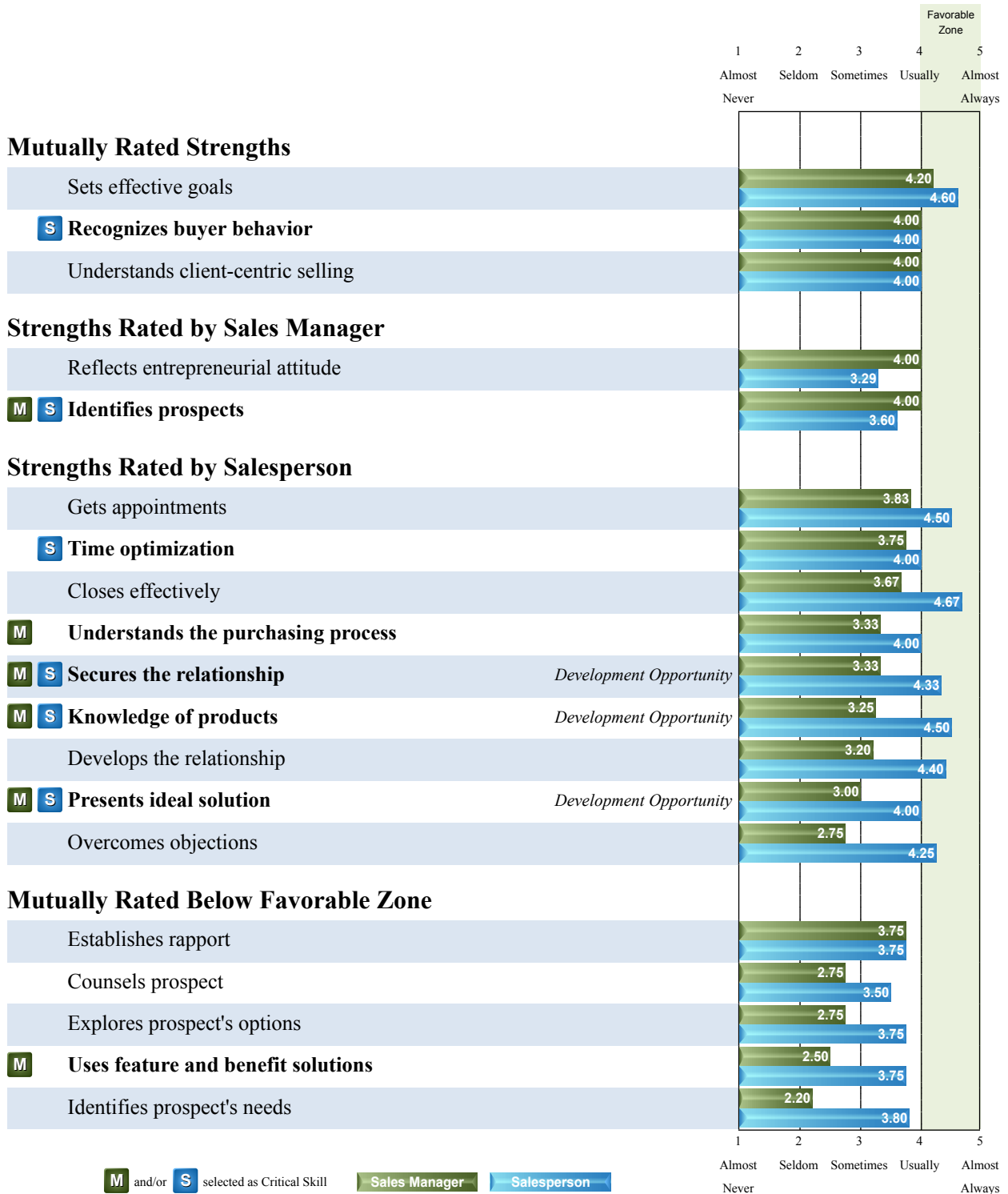
This section reviews the average ratings for each Skill Set. Both ratings for you and Sally Sample are shown. In this section we have grouped the Skill Sets based on the average ratings and where they fall in relation to the Favorable Zone.

The results for each Skill Set are sorted and grouped together based on whether you and Sally Sample identified them as critical. Within each grouping, scores are sorted by average rating for each Skill Set based on the average scores you provided. Here is how the results are grouped:

- **Mutually Rated Strengths** – The Skill Sets shown here are those which both you and Sally Sample rated in the Favorable Zone. These are clearly strengths that should be emphasized, but they should not be glossed over as there is always room for improvement. Discussions should focus on how to use these strengths to help develop those areas that may need improvement.
- **Strengths Rated by Sales Manager** – These Skill Sets are those where only your average scores were in the Favorable Zone. There should be open communication between you and Sally Sample to determine reasons for the differences between these ratings. It is important to align the expectations of Sally Sample with your expectations regarding these Skill Sets whenever possible.
- **Strengths Rated by Salesperson** – Sally Sample rated these Skill Sets in the Favorable Zone, but you did not agree. Meet with Sally Sample to understand why some of the behaviors were found wanting. Work together to align your expectations with regard to these Skill Sets with the expectations of Sally Sample.
- **Mutually Rated Below Favorable Zone** – Obvious opportunities for development are the Skill Sets that neither of you rated in the Favorable Zone. Training should be considered to help Sally Sample become more effective in these sales activities. Pay particular attention to those Skill Sets identified as critical by either of you.

Also identified are three Development Opportunities. These Development Opportunities represent an excellent opportunity for the enhancement of the sales effectiveness of Sally Sample. They were identified utilizing a combination of average ratings and their identification as critical to success (Critical Skill Set) by you both. As a result, some may fall either within or below the Favorable Zone. Regardless, each should become an important part of your sales ability development for Sally Sample.

Here are the Skill Sets grouped according to how the average ratings fell in regard to the Favorable Zone. You should note the Development Opportunities that are suggested with these results; particularly where a Skill Set has been identified as critical. Of course, if a large variance between both of your ratings exists, a discussion is warranted.



M and/or **S** selected as Critical Skill **Sales Manager** **Salesperson**

Management Considerations

January 2, 2013

Regarding Sally Sample

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Profiles  International
imagine great people®

Working with Sally Sample

To effectively manage the information provided in the Sales CheckPoint report we recommend working with Sally Sample to create an Action Plan to improve the skills deemed most critical to sales success. Think of the Action Plan as any other project or sales plan. Design the plan to be realistic, to consist of actions Sally Sample can take every day on the job, and to tie directly to sales priorities.

In the Sales CheckPoint report Sally Sample was encouraged to meet with you to develop this Action Plan. Your role is to coach Sally Sample on situations related to the Action Plan, provide feedback, and reinforce acceptable behaviors. Providing this input will help fulfill the intent of the Action Plan and bring a better understanding between you and Sally Sample.

An Action Plan Worksheet is provided for both you and Sally Sample. Before you meet with Sally Sample you will want to consider the following things:

- **Agreement of Critical Skills Alignment** – Look for where Sally Sample agreed with you on the skills you deemed most critical to success in sales.
- **Variance in Critical Skills Alignment** – Take note of the Skill Sets that you and Sally Sample did not agree were critical. Prepare to discuss your perceptions of each of these skills and the reasons for selecting these as critical. Look for opportunities to create alignment where possible.
- **Gaps in Perceptions** – If Gaps are indicated be prepared to explain your perception of this Skill Set and the reasoning why you gave it the rating you did.

While you are working through this worksheet with Sally Sample keep the following in mind:

- **Agreement of Critical Skills** – Acknowledge where there is alignment and ask if Sally Sample has any further questions. Use this as an opportunity to reinforce the areas where there is alignment between you and Sally Sample.
- **Critical Skills Selected Only by Sally Sample** – Seek to understand why Sally Sample felt that the Skill Set was critical. Don't put Sally Sample on the defensive but search for ways to bring alignment between you both.
- **Critical Skills Selected Only by You** – Explain why you selected those Skills Sets as critical. These areas of misalignment offer an excellent opportunity to improve communication and understanding between you and Sally Sample.
- **Development Opportunities** – Discuss each Skill Set listed. If a Skill Set has a Gap indicated, this suggests a discrepancy in the perception between you both. Talk about what these skills mean to both of you and your expectations.
- **K-S-S Method** – Review the steps of this method with Sally Sample. Emphasize the practical simplicity of this system.
- **Action Steps** – Help Sally Sample set a reasonable target date to implement the **K-S-S** method for each Skill Set. Work with Sally Sample to develop practical actions to Keep, Stop, and Start Doing. Make sure they are realistic and lead to development of that skill.

- **Additional Opportunities for Development** – Add any additional skills that you both feel need improvement. There is no rule that says you can't have more than three Development Opportunities but remember – less is more manageable.

Your role in assisting Sally Sample to improve on these Skill Sets does not end with this initial meeting. Shortly after your meeting with Sally Sample you will want to accomplish the following:

- **Schedule Follow-up Meetings** – You will need to check on the progress that Sally Sample is making in personal sales development.
- **Provide Training Resources** – Look for a sales training system which can be targeted to the specific needs Sally Sample has. There are a variety of sales training programs available. Suggest a sales training system which targets the specific needs of Sally Sample. It should provide live facilitation along with coaching methods to reinforce learning, increase goal accountability, and drive Sally Sample toward the desired results.
- **Schedule the next Sales CheckPoint** – This will provide tangible data as to the progress being made with Sally Sample.

As the Sales Manager there are many resources available to you to assist Sally Sample in improving the sales skills that you both defined in the worksheet. You may find some self-study materials or workshops that are relevant. Perhaps your organization has some current training programs that will be useful. Profiles International has additional assessments and consulting services that have proven useful to others. Your Profiles International Sales Representative is a valuable resource to help meet these needs. Contact your Profiles representative today.

For your reference,
the remainder of this report is a copy of what was provided to Sally Sample
in the Sales CheckPoint Individual Feedback Report.

Action Plan for Sally Sample

You cannot risk leaving your sales development to chance; planning is essential. How many times have you stated to yourself or others your intentions to act but fall back into old habits? Successful Salespeople follow through on development plans when the development need is directly linked to a sales challenge or pain point. The most significant development opportunities take place on the job and are totally under your control.

People tend to play to their strengths – choosing to utilize one sales skill over another due to their personal proficiencies. They have the knowledge and experience to use certain skills in almost any situation. If you don't favor or simply lack proficiency with a sales skill that is deemed important to being successful, there are two steps you can take immediately.

1. First, if you know what to do differently to improve a skill or behavior, do it!
2. Second, create an Action Plan. Your plan need not be complex. Most often, your best course of action for personal and professional growth and development is obvious and easy to recognize.

The results from the Sales CheckPoint you recently completed identified the following Development Opportunities, although there might be others that are identified as you go through this process.

- **Presents ideal solution** – Demonstrates an understanding of prospect's needs and desires and uses product expertise to provide viable options for a solution.
- **Knowledge of products** – Displays expert knowledge of products and services and uses this knowledge to quickly and effortlessly address a prospect's needs.
- **Secures the relationship** – Stays in front of client and prospect's needs and establishes opportunities to generate contacts and do more business with them.

The following Action Plan Worksheet will aid you in developing your next steps to improve the skills deemed most critical in enhancing your sales behaviors and, therefore, your income. Your Action Plan is designed to be realistic, will consist of actions you can take every day on the job, and will tie directly to the sales priorities identified by both you and your Sales Manager.

The K-S-S method proves to be extremely successful when trying to improve behaviors and consists of three simple steps:

- K** = actions you should **KEEP** doing, which are things you already do well. **KEEP** doing them!
- S** = actions you should **STOP** doing. If you recognized sales behaviors that bring negative results while you analyzed your Sales CheckPoint – it was an indication of something you should **STOP** doing.
- S** = actions you should **START** doing. You have learned things you could be doing to enhance your sales effectiveness. **START** doing them at the earliest opportunity. As you add to your knowledge base and acquire ideas for better sales performance, form the habit of doing them. Make **START** doing a regular part of your development process.

Your Action Plan Worksheet is an effective tool to help improve your selling abilities. It consists of three elements.

Critical Skills Alignment Summary

- Review the Critical Skill Sets selected by you and your Sales Manager that were displayed on the "Critical Skill Set Alignment" page in your Sales CheckPoint report.
- Notice where there is alignment with you both. A discussion with your Sales Manager about what each skill means to you both will help clarify any differences in observations.
- Next, look at the Skill Sets where you both did not agree. Discuss with your Sales Manager the differences in your opinions in an effort towards alignment on these Skill Sets.

Development Summary Overview

- Review each Development Opportunity identified in the "Development Summary Overview" page of your report. Underneath the Skill Set you will see the scores for both you and your Sales Manager and an icon to indicate whether this Skill Set is a Talent, Focus, or has a Gap. Where there is a Gap a discussion with your Sales Manager concerning your different perceptions is important
- To the right of this information there is an area to write down the changes you plan to make to improve on this vital Skill Set. Using the K-S-S method write down one or two actions that you plan to Keep, Stop, and Start Doing.
- Your actions may include discussions with your Sales Manager, detailed reviews of the behaviors contained in a given Skill Set, a request for clarification about a specific rating that your Sales Manager provided, and working to improve communication between you and your Sales Manager.
- Decide on a target date that you and your Sales Manager feel you can implement the Action Steps for this skill.

Additional Development Opportunities

- This section is used just like the section above it – Development Summary Overview. Use this area to add more Skill Sets if you and your Sales Manager agree on them.

Refer to your Action Plan Worksheet often. Don't leave your sales future to chance. Now is the time to take action! Review your Sales CheckPoint Report. Set an appointment to complete your Action Plan with your Sales Manager. Follow through with your Action Plan.

Action Plan Worksheet

Discuss the available resources with your Sales Manager to help you reach these goals. An excellent choice is an online sales training system which will allow you to work at your own pace.

Critical Skills Alignment Summary		
Sales Manager	Both	Salesperson
<ul style="list-style-type: none"> ✓ Understands the purchasing process ✓ Uses feature and benefit solutions 	<ul style="list-style-type: none"> ✓ Knowledge of products ✓ Identifies prospects ✓ Presents ideal solution ✓ Secures the relationship 	<ul style="list-style-type: none"> ✓ Time optimization ✓ Recognizes buyer behavior

Development Summary Overview	
Development Opportunities	My Action Steps
<p>Presents ideal solution</p> <p>M – 3.00 S – 4.00</p>	<p>Target Completion Date: _____</p> <p>Keep Doing: _____</p> <p>_____</p> <p>Stop Doing: _____</p> <p>_____</p> <p>Start Doing: _____</p>
<p>Knowledge of products</p> <p>M – 3.25 S – 4.50</p>	<p>Target Completion Date: _____</p> <p>Keep Doing: _____</p> <p>_____</p> <p>Stop Doing: _____</p> <p>_____</p> <p>Start Doing: _____</p>

Development Summary Overview

Development Opportunities

Secures the relationship

M – 3.33

S – 4.33

My Action Steps

Target Completion Date: _____

Keep Doing: _____

Stop Doing: _____


Start Doing: _____

Additional Development Opportunities

Development Opportunities

M – _____

S – _____

Talent Focus 
Circle one if appropriate

My Action Steps

Target Completion Date: _____


Keep Doing: _____

Stop Doing: _____

Start Doing: _____

M – _____

S – _____

Talent Focus 
Circle one if appropriate

Target Completion Date: _____

Keep Doing: _____

Stop Doing: _____

Start Doing: _____

Additional Development Opportunities

Development Opportunities

My Action Steps

M — _____
S — _____

Talent **Focus** **Gap**
Circle one if appropriate

Target Completion Date: _____

Keep Doing: _____

Stop Doing: _____

Start Doing: _____