

Sam Sample
27 Mar 2013

DECISION MAKER

SALES ROLES

**SOLUTIONS
DEVELOPMENT**



GUIDE TO USING THIS REPORT

INTRODUCTION

The sales function is the lifeblood of most organisations. It can exponentially grow revenue and cement a business' success. Studies have consistently shown that the calibre of the sales force is directly related to sales success and organisational growth. Fortunately, sales effectiveness is a skill that can be identified and developed. The sales questionnaire assesses a range of personality and motivational characteristics that represent a tendency towards effective sales behaviour.

This report uses Sam's profile results to investigate the likelihood he may exhibit certain types of sales related behaviour. This particular report is intended as a tool to facilitate his personal development, rather than as an assessment tool, it can be used as a starting point either:

- To explore possible development needs with him, and produce a shared development strategy for promoting his competence in those dimensions that are work relevant, or
- To consider reasons for any possible discrepancies between his predicted behaviour and his actual performance as assessed by peer ratings, performance appraisals, etc.

REPORT SECTIONS

The "Development" report presents Sam's profile results in the following sections:

Sales Process Overview

Provides a summary of Sam's results against the sales process. This section also highlights Sam's potential strengths and areas of potential risk within the sales process phases.

Development Planning

Provides more detailed information regarding Sam's performance on each of the profile's dimensions. The section also provides development recommendations and a framework for creating a development plan.

Sales Culture Fit Overview

Provides a summary of Sam's fit to different types of roles or work environments.

DISCLAIMER

This assessment is only an indicator. Therefore, it is recommended that decisions on recruitment, promotion, career guidance and development are made in conjunction with other relevant information and not solely on the information in this report. The authors and distributors accept no responsibility for decisions made using this tool and cannot be held directly or indirectly liable for the consequences of those decisions.



CONTEXT

The profile arises from a personality questionnaire. It must be interpreted in the context of other relevant factors such as experience, training, and wider skills. For example, Sam's past performance can be assessed through a critical review of references, his work history and previous qualifications, and via a structured interview. His level of job specific knowledge can be assessed via the use of work sample tests and simulations, and behavioural interviews. Finally, his skills can be assessed in greater detail through behavioural observation, role-plays and assessment centre exercises. The profile should also be considered in light of the organisation's sales process and culture.

DIMENSIONS

The behaviours/dimensions used in the questionnaire are derived from a typical sales process framework. This particular model was selected to provide a clear picture of respondents' capabilities within a framework familiar to most sales professionals and trainers.

SALES PROCESS PHASES

Building Contacts (Prospecting)

Investigates the individual's ability to build contacts. It includes the following dimensions:

- **Looks for opportunities** - The ability to seek opportunities and take advantage of them.
- **Outgoing and engages others** - The ability to approach others and initiate contact in order to build a network of sales contacts and leads.
- **Builds close personal relationships** - The ability to build close personal relationships with clients.

Needs Assessment (Qualifying)

Investigates the individual's ability to assess customer needs. It includes the following dimensions:

- **Seeks to understand needs** - The ability to be attentive to the needs of his clients when qualifying leads.
- **Seeks to find value** - The ability to create value by linking clients' needs to relevant products and services.
- **Qualifies opportunities** - The ability to categorise leads according to practical sales outcomes and identify when to disqualify leads which are not likely to yield results.

Style and Presentation (Pitching)

Investigates the individual's ability to present ideas and concepts to others. It includes the following dimensions:

- **Social presence** - The ability to gain and hold the attention of others.
- **Persuasive** - The ability to be a persuasive speaker and convincing others of his point of view.
- **Adaptive and conforming** - The ability to adapt his selling style to closely fit the sales situation and buyer expectations.

Negotiation (Closing)

Investigates the individual's ability to negotiate with customers and close sales. It includes the following dimensions:

- **Assertive** - The ability to move sales situations forward without being aggressive or coercive.
- **Conflict handling** - The ability to deal with customer objections in a professional and constructive manner.
- **Diligent and persevering** - The ability to pursue a sale until all avenues have been explored and exhausted.

Follow-up (Supporting)

Investigates the individual's ability to follow-up on the sale after closure. It includes the following dimensions:

- **Service and support** - The ability to show dedication to customer satisfaction and provide after-sales support to customers.
- **Process oriented** - The ability to work with sales processes and procedures, complete sales related paperwork and track sales results.
- **Stress management** - The ability to overcome difficulties and face challenges with confidence and optimism.



In addition to describing Sam's likelihood to perform against the sales process model, the report also provides insights into the types of roles or environments he is more likely to be comfortable working in.

SALES CULTURE CONDITIONS

Roles which require salespeople to work under pressure

Roles which require salespeople to exercise diplomacy

Roles which require salespeople to address the public and give presentations

Roles which require salespeople to work with each other

Roles which require salespeople to work in a competitive environment

Roles which require salespeople to work long hours

Roles which require salespeople to maintain high standards

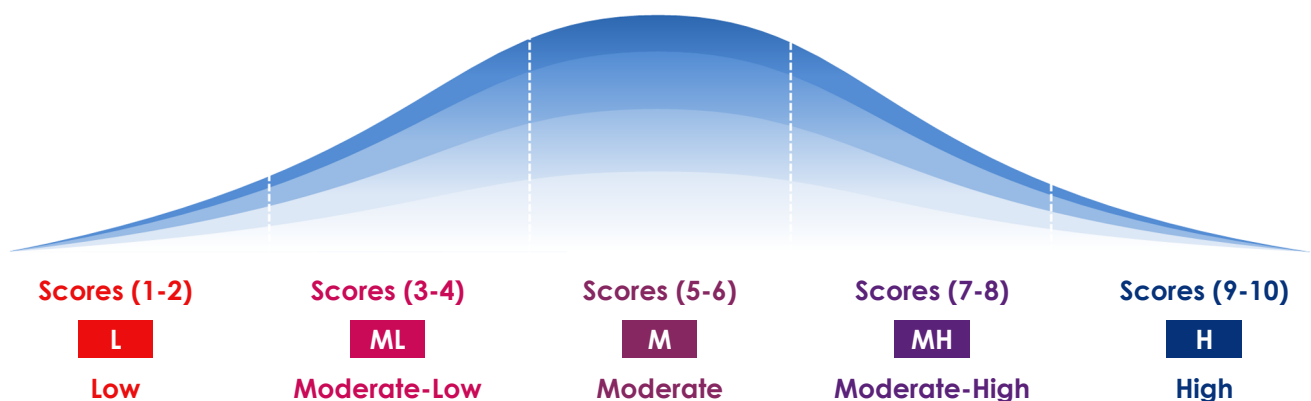
Roles which require salespeople to work under constantly changing conditions

Roles which provide salespeople with financial rewards and incentives

RESULTS SCALE

A reference group is used to evaluate Sam's results and determine his tendency to exhibit effective sales behaviours in the workplace compared to others. His results are presented as standardised scores on a scale of 1 to 10.

The following chart represents a distribution of individuals on a particular scale, where high scores represent greater tendency to behave in a particular manner and low scores represent a reduced likelihood of behaving in a particular manner. An overall level ranging from a "Low" to a "High" tendency is provided to help highlight areas of concern.



RESPONSE STYLE

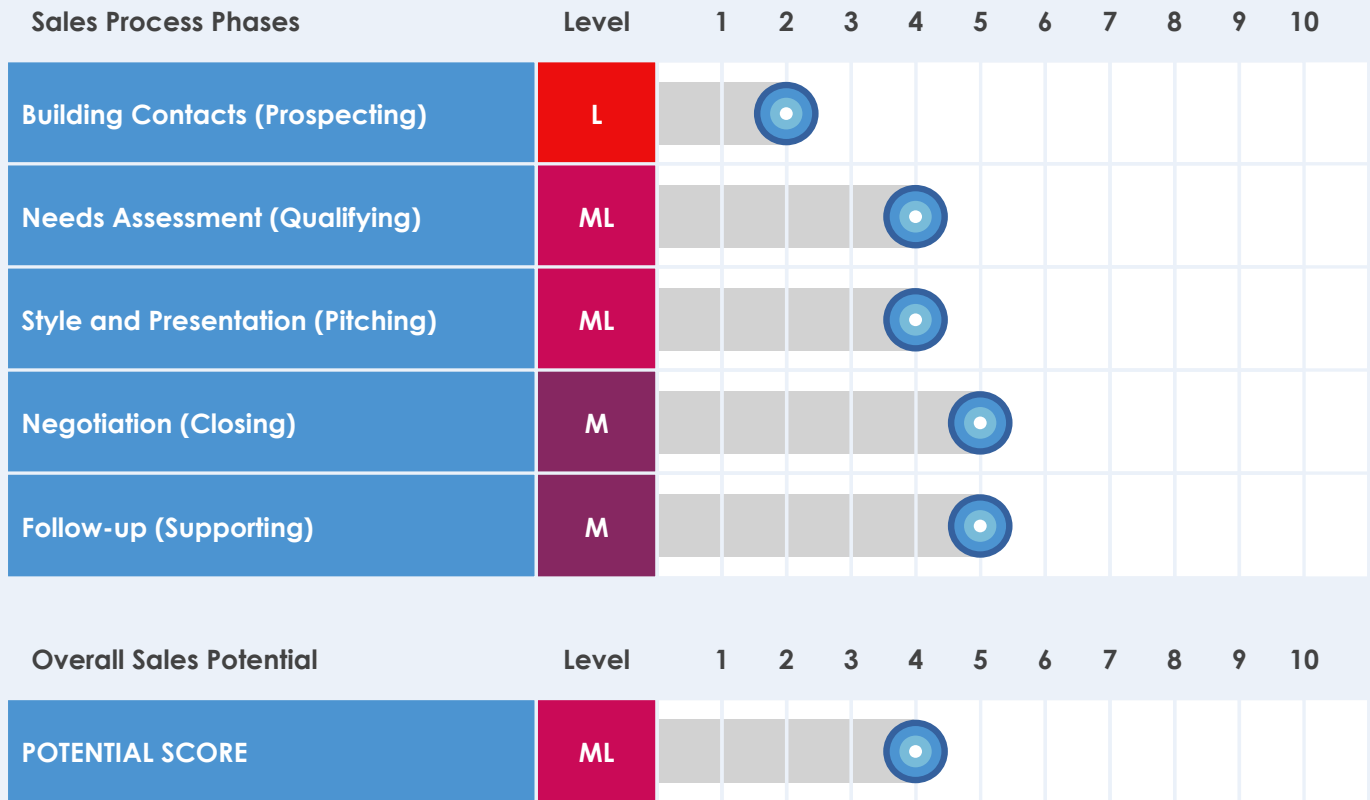
The pattern of responses Sam obtained on the assessment indicates that he is fairly unlikely to have been biased by any desire to present himself in an unrealistically favourable light.



SALES PROCESS OVERVIEW

The overall sales potential score estimates Sam's tendency to exhibit effective sales behaviours in the workplace. It reflects a combination of personality and motivational characteristics related to sales performance within the various phases of the sales process.

SALES PROCESS PROFILE CHART





Profile Highlights

The following tables list the major strengths and potential areas of concern that can be inferred from Sam's responses to the questionnaire. Further details are available in the Development Planning Section.

POTENTIAL STRENGTHS

- Sam is likely to be as keen as most to move sales situations forward. Rather than adopt a coercive or aggressive closing style, he is likely to be able to work with clients and guide them towards closing the sale.
- Sam is fairly inclined to ensure that sales related paperwork is completed and he is more likely than most to track the progress of sales.

POTENTIAL RISKS

- He is unlikely to promptly grasp opportunities when they present themselves and he is significantly less motivated than most to pursue opportunities or take advantage of them.
- Sam is as likely as most to engage with potential clients, though he may not always be the one to initiate contact and may not be particularly well suited to selling to cold prospects.
- He is unlikely to be well suited to building close personal relationships with clients. He is, however, more likely to relate to people in a quite impersonal way, which may cause others to take a while to warm to him.
- Sam is not likely to show a great interest in understanding his client's needs when qualifying leads.
- He is less likely than most to cater to his clients' needs by accurately identifying value adding products and services.
- He is not likely to use light-hearted conversation to gain and hold the attention of others and he may not have as strong a social presence as most.
- While he is as inclined as most to adapt his style, he may not always conduct himself in a diplomatic and tactful manner and is at greater risk than most to inadvertently say things which others might find offensive or consider to be odd or out of place.
- While he is as likely as most to be patient when dealing with customer objections, he may not always deal with conflict in a constructive manner.
- Sam may not be motivated to diligently chase after sales and may be more prone than most to give up on difficult sales.
- He is less likely than most to show interest in providing after-sales support to customers or checking their satisfaction with the products or services provided.
- He is unlikely to become overly irritable when faced with difficult targets. Having said this, he may doubt his ability to overcome challenges.



DEVELOPMENT PLANNING

This section provides respondents with the opportunity for self-reflection and self-development. Work with Sam to define development goals based on the results of the profile.

Suggested development process:

1. Feedback and reactions
2. Selecting areas for development
3. Development plan

A detailed description of Sam's most likely behaviour on each of the sales process dimensions is provided in this section along with development recommendations. Please review these before working with him on the development plan.

**L DEVELOPMENT GUIDE: BUILDING CONTACTS (PROSPECTING)****L A. Looks for opportunities** - The ability to seek opportunities and take advantage of them.**Profile Description**

- The pattern of results Sam obtained on the assessment suggests that he is very cautious and restrained. As a result, he is unlikely to promptly grasp opportunities when they present themselves. In addition to this, he is significantly less motivated than most to pursue opportunities or take advantage of them.

Development Recommendations

- Prospecting can be one of the most difficult activities of the sales process. Remind Sam that this stage of the sales process requires initiative and effort. However, Sam may require motivation and encouragement to help him recognise opportunities and take advantage of them. Discuss possible implications and solutions with him. However, since this is primarily a motivational issue which cannot be remedied through standard training or development initiatives, Sam may need further support when conducting prospecting activities. Help him stay motivated by creating a plan that outlines clear goals and objectives and implement an action plan for achieving them. This may take the form of setting goals for the number of prospects he needs to contact each day as well as establishing a plan and routine for contacting prospect lists. This provides a sense of purpose that can keep sales representatives going during times of low motivation.

ML B. Outgoing and engages others - The ability to approach others and initiate contact.**Profile Description**

- Having obtained a pattern of results that indicates that he is as outgoing and socially bold as most people, Sam is as likely as most to engage with potential clients, though he may not always be the one to initiate contact. In addition to this, his profile indicates that he may become disheartened by rejection, which may further reduce his effectiveness at selling to cold prospects.

Development Recommendations

- Coach Sam on dealing with rejection. Fear of rejection is mostly related to insecurities which only Sam can deal with. However, you can remind him that it is the product or service that is being rejected and not to take the rejection personally. You can also ask him to create a list of "worst case scenarios" and help him work through them. Role plays against particularly aggressive or disinterested leads can also help Sam overcome any fears he may have. While coaching and role plays may be effective long-term solutions, try providing him with introductory spiels or scripts that cater specifically to dealing with rejection.

ML C. Builds close personal relationships - The ability to build close personal relationships with clients.**Profile Description**

- His profile indicates that he is unlikely to demonstrate a particularly friendly and personable nature and may not show an interest in other people. Consequently, Sam is unlikely to be well suited to building close personal relationships with clients. He is, however, more likely to relate to people in a quite impersonal way, which may mask his relatively trusting nature and cause others to take a while to warm to him.

Development Recommendations

- Building rapport is the foundation of making a sale, where it has been found that "likeability" is a determining factor for the success of a sale. Building rapport is about taking a genuine interest and curiosity in clients and starts at the initial stages of the sales process. If Sam is not adept at building rapport then provide him with sales training that includes conducting initial greetings, proper use of icebreakers and listening skills.

**ML DEVELOPMENT GUIDE: NEEDS ASSESSMENT (QUALIFYING)****ML A. Seeks to understand needs** - The ability to be attentive to the needs of his clients when qualifying leads.**Profile Description**

- Sam's responses on the questionnaire indicate that he may be distant and detached from others. As a result, he is not likely to show a great interest in understanding his client's needs when qualifying leads.

Development Recommendations

- Qualifying leads concerns using information about the lead to determine whether they are likely to buy or not. The key to qualifying leads is to ask questions. Encourage Sam to show more of an interest in understanding his clients' needs and work with him to develop a list of questions to meet this objective and which he can use as a reference.

ML B. Seeks to find value - The ability to create value by linking clients' needs to relevant products and services.**Profile Description**

- Despite Sam's profile suggesting that he is as materialistic as most people, his profile also indicates that he is less interested than most in understanding his clients' needs. As a result, he is less likely than most to cater to his clients' needs by accurately identifying value adding products and services.

Development Recommendations

- Product and sales training which focuses on linking feature and benefits to client needs may be of benefit to Sam's ability to qualify leads.

M C. Qualifies opportunities - The ability to categorise leads according to practical sales outcomes.**Profile Description**

- Sam's results suggest that he is as likely as most to adopt a calculating and Machiavellian approach to qualifying his leads, whereby he is as likely as most to categorise his leads according to practical sales outcomes. In addition to this, his preference to be relatively practical and shrewd should enable him to be as capable as most of realising when to disqualify leads which are not likely to yield results in order to focus his resources on leads with more potential.

Development Recommendations

- No development recommendations could be derived from Sam's profile on this dimension.

**ML DEVELOPMENT GUIDE: STYLE AND PRESENTATION (PITCHING)****ML A. Social presence** - The ability to gain and hold the attention of others.**Profile Description**

- The results of the questionnaire indicate that Sam is likely to be seen by others as being as confident and self-assured as most people in social settings. Having said this, his profile also indicates that he is likely to project a rather sober and serious outlook. Consequently, he is not likely to use light-hearted conversation to gain and hold the attention of others and he may not have as strong a social presence as most.

Development Recommendations

- Sam would likely benefit from training in presentation skills. You can also work with him on developing his ability to grab and hold the attention of his audience.

M B. Persuasive - The ability to be a persuasive speaker and convincing others of his point of view.**Profile Description**

- Sam's profile suggests that he is as likely as most to enjoy convincing others of his point of view. As a result, he is likely to be as persuasive a speaker as most, though he may not actively engage others or pursue them in order to win them over.

Development Recommendations

- No development recommendations could be derived from Sam's profile on this dimension.

ML C. Adaptive and conforming - The ability to adapt his selling style to closely fit buyer expectations.**Profile Description**

- His profile indicates that while he is as inclined as most to adapt his style according to his audiences' expectations, he may not be sensitive to the nuances of social settings. As a result, Sam may not always conduct himself in a diplomatic and tactful manner and is at greater risk than most to inadvertently say things which others might find offensive or consider to be odd or out of place.

Development Recommendations

- Adaptive selling involves altering sales behaviours based on information about the nature of the selling situation. Sam is likely to benefit from training which concentrates on reading customer cues in order to respond accordingly.

**M DEVELOPMENT GUIDE: NEGOTIATION (CLOSING)****MH A. Assertive** - The ability to move sales situations forward without being aggressive or coercive.**Profile Description**

- Inclined to be as competitive and assertive as most people, Sam is likely to be as keen as most to move sales situations forward. Rather than adopt a coercive or aggressive closing style, he is likely to be able to work with clients and guide them towards closing the sale. Consequently, this style is not likely to intimidate most clients.

Development Recommendations

- No development recommendations could be derived from Sam's profile on this dimension.

ML B. Conflict handling - The ability to deal with customer objections in a professional and constructive manner.**Profile Description**

- The results Sam obtained on the assessment indicate that he is, by nature, likely to be as calm and collected as most. As a consequence, he is as likely as most to be patient when dealing with customer objections. Having said this, his results also indicate that he is not as tactful and diplomatic as most and may not always deal with conflict in a constructive manner.

Development Recommendations

- Support Sam to respond with tact and diplomacy in high pressure conflict situations. There are many skills and techniques that can help manage conflict. Such skills and techniques are often taught as part of communication, conflict resolution or even customer service skills training courses. Coaching Sam on how to effectively deal with conflict and conducting role plays with "difficult" customers can also be of benefit.

L C. Diligent and persevering - The ability to pursue a sale until all avenues have been exhausted.**Profile Description**

- His profile indicates that he is not as resilient or achievement oriented as most. As a result, he may not be motivated to diligently chase after sales and may be more prone than most to give up on difficult sales.

Development Recommendations

- Most sales professionals will say that persistence and perseverance are some of the most important characteristics for success in sales. Remind Sam of the importance of trying different approaches and addressing all the client's objections and concerns before accepting that the client isn't likely to close. Diligence and persistence also involve following-up with clients. If Sam has trouble following-up on sales then help him develop a consistent and organised approach for follow-up.



M DEVELOPMENT GUIDE: FOLLOW-UP (SUPPORTING)

L A. Service and support - The ability to show dedication to customer satisfaction.

Profile Description

- Sam's responses to the questionnaire indicate that while he is quite accepting, he is less likely than most to show a great concern for clients. As a result, he is less likely than most to show interest in providing after-sales support to customers or checking their satisfaction with the products or services provided.

Development Recommendations

- Quite often sales people make the mistake of neglecting clients after the deal is closed. It is good practice for sales people to follow-up on their clients after they have come on-board. In addition to enhancing customer satisfaction and reducing post-sales attrition rates, this practice provides an opportunity for sales people to upsell products and services and helps generate referrals. Help Sam develop such a practice. Sam may benefit as well from attending basic sales or service training which focuses on upselling and generating referrals.

MH B. Process oriented - The ability to work with sales processes and procedures and track sales results.

Profile Description

- His responses to the questionnaire suggest that he is likely to believe it is important to work with sales processes and procedures. As a consequence, he is fairly inclined to ensure that sales related paperwork is completed and he is more likely than most to track the progress of sales.

Development Recommendations

- No development recommendations could be derived from Sam's profile on this dimension.

ML C. Stress management - The ability to face challenges with confidence and optimism.

Profile Description

- His profile indicates that he is likely to be as relaxed and composed as most. As a consequence, he is unlikely to become overly irritable if things go wrong or when faced with difficult targets. Having said this, his results also indicate that he may doubt his ability to overcome challenges and may not always strive to persevere in such situations.

Development Recommendations

- Help Sam build the confidence he needs to effectively deal with sales challenges.



1. FEEDBACK AND REACTIONS

Gauging Sam's reaction to the profile is essential to the interpretation of the results and is useful in determining a development plan. A copy of the "Feedback" report can be shared with Sam before discussing the results with him. Use the following questions to gauge his overall reaction to the feedback.

What did you learn from the results?

How did your perceptions of your sales style compare to those of the profile?

What areas did you agree with the most?

What areas did you disagree with the most?



2. SELECTING AREAS FOR DEVELOPMENT

Discuss with Sam which areas he would like to focus on for development after having reviewed the report's findings. Use this page as the basis for all agreed development plans.

	This development plans is for:	This development plans is overseen by:
Name	Sam Sample	
Position		
Signature		
Date		

The table below summarises the dimensions used in sales process framework. The areas which have been determined as most in "Need" for development from the profile have been marked with a check mark under the "Need" column, though users may also select other areas which they deem to be in need for development.

Sales Process Phase	Dimension	Need	Priority
Prospecting	Looks for opportunities	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Outgoing and engages others	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Builds close personal relationships	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Qualifying	Seeks to understand needs	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Seeks to find value	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Qualifies opportunities	<input type="checkbox"/>	<input type="checkbox"/>
Pitching	Social presence	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Persuasive	<input type="checkbox"/>	<input type="checkbox"/>
	Adaptive and conforming	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Closing	Assertive	<input type="checkbox"/>	<input type="checkbox"/>
	Conflict handling	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Diligent and persevering	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Supporting	Service and support	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Process oriented	<input type="checkbox"/>	<input type="checkbox"/>
	Stress management	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Dimensions selected as being in "Need" of development and which have also been selected as a "Priority" should be considered as part of Sam's development plan.



3. DEVELOPMENT PLAN

Please consider the following points in order to gain as much benefit from the development plan:

- Focus on the dimensions identified for development from the previous page.
- The development guides provide general recommendations for development. Use the development recommendations to help determine which development activities to pursue.
- Keep the objectives simple and measurable.
- Define how to monitor and evaluate progress.
- Use the provided form to put the plans in writing.
- Monitor Sam's progress through regular review meetings.

What areas do you wish to develop?

Why is it important or necessary to develop these areas?

How will you go about developing these areas?

Who do you need support from in order to achieve your development objectives?

When do you wish to achieve the desired development?

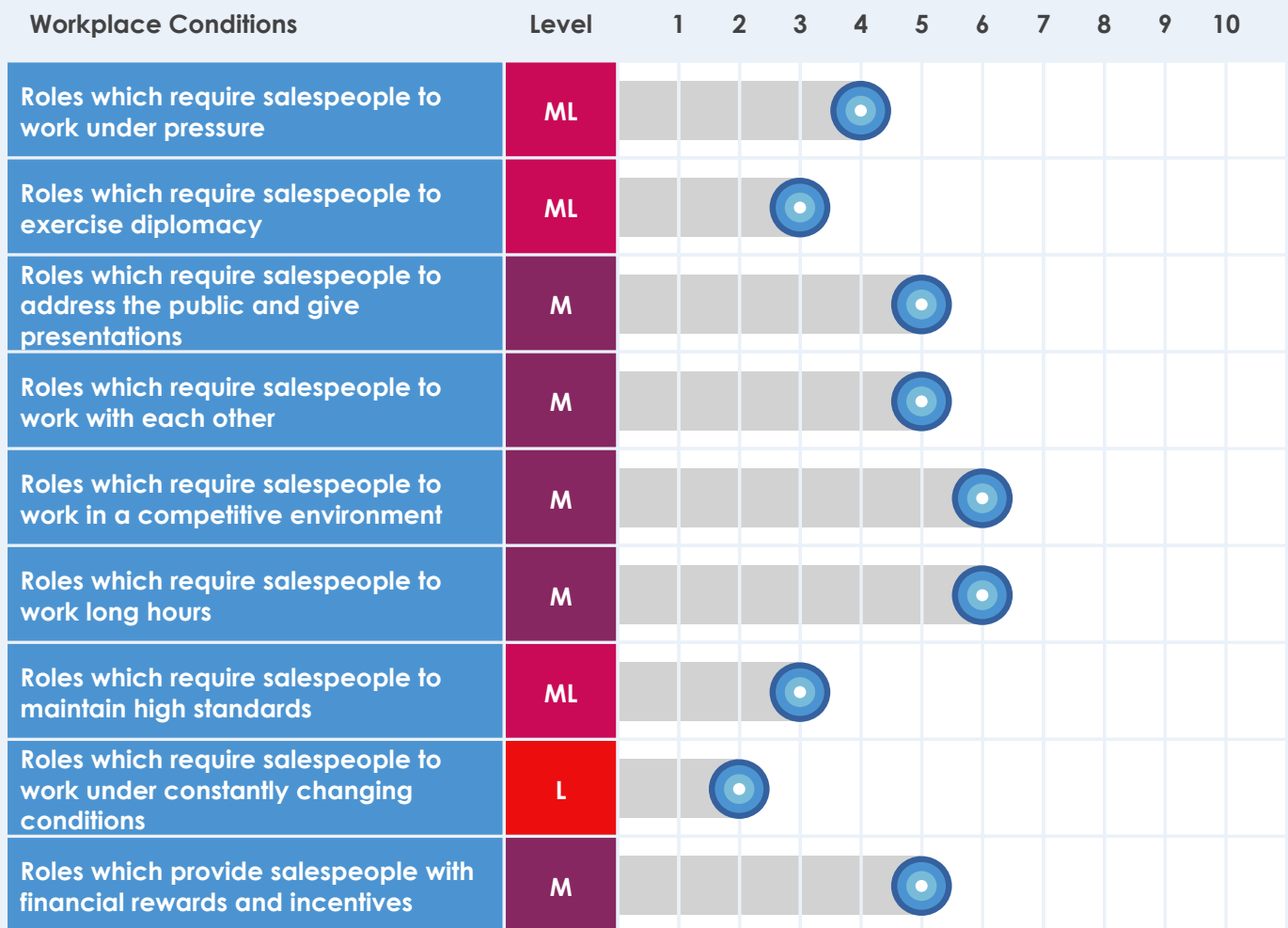


SALES CULTURE FIT OVERVIEW

The culture fit scores estimate Sam's preference to work under certain workplace conditions. Not all the conditions provided are relevant to all organisations, which is why it is recommended to identify which conditions best fit the culture of the organisation before exploring Sam's specific workplace preferences.

The results of the culture fit profile can help determine the types of motivators and environments that stimulate Sam and which, in turn, can help him perform at his best.

SALES CULTURE PROFILE CHART





SALES CULTURE PROFILE DESCRIPTIONS

ML Roles which require salespeople to work under pressure

While Sam's results suggest that he is likely to handle the stress of working in a pressured environment as well as most, he may not look forward to working in a setting that presents him with a lot of challenges to overcome and problems to resolve, and may not strive as much as most to overcome challenges.

ML Roles which require salespeople to exercise diplomacy

He is unlikely to be highly suited to settings which demand tact and diplomacy.

M Roles which require salespeople to address the public and give presentations

He would be expected to be as comfortable as most in roles which require public speaking and giving presentations to large groups of people.

M Roles which require salespeople to work with each other

His profile suggests that he is likely to feel as comfortable and at ease as most in work settings which require him to develop close working relationships with colleagues.

M Roles which require salespeople to work in a competitive environment

He is likely to be as content as most to work in reasonably competitive environments.

M Roles which require salespeople to work long hours

Sam's profile suggests that his work ethic is in the average range. As a result, he is likely to believe work is reasonably important, and he would be expected to be as committed to work as most other people are. Consequently, he is likely to fit as well as most in working environments that have a long-hours culture. He is likely to prefer settings where there is a fair amount to do and where he is kept reasonably busy.

ML Roles which require salespeople to maintain high standards of accuracy

Sam's profile on the assessment suggests that he is unlikely to be that achievement orientated and would not be expected to be motivated to produce work of a high standard. He is unlikely to gain that great a sense of satisfaction from knowing others consider him to be good at his job and, as a result, he is unlikely to function well in settings where very high standards of accuracy are expected.

L Roles which require sales to people to be able to work in a changing environment

Sam's profile indicates that he is relatively conventional and may not have the energy required to deal with the changes that come with working in a fast paced or rapidly changing environment. As a result, he is likely to be well suited to working on repetitive tasks and within a set routine.

M Roles which provide salespeople with financial rewards and incentives

He would be expected to be as comfortable as most in a culture where the primary motivation for employees is financial rewards.