Sam Sample

DECISION MAKER

SALES ROLES

SOLUTIONS
DEVELOPMENT

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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

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.
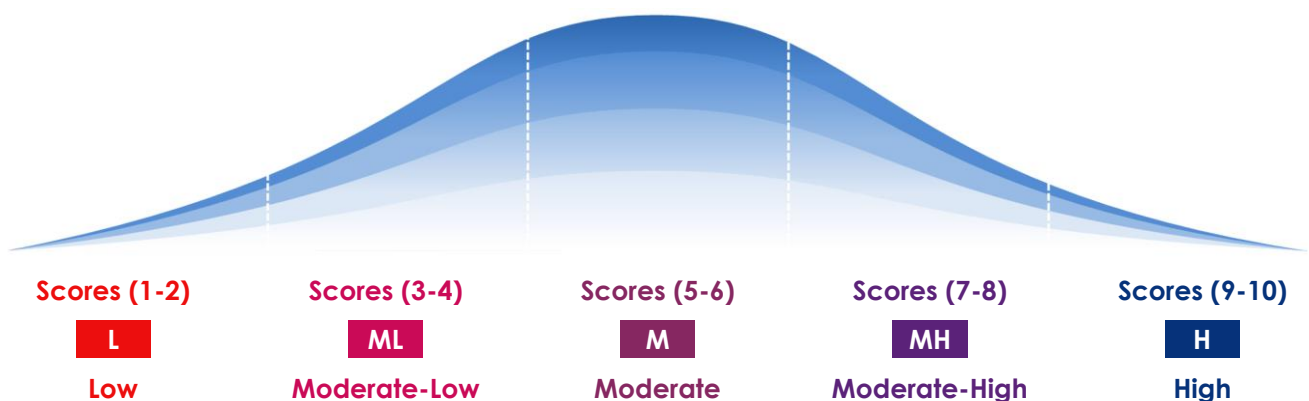
SALES CULTURE CONDITIONS

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.

Scores (1-2)	Scores (3-4)	Scores (5-6)	Scores (7-8)	Scores (9-10)
L	ML	M	MH	H
Low	Moderate-Low	Moderate	Moderate-High	High

RESPONSE STYLE

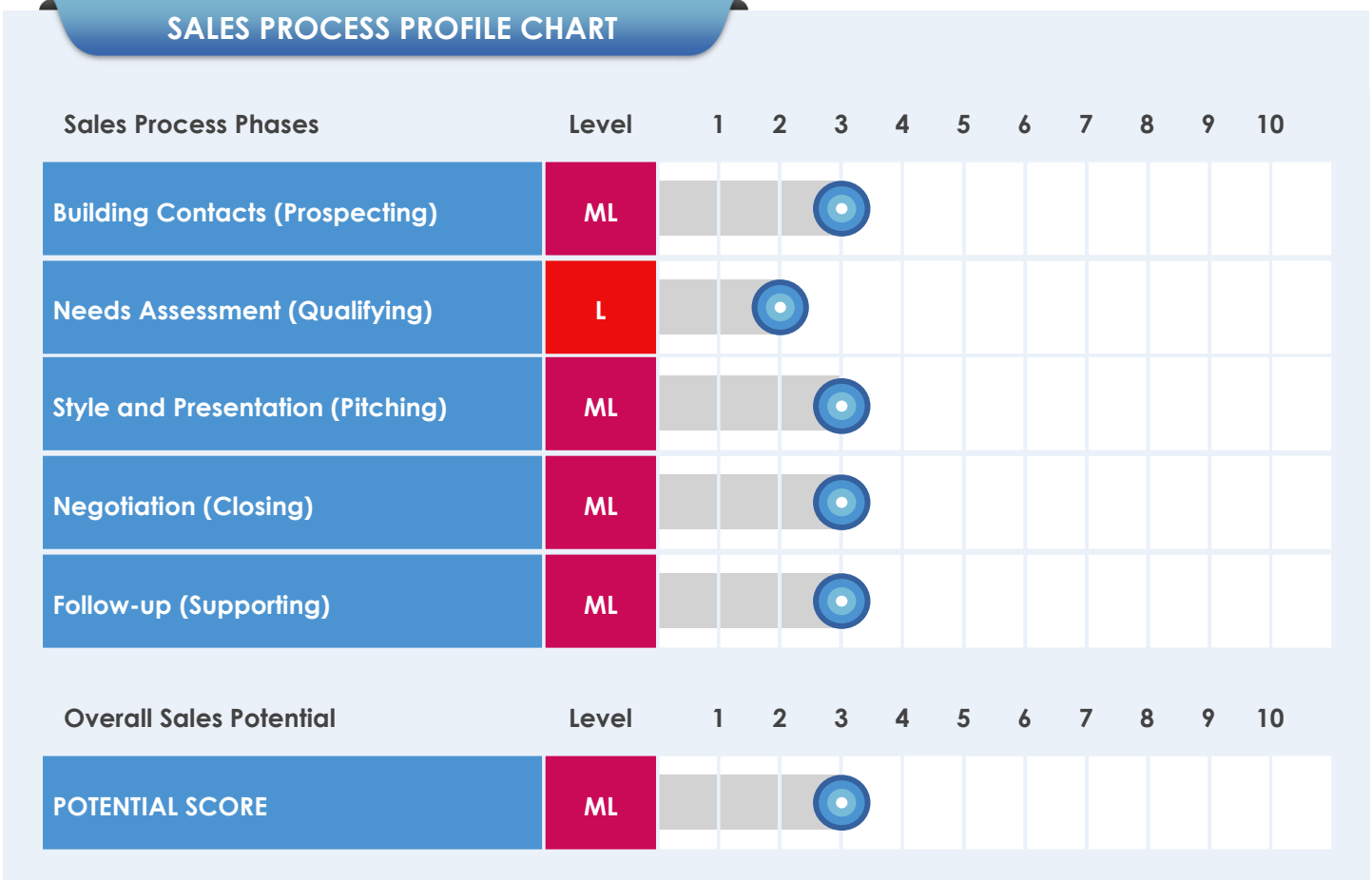The pattern of responses Sam obtained on the assessment indicates that he is likely to be extremely concerned to present himself to others in a positive light, with this possibly having biased his responses to the personality test. Assessors should therefore bear this presentational style in mind when interpreting his profile, and may wish to seek further evidence in support of the test's results.

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

Sales Process Phases	Level	1	2	3	4	5	6	7	8	9	10
Building Contacts (Prospecting)	ML			●							
Needs Assessment (Qualifying)	L		●								
Style and Presentation (Pitching)	ML			●							
Negotiation (Closing)	ML			●							
Follow-up (Supporting)	ML			●							

Overall Sales Potential	Level	1	2	3	4	5	6	7	8	9	10
POTENTIAL SCORE	ML			●							

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

- No potential strengths could be derived from Sam's profile.

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.
- 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 an interest in understanding his client's needs when qualifying leads.
- He is less likely than most to link his clients' needs to relevant products and services.
- Sam is as likely as most to rely on objective criteria when attempting to qualify his leads. However, he may not be inclined to investigate the potential for each lead to convert into a sale.
- 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.
- Sam may not be as adept as most at persuading and influencing others.
- He is less likely than most to be concerned to adapt his selling style to fit the sales situation he finds himself in. Furthermore, he may not be sufficiently careful as to avoid saying things others might find offensive or consider to be odd or out of place.
- While capable of being as assertive as most sales people, Sam may adopt a slightly passive and accommodating closing style. While this style is likely to put many buyers at ease, it may not be sufficiently effective in closing sales.
- He is more likely than most to become impatient when dealing with customer objections and 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 quickly give up on difficult sales.
- He is less likely than most to show much interest in providing after-sales support and may not check customer satisfaction with the products or services provided.
- Sam may be disinclined to complete sales related paperwork and he is less likely than most to track the progress of sales.
- He may become annoyed when things go wrong and is more likely than most to doubt his ability to overcome challenges. Consequently, he may not strive to persevere in such situations.

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.

ML 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.

M 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 approach others and initiate contact in order to build a network of sales contacts and leads. In addition to this, he is not at all expected to be disheartened by rejection, which should make him more suited than most to selling to cold prospects.

Development Recommendations

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

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 have that great 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.

L DEVELOPMENT GUIDE: NEEDS ASSESSMENT (QUALIFYING)

L 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 very distant and detached from others. As a result, he is not likely to show an 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.

L B. Seeks to find value - The ability to create value by linking clients' needs to relevant products and services.

Profile Description
- Having a profile which indicates that he may not be as driven as most by the material value of things, Sam is unlikely to be concerned with adding value and, consequently, is less likely than most to link his clients' needs to relevant 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.

ML C. Qualifies opportunities - The ability to categorise leads according to practical sales outcomes.

Profile Description
- Sam's results suggest that he is likely to be as practical and down-to-earth as most people. As a result, he is as likely as most to rely on objective criteria when attempting to qualify his leads. Having said this, his profile also indicates that he has a rather credulous and accepting nature, whereby he is unlikely to adopt a shrewd or Machiavellian approach to qualifying his leads. Consequently, he may not be inclined to investigate the potential for each lead to convert into a sale.

Development Recommendations
- Train Sam on categorising his leads according to practical sales outcomes such as impact, urgency, willingness to act and ability to act. The training should focus on asking calculating questions such as "are they ready and able to make a decision?" or "is this lead worth my time and effort?". By utilising this approach to qualifying leads, Sam can focus his resources on the leads with most potential.

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.

ML 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 unlikely to enjoy convincing people of his point of view despite being as outgoing as most. In addition to this, he is likely to need to believe in the products or services he is offering in order to sell them effectively. As a result, he may not be as adept as most at persuading and influencing others.

Development Recommendations
- Work with Sam to develop his influencing skills. Select training or development interventions that focus on developing specific persuasion techniques such as getting buyers emotionally involved through the use of stories and painting word pictures. Such techniques can be helpful when logical arguments fail with prospective buyers. Product training can also help Sam recognise the benefits and advantages of the products and services he is required to sell and ultimately build his confidence in offering those products and services.

L C. Adaptive and conforming - The ability to adapt his selling style to closely fit buyer expectations.

Profile Description
- His profile indicates that he is less adaptable than most and that he may not be as sensitive as most to the nuances of social settings or as motivated as most to conform to others' social expectations of him. As a result, Sam is less likely than most to be concerned to adapt his selling style to fit the sales situation he finds himself in. Furthermore, he may not be as diplomatic and tactful as most, and may not be sufficiently careful as to avoid saying things 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 as well as gain the skills required to be able to adjust his responses accordingly.

ML **DEVELOPMENT GUIDE: NEGOTIATION (CLOSING)**

ML **A. Assertive** - The ability to move sales situations forward without being aggressive or coercive.

Profile Description

- While capable of being as assertive as most sales people, Sam may adopt a slightly passive and accommodating closing style. Consequently, he is likely to provide clients with assistance without pressuring them into making a decision. While this style is likely to put many buyers at ease, it may not be sufficiently effective in closing sales.

Development Recommendations

- Professional sales people know how to guide the sales pitch towards closure without being overly forceful or aggressive. While Sam is likely to adopt a relaxed style and be careful not to drive the customer away, he may not be adept at moving sales forward. Help Sam improve his ability to close sales with training that focuses on reading and taking advantage of sales/buying cues. In addition to this, work with him to overcome any fears or issues which keep him from taking charge of situations.

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 fairly tense-driven. As a consequence, he is more likely than most to become impatient when dealing with customer objections. In addition to this, his results indicate that he may not be as tactful and diplomatic as some and may not always deal with conflict in a constructive manner.

Development Recommendations

- Support Sam to respond with composure in high pressure conflict situations. There are many skills and techniques that can help in conflict situations and help deal with conflict. Such skills and techniques are often taught as part of 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 less resilient and achievement oriented than most. As a result, he may not be motivated to diligently chase after sales and may be more prone than most to quickly 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.

ML	**DEVELOPMENT GUIDE: FOLLOW-UP (SUPPORTING)**

ML	**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 much interest in providing after-sales support to customers and may not check 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.

ML	**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 be very spontaneous and may not believe it is important to follow strict processes and procedures. As a consequence, he may be disinclined to complete sales related paperwork and he is less likely than most to track the progress of sales.

Development Recommendations
- Sales people are unlikely to comply with sales procedures if they feel the procedures clash with their sales objectives and targets. Establish that procedures do not hinder sales objectives before investing in any training or development interventions. Finally, while training helps to generate awareness and buy-in, re-enforcement is often needed to increase the odds that the procedures will be regularly followed.

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

Profile Description
- His profile indicates that he is likely to be fairly tense-driven. As a consequence, he may become annoyed when things go wrong. In addition to this, his results also indicate that he is more likely than most to doubt his ability to overcome challenges and may not strive to persevere in such situations.

Development Recommendations
- Work with Sam to identify and deal with the symptoms and causes of stress in the workplace and help him build the confidence he needs to effectively deal with sales challenges. Furthermore, he is likely to benefit from stress management courses.

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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?

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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 Henry	
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**	☑	☐
	Outgoing and engages others	☐	☐
	Builds close personal relationships	☑	☐
Qualifying	**Seeks to understand needs**	☑	☐
	Seeks to find value	☑	☐
	Qualifies opportunities	☑	☐
Pitching	**Social presence**	☑	☐
	Persuasive	☑	☐
	Adaptive and conforming	☑	☐
Closing	**Assertive**	☑	☐
	Conflict handling	☑	☐
	Diligent and persevering	☑	☐
Supporting	**Service and support**	☑	☐
	Process oriented	☑	☐
	Stress management	☑	☐

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?

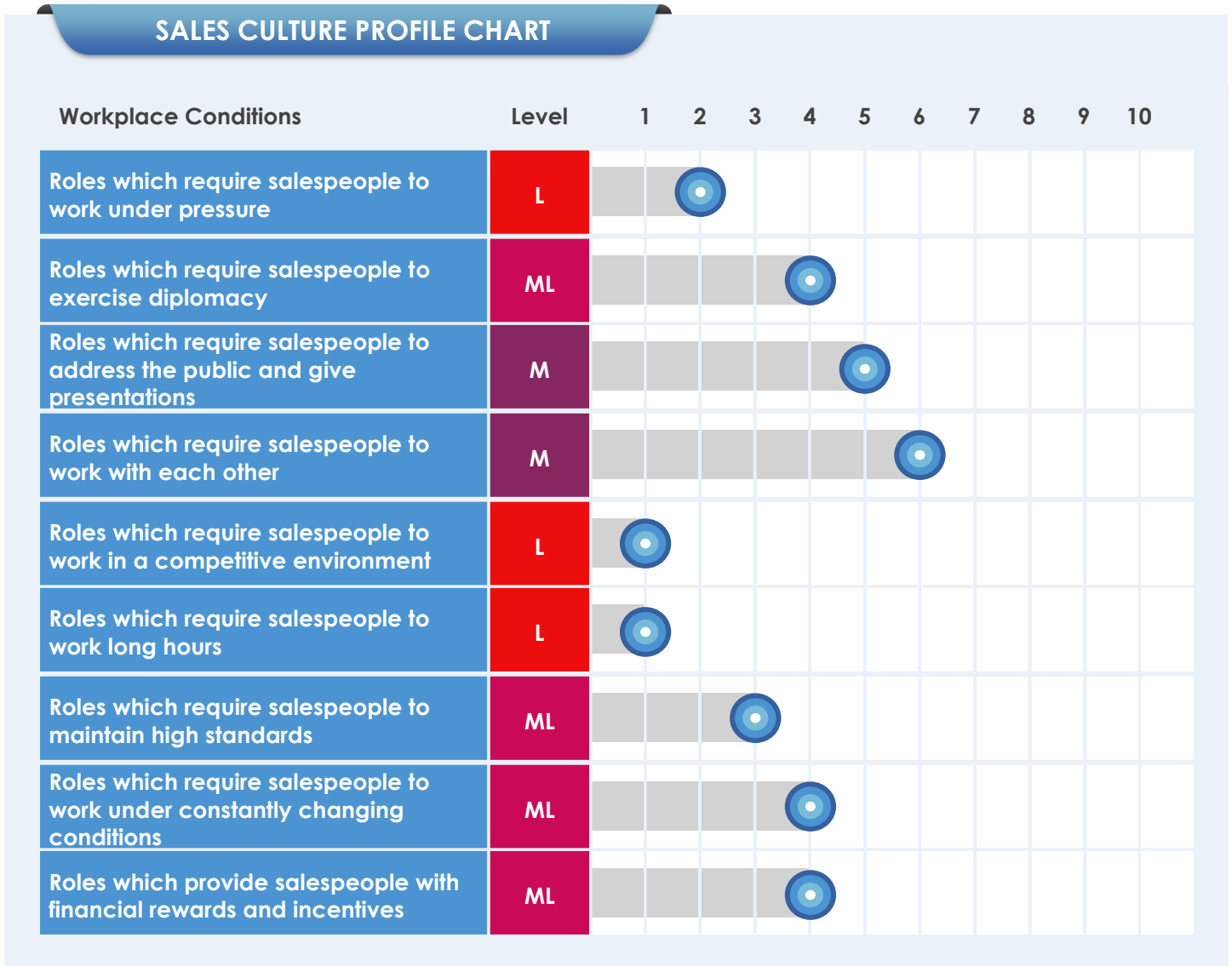## **Who** do you need support from in order to achieve your development objectives?

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

Workplace Conditions	Level	1	2	3	4	5	6	7	8	9	10
Roles which require salespeople to work under pressure	L		2								
Roles which require salespeople to exercise diplomacy	ML				4						
Roles which require salespeople to address the public and give presentations	M					5					
Roles which require salespeople to work with each other	M						6				
Roles which require salespeople to work in a competitive environment	L	1									
Roles which require salespeople to work long hours	L	1									
Roles which require salespeople to maintain high standards	ML			3							
Roles which require salespeople to work under constantly changing conditions	ML				4						
Roles which provide salespeople with financial rewards and incentives	ML				4						

SALES CULTURE PROFILE DESCRIPTIONS

L Roles which require salespeople to work under pressure

Sam's results suggest that he is likely to function less well than most in a pressured environment, where tight deadlines have to be met and demanding targets are routinely set. He is however, unlikely to enjoy working in setting which present him with challenges to overcome and problems to resolve and is unlikely to deal with these in a very positive and optimistic manner.

ML Roles which require salespeople to exercise diplomacy

He likely to be slightly less well suited than most to settings which demand degree of 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 more comfortable and at ease than most in work settings which require him to work with others and where there is a relatively high level of trust and support between colleagues.

L Roles which require salespeople to work in a competitive environment

He is unlikely to be happy working in competitive environments.

L Roles which require salespeople to work long hours

Sam's profile on the assessment suggests that his work ethic is likely to be significantly weaker than that of most other people. As a result, he is unlikely to fit into working environments that have a long-hours culture. Moreover, he is likely to prefer settings where there is not an excessive amount of work to do and where he is not kept too 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.

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

While Sam is quite open to change and is likely to prefer to work in environments where he is free to initiate change, he may have trouble maintaining his levels of energy and drive in rapidly changing environments.

ML Roles which provide salespeople with financial rewards and incentives

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