

# Report designed for Sally Sample

## Sales CheckPoint Performance Feedback System™ Management Comparison Report

Report Prepared: January 2, 2013

Current Survey Completed: December 21, 2012 This report includes responses from: Salesperson and Sales Manager

Sales Manager - Leader, Lester

Previous Survey Completed: December 20, 2011 This report includes responses from: Salesperson and Sales Manager

Previous Sales Manager - Leader, Lester

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## The Sales CheckPoint

The purpose of the Sales CheckPoint is to identify sales behaviors as viewed by you and your Salesperson, Sally Sample. There are 79 sales behaviors presented as survey items. These 79 items are grouped into 19 Skill Sets which further group into 7 Universal Sales Competencies. Both you and Sally Sample provided ratings of the sales behaviors on each of the items.

The Skill Sets are grouped into 7 Universal Sales Competencies. When a Salesperson frequently displays certain behaviors which are a part of these Sales Competencies, they are typically identified as effective and successful in sales.

The 7 Universal Sales Competencies and their 19 Skill Sets are listed below.

#### **1. Entrepreneurial Approach**

- Reflects entrepreneurial attitude
- Time optimization
- Sets effective goals

#### 2. Understands the Prospect

- Recognizes buyer behavior
- Understands the purchasing process
- 3. Develops Appropriate Solutions
  - Uses feature and benefit solutions
  - Knowledge of products

#### 4. Prospects Proactively

- Identifies prospects
- Gets appointments

#### **5. Manages Selling Process**

- Understands client-centric selling
- Establishes rapport
- Identifies prospect's needs
- Counsels prospect

#### 6. Closes the Sale

- Explores prospect's options
- Presents ideal solution
- Overcomes objections
- Closes effectively

#### 7. Manages Sales Relationships

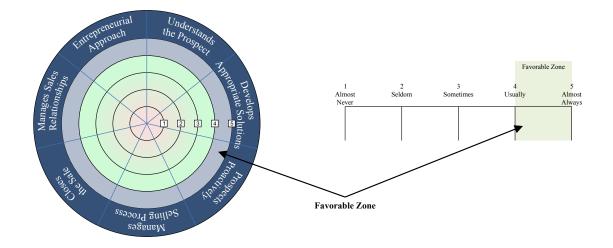
- Secures the relationship
- Develops the relationship



In the 79 Sales CheckPoint survey items the raters chose one of six possible choices. Based on their observations they indicated the percentage of time they felt the Salesperson displayed each behavior. The sixth choice was "No Opportunity," which was selected when the rater had no opportunity to observe the listed behavior and thus could not provide a meaningful response. These six possible responses were:

Response	Description	Percentage of Time
1	Almost Never	0 - 10%
2	Seldom	11 - 39%
3	Sometimes	40 - 60%
4	Usually	61 - 89%
5	Almost Always	90 - 100%
Ν	No opportunity to o	observe this behavior

**Favorable Zone:** The Favorable Zone represents a range of scores (4.0 to 5.0) where a group of experienced Sales Managers and sales trainers expect an effective Salesperson to be rated. It simply suggests that each Skill Set is important to success and that all Salespeople should remain focused on attaining that level of behavior.





### **Introduction to the Management Comparison Report**

This report summarizes the results of the Sales CheckPoint surveys that you and Sally Sample recently completed. The scores for Sally Sample are presented in graphs and numeric scales on the pages that follow.

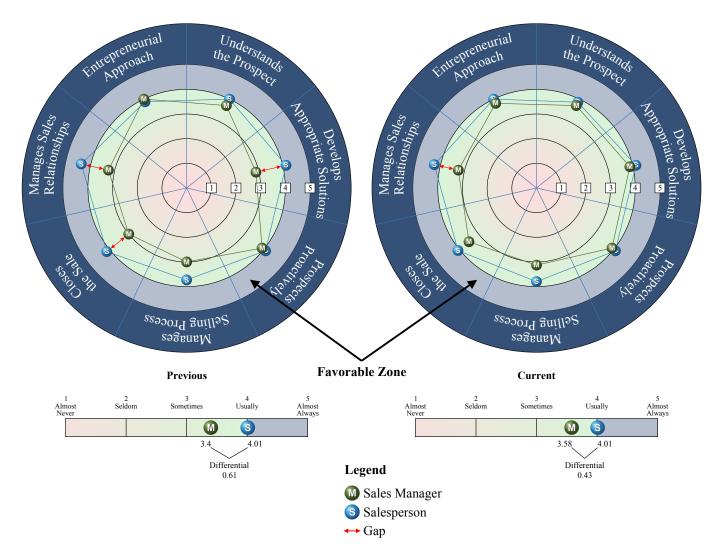
Feedback is reported in the following sections:

- <u>Executive Competency Overview</u>: Results for the 7 Universal Sales Competencies compare the average scores for both you and Sally Sample and show whether scores fall within or below the Favorable Zone. Also shown are the Total Sales CheckPoint Scores, including the score differential between both of you.
- <u>Skill Set Summary</u>: Overview of the 19 Skill Sets as rated by you and Sally Sample. The average ratings are displayed ranked from highest to lowest of the most recent scores for both of you. Your ratings are shown in the first group while the ratings from Sally Sample are in the second group. This provides you an overview of the relative strengths or challenges of Sally Sample in these Skill Sets.
- <u>Critical Skills Alignment Summary</u>: Overview of the Skill Sets identified as critical by you and Sally Sample.
- <u>Executive Summary</u>: Results for the 7 Universal Sales Competencies, comparing the average scores of both you and Sally Sample and pointing out score averages that vary by 1 point or more.
- <u>Skill Set Analysis</u>: Results for the 19 Skill Sets, comparing the average scores of both you and Sally Sample, and pointing out score averages that vary by 1.5 points or more, as well as analyzing Critical Skill Sets to establish Talents, Areas of Focus, and areas where a significant gap exists between the scores of you both. (You both chose 6 Critical Skill Sets out of 19. These were considered critically important to the effectiveness of Sally Sample in selling.)
- <u>Survey Summary of the 79 items</u>: Results for all 79 survey items, displaying the scores of you and Sally Sample while highlighting the items that fall in a Critical Skill Set.
- **Development Summary Overview**: Describes the strengths and development needs for Sally Sample in the 19 Skill sets.

As you review this material, keep in mind that most people exhibit a range of abilities. No one does everything equally well. Approached as a learning tool, this feedback can be a valuable first step toward increasing the sales effectiveness of Sally Sample. Of particular interest in many sections will be the ability to compare the results from the two different Sales CheckPoint surveys. Where a difference between the two average ratings exceeds 1 point there will be an indication with an icon (1).

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## **Executive Competency Overview**



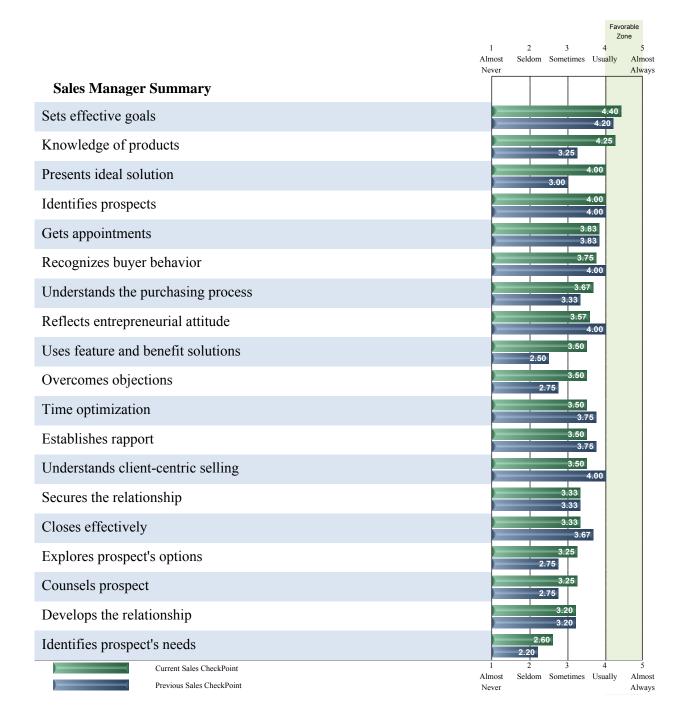
This is an overview of your average ratings compared to the average ratings of Sally Sample for all 7 Competencies. Note particularly where there is a gap of 1 point or greater. This would indicate a significant difference between perceptions and suggests a need for discussions between you and Sally Sample.

Total Sales CheckPoint Scores reported on the smaller horizontal graph present the average score for all 7 Competencies for you and Sally Sample. Again, a gap of 1 or more is a call for discussion and strongly suggests the need for immediate attention.



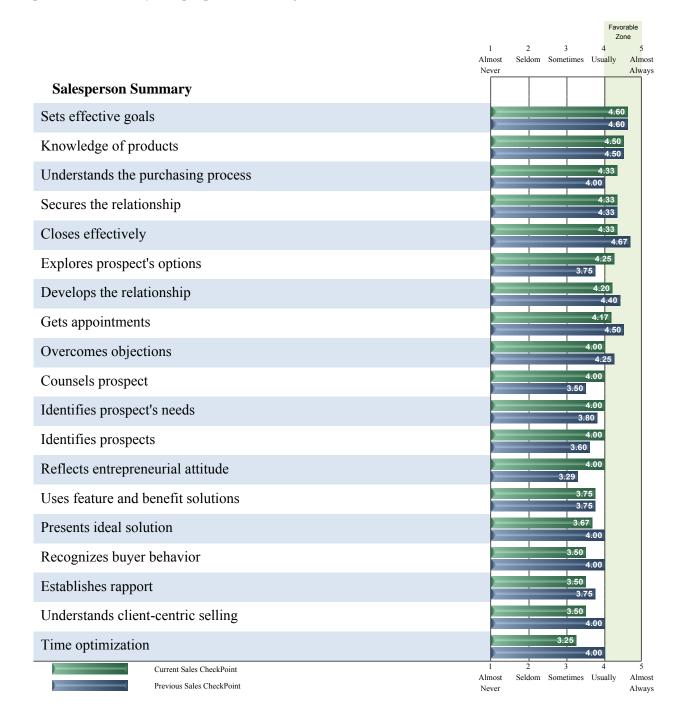
## **Skill Set Summary**

The first graph below shows the average ratings for each Skill Set given by you. The average ratings are displayed in ranked order from highest to lowest based on the most recent survey providing you with your perception of the relative strengths of Sally Sample in these Skill Sets.





This graph shows the average ratings for each Skill Set given by Sally Sample. The average ratings are displayed in ranked order from highest to lowest based on the most recent survey. This will give you a picture of how Sally Sample perceives strengths in these Skill Sets.





### **Critical Skills Alignment Summary**

You and Sally Sample identified the 6 Skill Sets that you each thought were most critical for success in selling. These Skill Sets for both Sales CheckPoints are displayed below. Consider that the possible number of Skill Sets selected by you and Sally Sample can range from 6 to 12. If you both select the same 6 Skill Sets you will have 100% alignment. When you did not agree on any of the Skill Sets as most critical, there is 0% alignment. As the alignment percentage decreases, it becomes even more important for you and Sally Sample to discuss and clarify the most important aspects of the selling process. Unless you have both identified the same behaviors as critical, there will be a real potential for disagreement on where Sally Sample should focus. Also, look for any variance in which Critical Skill Sets were selected for each Sales CheckPoint survey. This could reflect a change in focus between the dates of the two surveys.

Pre	evious	Curr	ent
	ritical Skills Alignment	Critical Skills Alignme	
М	Lester Leader - 67%	Lester Leader - 83%	Μ
S	Time optimization: Manages time wisely and balances time selling with time servicin	g clients.	
S	<b>Recognizes buyer behavior:</b> Identifies reasons prospects buy products or services a approach.	nd uses this knowledge to enhance sales	S
М	<b>Understands the purchasing process:</b> Exhibits knowledge of the roles, goals, an and develops relationships with them.	d processes of purchasing professionals	S M
Μ	<b>Uses feature and benefit solutions:</b> Develops and offers solutions by communication identifying how those characteristics will satisfy the prospect's needs.	ting product characteristics and	
S M	<b>Knowledge of products:</b> Displays expert knowledge of products and services and us effortlessly address a prospect's needs.	es this knowledge to quickly and	S M
S M	<b>Identifies prospects:</b> Recognizes the characteristics of ideal prospects and focuses tim highest probability of becoming good clients.	e and activities on those with the	
	Understands client-centric selling: Recognizes prospect's needs and strives to mapossible.	ke the buying process as easy as	S M
	<b>Identifies prospect's needs:</b> Uncovers the real needs of prospects to increase the lik client satisfaction.	elihood of making a sale and increasing	S M
S M	<b>Presents ideal solution:</b> Demonstrates an understanding of prospect's needs and desiviable options for a solution.	res and uses product expertise to provide	S M
	<b>Overcomes objections:</b> Recognizes prospect's objections and provides clear and cond satisfaction level.	sise information to raise prospect's	Μ
S	Secures the relationship: Stays in front of client and prospect's needs and establishe do more business with them.	s opportunities to generate contacts and	

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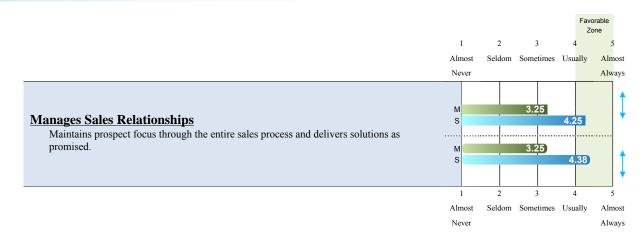
## **Executive Summary**

The average rating for you and Sally Sample on the 7 Sales Competencies is presented in this section. The numbers shown are the average ratings. Note the differences between ratings, especially if there is a gap indicated (a difference of 1 point or more) for each survey. Additionally, note that when the current survey average ratings for one of you differs by .5 or more, there is a  $\bigcirc$  or  $\bigcirc$  to indicate the direction of that change.

Indicates a .5 or greater increase in average rating since the previous rating period.	Current	Sales Manager Salesperson	
Indicates a .5 or greater decrease in average rating since the previous rating period.	Description	Sales Manager	🖡 Gap
Indicates a 1 point or greater difference in average ratings since the previous rating period.	Previous	Salesperson	•
			Favorable Zone
		1 2 3 4 Almost Seldom Sometimes Usu	ally Almost
		Never	Always
Entrepreneurial Approach		M 3.81 S 4.00	
Willingness to take the initiative to start projects or vent	ures and to accept the risk		
associated with them.		M 4.00 S 3.88	
		M 3.71	
Understands the Prospect Recognizes the needs and desires of prospects and keeps	a focus on the prospect and tho	s 3.86	
needs.	1 1	м 3.71	
		s 4.00 ➡ M 3.88	
		s 4.13	
Develops Appropriate Solutions Aligns products or services with prospect's needs and off	fers solutions to satisfy those ne	-ds M 2.88	
ringhs products of services with prospect's needs and on	ters solutions to suisify those net	s 4.13	
Prospects Proactively		M 3.91 S 4.09	3
Actively seeks out potential customers and efficiently ide possibilities for sales.	entifies those that represent real		•••••
possionnes for sales.		M 3.91 S 4.09	
Manages Selling Process		M 3.13 S 3.80	
Focuses on client centered solution selling as a process to	o meet prospect's needs while	3 3.00	
impacting the bottom line.		M 3.00 S 3.73	
		⊕ M 3.50	
Closes the Sale		s 4.07	
Controls the sales process and expertly guides the prospe	ect to the logical final step by	м 3.00	
obtaining a positive decision and sales agreement.		s 4.14	P  ]
			5
		Almost Seldom Sometimes Usu	
		Never	Always



## Management Comparison Report For Sally Sample





## **Skill Set Analysis**

Any differences between the Critical Skill Sets selected by you and Sally Sample are of particular interest. Such discrepancies suggest important differences between both of your expectations. They should be the initial subject of discussion.

The definitions for each Skill Set are provided along with the average score for you and Sally Sample. Any difference in ratings for these Skill Sets requires careful consideration and calls for an immediate discussion and possibly additional coaching. You may see a vertical arrow, which indicates the presence of a gap of 1.5 or more points between both your scores.

\$	Any difference between respondents where averages vary Talent by 1.5 points or more.	A Critical Skill Set, according to Salesperson or Sales Manager, and both Salesperson and Sales Manager score averages are equal to or higher than 4.0	Current	t Sal	es Manager Salesperson
$\leftrightarrow$	A Critical Skill Set, according to Salesperson or Sales Manager, and both Salesperson and Sales Manager score averages differ by 1.5 points or more.	A Critical Skill Set, according to Salesperson or Sales Manager, and both Salesperson and Sales Manager score averages below 4.0	Previou	s Sal	es Manager Salesperson
	<b>A</b>	Indicates a 1 point or greater difference in average ratings since the previous rating period.		.5 or greater ting since the	increase in previous rating
M 3	Ratings for Salesperson and SalesManagerS	Selected by Salesperson, Sales Manager, or Salesperson & Sales Manager as a Critical Skill Set.		.5 or greater ting since the	decrease in previous rating
	Performance Analysis	Skill Set		Compariso	on
	Favorable Zone				Favorable Zone
1			1	2 3	4 5
Almost Never	Seldom Sometimes Usually Almost			eldom Sometimes	Usually Almost Always
INEVEL	Always		Never		Aiways

itever		Thways		140	101
	M		Entrepreneurial Approach	м	
	3 (	D	<b>Reflects entrepreneurial attitude:</b> Creates a positive climate for producing results. Accepts responsibility and practices high standards both professionally and personally. Works diligently to meet the needs of prospects and clients.	⊕ s M s	
	SM		Time optimization: Manages time wisely and	M • s	
	M	•	balances time selling with time servicing clients.	M S	
1 2 Almost Seldo	3 4 om Sometimes Usu			l Aln	l nost
Never		Always		Ne	ver



. . . . . . . . .

2

3.29

3.50 3.25

3

Seldom Sometimes Usually

3.75 4.00

4

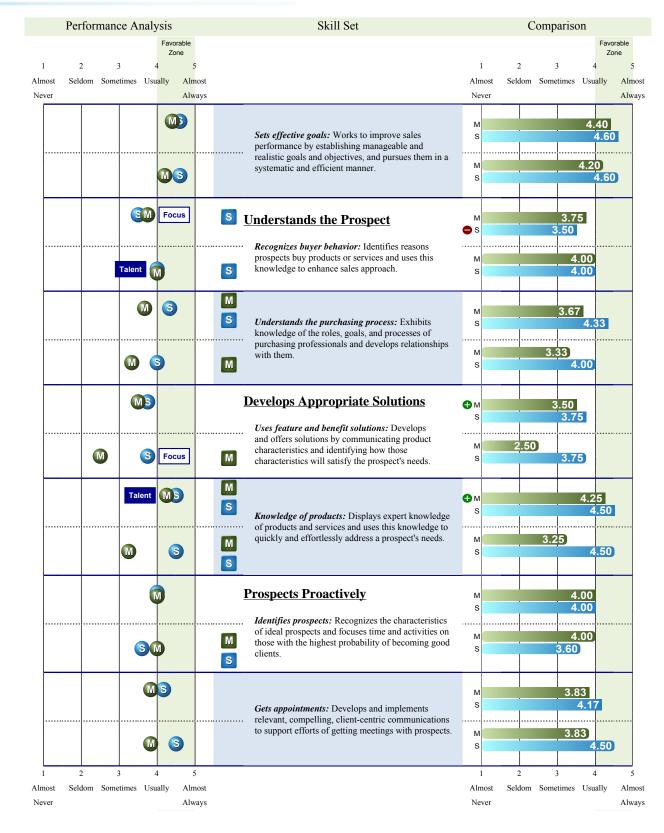
5

Almost

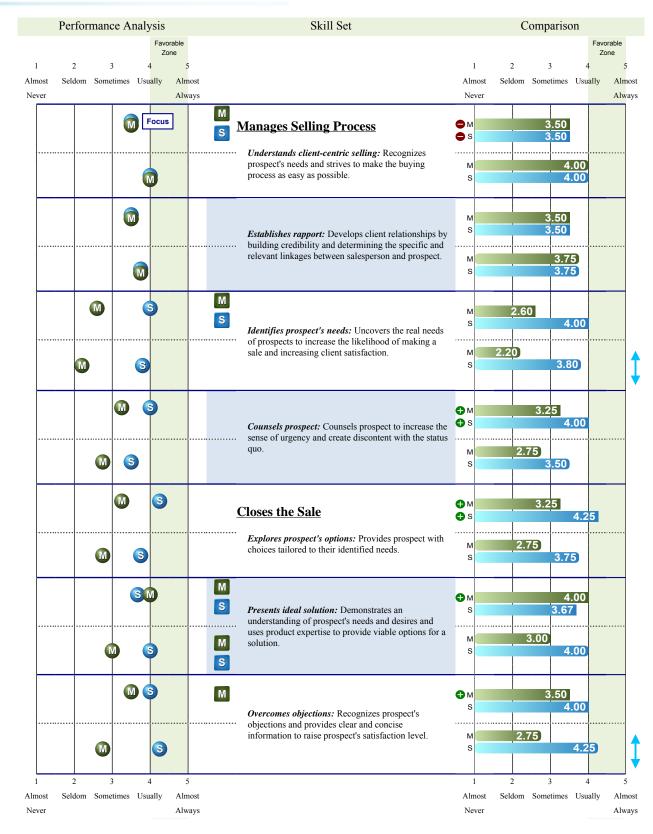
Always

4.00

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Performance A	Analysis	Skill Set		(	Compariso	n	
	Favorable Zone						orable one
1 2 3	4 5		1	2	3	4	5
most Seldom Sometime	5		Almost	Seldom	Sometimes	Usually	Almo
ever	Alwa	ys	Never				Alwa
	3	<i>Closes effectively:</i> Guides prospect through the entire sales process and uses ethical methods to help prospect decide to buy.	M		3.33	4.33	
			s			4.6	2
	3	Manages Sales Relationships	M S		3.33	4.33	
	3	Secures the relationship: Stays in front of client and prospect's needs and establishes opportunities to generate contacts and do more business with them.	) M		3.33	4.33	
	3	<b>Develops the relationship:</b> Creates and maintains client loyalty by building a reputation by following	M S		3.20	4.20	
M	3	up on the sale and effectively servicing client after the sale.	M S		3.20	4.40	
1 2 3	4 5		1	2	3	4	5
most Seldom Sometime ever	es Usually Alm Alwa		Almost Never	Seldom	Sometimes	Usually	Almo Alwa



## 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 gaps identified require immediate attention by both of you.

Current Sales CheckPoint	۵ 🚯	М	S		Sales Ma Salesp	anager berson
Previous Sales CheckPoint	۵ 🚯	М	S		Sales Ma Salesp	anager berson
	Sales Manager and/ Salesperson did not rate	e item Critical Skill Se	Items that fall in a t, as designated by /or Sales Manager		Color Key	
			1	1 2	5 Far	vorable Zone 5
			Aln Ne	nost Seldom	Sometimes Usually	Almo Alwa
Entrepreneuria	Approach					
R	eflects entrepreneurial attiti	ıde				
					4.00 4.00	
••••••	1. Displays and maintains a pos	itive attitude		······	3.00	5.00
_				2.00		
	2. Accepts risk when necessary			1.00		
			•	2.00		5.00
	3. Puts client's needs first					5.00 5.00
					4.00 3.00	
	4. Practices high ethical standar	de			<u>3.00</u> 4.00	
	4. Tractices high ethical standar	us				5.00 5.00
					4.00	5.00
	5. Works on improving skills		••••••		4.00	5.00
					3.00	
	6. Communicates in positive ter	rms			4.00 3.00	
					3.00	
	7. Able to handle rejection				4.00	5.00
				2.00	3.00	
			l Aln Ne		3 4 Sometimes Usually	5 Almo Alwa



## Management Comparison Report For Sally Sample

		1 2 Almost Seldo Never	3 m Sometimes	Favorable Zone 4 Usually Al: Alv
S	Fime optimization			
	8. Recognizes optimal time for prospecting	 1.00	3.00 4 3.00	.00
	9. Recognizes optimal time for servicing clients	 2.00	3.00	.00
	10. Selects appropriate opportunities		3.00 4 3.00	5.00
	11. Evaluates time management on a regular basis		3.00	5.0 5.0 5.0
<u>S</u>	Sets effective goals			
	12. Develops goals that support overall objectives		4	.00 5.0 5.0
	13. Plans for how to achieve goals		4	.00 .00 .00
	14. Monitors progress toward goal achievement		4	5.0 5.0 5.0
	15. Evaluates goal attainment process regularly		4	.00 .00 .00 5.0
	16. Holds self accountable for goal achievement		3.00	5.0 5.0 5.0
		1 2 Almost Seldo Never	3 m Sometimes	4 Usually Al Al



## Management Comparison Report For Sally Sample

Indonstands th	a <b>Pr</b> aspat	Alı	1 2 most Seldor	m Sometimes	Usually Al
Inderstands th	Recognizes buyer behavior				
	17. Able to identify personal and business agenda of prospect			3.00 3.00	.00
	18. Able to recognize prospect's problem or need			3.00 3.00 4. 3.00	.00
	19. Recognizes how change affects need and opportunity			4. 4.	.00 .00 .00
	20. Guides prospect through the buyer decision making process				.00 .00 5.0 5.0
<u>s</u> M M	Understands the purchasing process				
	21. Recognizes the role of the purchasing department in an organization			•••••	.00 5.0
	22. Responds to purchasing professionals' needs			4. 3.00	.00 .00
	23. Identifies the real decision makers in an organization			3.00 4. 3.00	.00



		1 2	3	Favorable Zone 4
)evelons Ann	ropriate Solutions	most Seldor	n Sometimes	Usually Ali
	Uses feature and benefit solutions			
	24. Recognizes what constitutes a solution			.00 .00
	25. Determines benefit by identifying features important to prospect	 2.00	3.00 4 3.00	.00
	26. Focuses on prospect's needs rather than wants		3.00 3.00	.00
	27. Identifies and creates solutions for prospects	 2.00	3.00 4	.00 5.0
S M S M	Knowledge of products			
	28. Develops expert knowledge of products		4	.00 5.0 5.0 5.0
	29. Recognizes problems that may be solved with products	 2.00	4	.00 .00
	30. Recognizes and understands the competition		4	.00 .00 .00 5.0
	31. Able to provide product knowledge to colleagues	 2.00	4	5.0 5.0
		1 2 most Seldor ever	n Sometimes	4 Usually A A



rospects Proa	<u>actively</u>	Ne		A
SM	Identifies prospects			
	32. Able to define ideal prospects		3.00 3.00 4.00	D
	33. Researches prospect's situation and potential solution fit		3.00	5.( 0 5.(
	34. Able to identify the correct person in an organization as a prospect		4.00 4.00 3.00	0
	35. Uses a targeted prospect list		4.0( 4.0) 4.00	0 5.(
	36. Generates lead through referrals, networking, associations, and centers of influence		4.00	5.(
	Gets appointments			
	<ol> <li>Able to provide relevant, compelling communications to prospects</li> </ol>		4.00 4.00 4.00 3.00	0
	38. Able to create a sense of urgency with a prospect		3.00 4.00 3.00	0
	39. Provides a clear call to action for a prospect		4.00	5.( 5.) 0 5.(
	40. Recognizes own ability to provide help to prospect		4.00	0 5.(
	41. Refines and practices value propositions for each prospect		4.00 4.00 3.00	
	42. Able to use all forms of communication to apply value proposition		3.00 4.00	



anages Sel	ling Process	N	ever	
SM	Understands client-centric selling			
	43. Treats sales transactions as relationships			3.00 4.00 3.00
	44. Synchronizes selling with prospect's buying process			4.00 3.00 4.00
	··· Establishes rapport			
	45. Makes a good first impression			4.00 3.00 4.00 3.00
	··· 46. Builds credibility			3.00 3.00 3.00 4.00
	47. Identifies specific linkages with prospect			4.00 4.00 4.00
	48. Transitions efficiently to prospect's needs			3.00 4.00 3.00 4.00
SM	Identifies prospect's needs			
	49. Recognizes the real needs		2.00 2.00	
	50. Establishes self as creditable resource		2.00	3.00 4.00
	51. Uses active listening well			3.00 4.00 3.00 4.00
	52. Displays appropriate empathy		2.00	3.00
	53. Uses questions effectively			3.00 3.00 3.00

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		Al		3 Iom Sometimes	
	Counsels prospect		ever		
	54. Demonstrates understanding of prospect's needs			3.00	4.00 4.00 4.00
	55. Educates prospect on their primary needs			3.00 3.00 3.00	4.00
	56. Raises prospect's urgency		2.00	3.00	4.00
	57. Presents product as solution		2.00	3.00 3.00	4.00
Closes the Sale					
	Explores prospect's options	_			
	<ol> <li>58. Prepares prospect for different solution to their need</li> </ol>			3.00 3.00 3.00	4.00
	59. Involves prospect in exploration process		2.00	3.00 3.00	4.00
	60. Acts appropriately as an expert			3.00	4.00 4.00
	61. Presents correct solutions			3.00 3.00	4.00
S M S M	Presents ideal solution				
	62. Involves prospect in evaluation process			3.00	4.00 4.00 4.00
	63. Offers well-thought-out solutions		2.00	3.00 3.00	5.
	64. Guides prospect's selection of solution			3.00	4.00 4.00
		Al	1 2 most Seld		4 s Usually



			nost Sele ever	dom Some	etimes Usu	ally A
М	Overcomes objections	110				
	• 65. Identifies basis for objection		2.00	3.00	4.00	5.
	• 66. Acknowledges legitimacy of the question				4.00 4.00 4.00 4.00	
	• 67. Clarifies the facts for the prospect		2.00	 	4.00 4.00 4.00	
	• 68. Responds with concise information			3.00 3.00 3.00		5.
	· Closes effectively					
	69. Identifies each step of sales process for prospect			3.00	4.00 4.00 4.00	
	70. Ensures all prospect's concerns have been satisfied				4.00	5. 5. 5.
	• 71. Uses a variety of closing techniques		2.00	3.00	4.00	5.
lanages Sale	s Relationships					
SM	Secures the relationship					
	• 72. Follows trends affecting prospects and clients			     	4.00	5. 5. 5.
	• 73. Builds reputation with the prospects and clients		2.00	3.00	4.00	5.
	• 74. Becomes an advocate for the clients		2.00	3.00	4.00 4.00	



	Favorable Zone
	1 2 3 4 5 Almost Seldom Sometimes Usually Almo Never
 Develops the relationship	
 75. Keeps clients loyal	3.00 5.00 4.00 4.00
 76. Maintains communication with clients	3.00 4.00 4.00
 77. Maintains honesty with clients	5.00 5.00 4.00 5.00
 78. Utilizes up-selling and cross-selling where appropriate	2.00 4.00 2.00 5.00
 79. Obtains referrals from clients	3.00 3.00 4.00
	l 2 3 4 5 Almost Seldom Sometimes Usually Almo Never Alway



### **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.

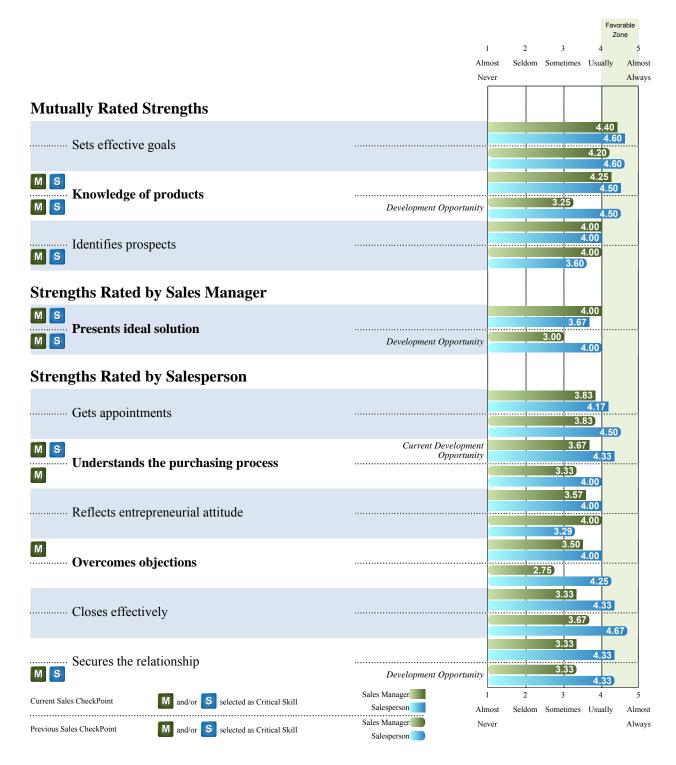
The results for each Skill Set are sorted and grouped together based on whether you and Sally Sample identified them as critical. Within each grouping, scores are sorted by average rating for each Skill Set based on the average scores you provided. Here is how the results are grouped:

- **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.

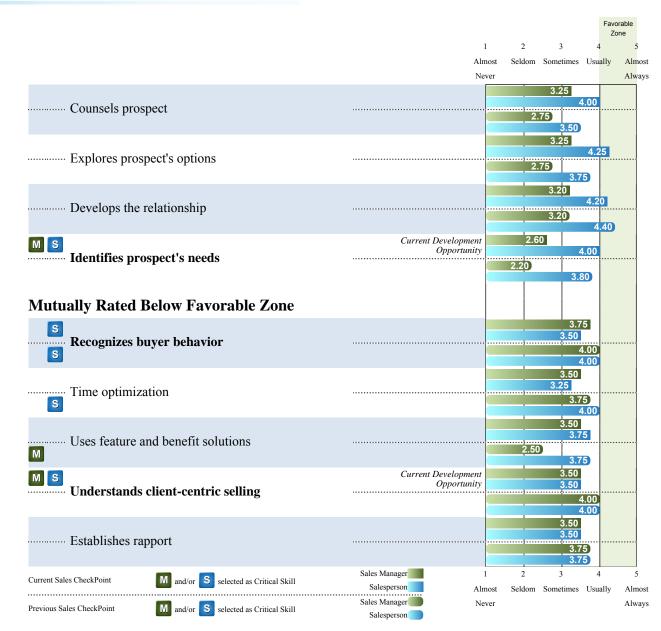


Here are the Skill Sets grouped according to how the average ratings fell in regard to the Favorable Zone. You should note the Development Opportunities that are suggested with these results; particularly where a Skill Set has been identified as critical. Of course, if a large variance between both of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





## Management Comparison Report For Sally Sample





# Management Considerations

Report Prepared: January 2, 2013

## Regarding Sally Sample

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### 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 Comparison 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.

- Understands client-centric selling Recognizes prospect's needs and strives to make the buying process as easy as possible.
- **Identifies prospect's needs** Uncovers the real needs of prospects to increase the likelihood of making a sale and increasing client satisfaction.
- Understands the purchasing process Exhibits knowledge of the roles, goals, and processes of purchasing professionals and develops relationships 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.

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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	
✓ Overcomes objections	✓ Understands the purchasing process	✓ Recognizes buyer behavior	
	✓ Knowledge of products		
	✓ Understands client-centric selling		
	✓ Identifies prospect's needs		
	✓ Presents ideal solution		

Development Summary Overview		
Development Opportunities	My Action Steps	
Understands client-centric selling	Target Completion Date:	
<ul> <li><b>1</b> → 3.50</li> <li><b>1</b> → 3.50</li> </ul>	Keep Doing:	
Focus	Stop Doing:	
	Start Doing:	



Development Summary Overview		
Development Opportunities	My Action Steps	
Identifies prospect's needs	Target Completion Date:     Keep Doing:     Stop Doing:     Start Doing:	
Understands the purchasing process	Target Completion Date:   Keep Doing:   Stop Doing:   Start Doing:	

Additional Development Opportunities		
Development Opportunities	My Action Steps	
	Target Completion Date:	
◎	Keep Doing:	
Talent     Focus     Gap       Circle one if appropriate	Stop Doing:	
	Start Doing:	

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Additional Development Opportunities		
Development Opportunities	My Action Steps	
M – S –	Target Completion Date:         Keep Doing:	
Focus     Gap       Circle one if appropriate	Stop Doing:	
	<b>S</b> tart Doing:	
	Target Completion Date:	
∭ – ⑤ –	Keep Doing:	
Talent     Focus       Gap       Circle one if appropriate	Stop Doing:	
	<b>S</b> tart Doing:	

