



Objective  
Management  
Group®

# **SALES MANAGEMENT**

## CANDIDATE ASSESSMENT

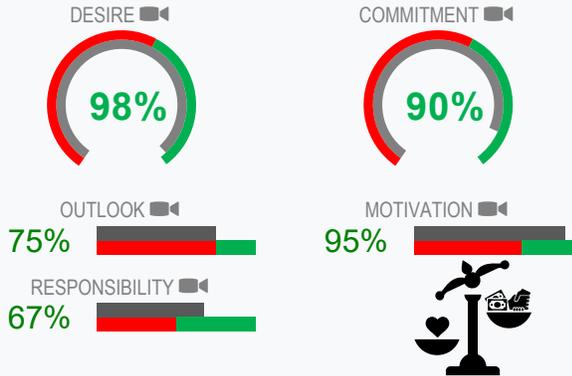
**CHARLES JONES**

APRIL 12, 2018

ABC COMPANY  
ABC MANAGER  
MODERATE DIFFICULTY

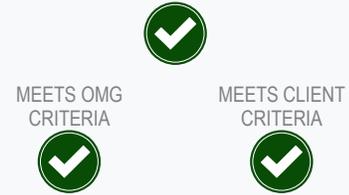
**RECOMMENDED**

### The Will to Sell and Manage Salespeople Competencies



### Recommendation

Recommended



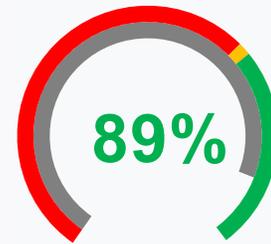
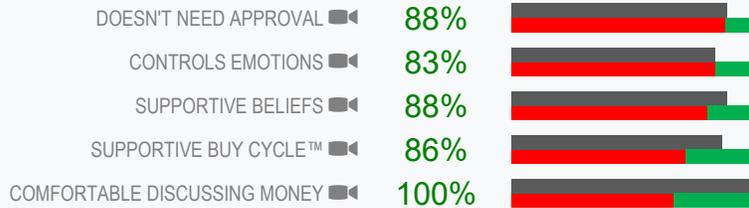
### Sales Management Quotient™



### Development



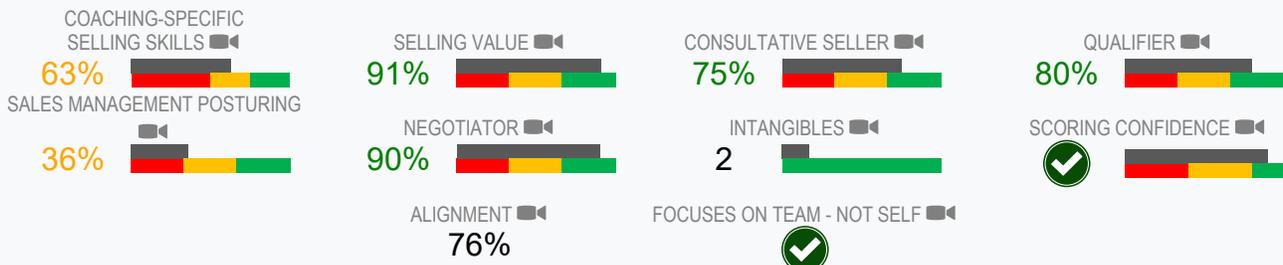
### Sales Management DNA Competencies



### Sales Management Competencies



### Other Competencies and Scores



This assessment will indicate whether Charles will effectively manage salespeople; will actually sell (if the role requires it), whether Charles is trainable, can be coached and the kind of help you'll need to provide if you move forward and hire Charles. Please understand that while this is not a personality profile, aptitude test nor psychological test, those instruments can be useful for determining cultural fit and with other positions. This assessment deals specifically with Charles's sales and sales management potential with your company. While this is a very important piece of the puzzle, it is only one piece. It does not measure intelligence, technical knowledge, self-presentation, and appearance nor does it check references and all of those issues remain quite important. It does uncover what could have been hidden from view, even in a fairly comprehensive series of interviews. Therefore, our recommendations should be interpreted accordingly. Explanations for most of the weaknesses you'll read about in this document can be found on our website. <http://OMGQLink.com/findings>

## ***DO WE RECOMMEND YOU INTERVIEW CHARLES?***

Charles is recommended for an interview because Charles meets OMG's requirements as well as all of the requirements from your role specification.

### **Requirements**

Meets OMG Criteria	✓
Will to Manage Sales	✓
Meets minimum Sales Management DNA of 68% for difficulty level	✓
Has required sales skills	✓
Has required management skills	✓
Meets Client Criteria	✓
Profit as number one strategy	✓
Maintains personal sales (required)	✓
Create new channels	✓
Finding new business	✓
Firm pricing	✓
Strong prospecting (required)	✓
Price shopper protection	✓
Rejection-proof selling manager (required)	✓
Recommendation	✓

### **Coaching-Specific Selling Skills**

In order to be Recommended, a sales management candidate must possess at least 4 of the following coaching-specific selling skills.

#### **Coaching-Specific Selling Skills**

Asks Great Questions	✗
Asks Enough Questions	✓
Effective Sales Process	✓
Uncovers Compelling Reasons to Buy	✓
Understands How Prospects Will Buy	✓
Develops Strong Relationships	✗
Avoids Purchasing at Start of Sales Process	✓
Won't Accept Put-Offs	✗

63%

## Intangibles

We were able to identify the existence of the following intangibles.

### Intangible

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

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## HOW CONFIDENT ARE WE IN OUR RECOMMENDATION?

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

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

### High Confidence



A high Confidence Score on Charles's assessment indicates that we are confident in Charles's answers.

## WHAT SHOULD YOU ASK CHARLES DURING THE INTERVIEW?

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

Inquire about past or present professional sales management training that might account for the unusually strong test results.

Inquire about past sales management successes that would support the strong test results.

Ask what the candidate thought about the test and listen for any clues that would lead you to believe that the candidate "figured it out."

Speak with immediate past employer to verify that performance was exceptional. If you learn that Charles's performance was not exceptional, there is a possibility that the test results for this candidate may not be accurate.

## HOW ALIGNED IS CHARLES WITH YOUR SALES MANAGEMENT STRATEGIES?

The following section compares what your company needs Charles to do with what Charles is most comfortable doing.

76%

- ✓ The candidate has the experience required in your strategies
- ✗ The candidate does not have the experience required in your strategies
- i The candidate has experience that was not required in your strategies

### With regard to accounts and customers:

- i Volume
- ✓ Profit

### With regard to the financial profile of a potential customer:

- ✓ Potential Volume
- i Credit Worthiness

### With regard to the details of the business:

- ✓ Follow the Plan Without Deviation
- i Pursue Unplanned Opportunities Whenever They Appear

### With regard to the Sales Manager's role I see:

- ✓ The Manager Maintains Personal Sales  
A Salesperson with Supervisory Responsibility
- i Someone who Manages and Develops Salespeople  
A Supervisory Position

### With regard to Recruiting:

- ✓ Only A Players  
The first available candidate  
The best available candidate

### With regard to providing sales training:

- ✓ Bring in outside training professionals
- i Have our people provide the training  
Realize that training doesn't work  
Hire salespeople that don't require any training

### With regard to compensation:

- ✗ All salary
- i Salary plus bonus
- i Salary plus commission
- i All commission

### With regard to developing people:

- ✓ Develop the existing people
- i Replace all of our non performers

### With regard to sales tools (e.g. CRM, pipeline management, marketing automation):

- ✓ Get everyone using it
- i Plan future installation  
Continue without these tools
- i Expand our use of tools

**With regard to our market strategy:**

- ✔ Expand it
- ❌ Defend it
- ❌ Maintain it

**With regard to Trade Shows:**

- ❌ In every appropriate show
- ❌ In targeted shows
- ❌ As little as possible

**With regard to the role of marketing:**

- ✔ Create leads
- ❌ Create visibility
- ❌ Generate sales
- ❌ Enhance company image

**With regard to reaching customers/clients:**

- ✔ Create new channels
- ❌ Develop existing channels

**With regard to company identity:**

- ❌ Price
- ❌ Quality
- ❌ Service
- ❌ Expertise

**With regard to growth:**

- ✔ Finding new business
- ❌ Growing existing accounts

**With regard to competition:**

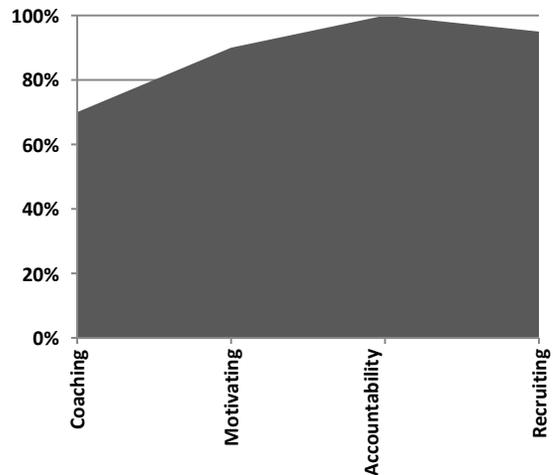
- ❌ Beat their price
- ❌ Match their price
- ✔ Hold firm on prices

**With regard to an inbound strategy:**

- ❌ Not change our current strategy
- ❌ Generate interest/leads for our salespeople
- ❌ Take all of the easy leads and online orders we can get
- ❌ Simply have a social media presence
- ❌ Ignore it for now

## WHAT ARE CHARLES'S CURRENT SALES MANAGEMENT CAPABILITIES?

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



The graph tells a story that suggests Charles has the following capabilities:

**Coaching** - Coaching has become 50% of a sales manager's role. Coaching is the key to helping your salespeople improve and generate more revenue. Charles's current sales coaching skills are very good. We will provide more details in the chapter on Coaching.

**Motivating** - The days of sales management cheerleading may be a thing of the past but the ability to motivate one or many to change a behavior, put forth more effort, push through their comfort zone or rally around a goal is more important than ever. Currently, Charles's ability to motivate salespeople in this way is fairly effective. We will provide more details in the chapter on Motivation.

**Accountability** - The ability to hold salespeople accountable to something measurable, usually some predetermined metrics, on a daily or weekly basis allows managers to review forward-looking indicators rather than lagging indicators. Currently, Charles's ability to hold salespeople accountable to these metrics is very good. We will provide more details in the chapter on Accountability.

**Recruiting** - It is becoming more important to have the right salespeople in the right roles, have A and B players instead of B and C players, and to get it right at selection time. This places sales managers and their ability to recruit effectively under a microscope. Currently, Charles's ability to effectively recruit salespeople is very good. We will provide more details in the chapter on Recruiting.

### Sales Management Competencies

We looked at four Core Competencies to determine the percentage of attributes that Charles possesses in each one:

- Coaching
- Motivating
- Accountability
- Recruiting

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

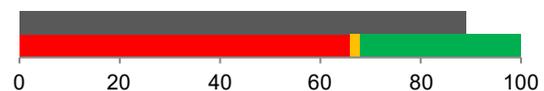
As we present our data-supported findings and continue answering these important questions, the Competencies will be a consistent part of those answers. While there is much more to sales and sales management than skills - strategies and tactics - they do represent 50% of the equation. The other 50% is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

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

### Sales Management DNA

Sales Management DNA represents Charles's power to impact sales management activities. Charles's Sales Management DNA Score, shown below, is comprised of five major strengths that have the greatest impact on sales management activities. Lower numbers represent Sales Management DNA that will impede a sales manager's performance.

89%



This score suggests that Charles's Sales Management DNA is having a positive impact on sales management effectiveness.

## Time Allocation

We asked Charles to tell us what percentage of time is spent in 10 areas of sales management. Then we compared Charles's answers to the ideal distribution of time based on current sales management best practices.

Area of Activity	Charles's Time %	Ideal Time %
Coaching Salespeople	25	50
Motivating Salespeople	20	10
Measuring Performance / Accountability	20	15
Recruiting	10	5
Crisis Management	2	5
Internal Company Issues	1	5
Planning / Managing Compensation	1	1
Organization / Reorganization	1	1
Business / Product Strategy	5	3
Direct Selling	15	5

Charles has fallen into the proverbial sales management trap where instead of managing salespeople Charles manages everything else. Ultimately, only Charles's salespeople can bring in the business while paperwork, phone, computer, desk and fire fighting contribute very little. You would need to redefine Charles's priorities so that the majority of Charles's time is spent working with and developing salespeople.

## Summary of Sales Management Capabilities

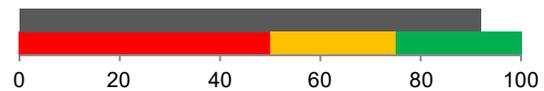
We have analyzed:

- The specific Competencies
- Sales Management DNA
- Allocation of Time

Together, these three elements are the primary sources for determining Charles's current sales management capabilities.

Charles's overall sales management capability score is

92%



Overall, Charles's sales management capability today is good. The Competencies have little in the way of gaps, and Charles's Sales DNA is not getting in the way very frequently. Appropriate sales management training and coaching will help fine-tune Charles's skills, remaining weaknesses, and improve Charles's sales management capability over time.

## HOW MOTIVATED IS CHARLES AND HOW IS CHARLES MOTIVATED?

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

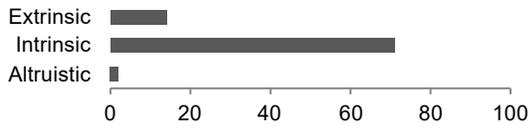
Intrinsics tend to be motivated by recognition, fulfillment, satisfaction, enjoyment, love of selling, mastery, or even when they have something to prove to others. They are often more consistent in a longer and more complex sales cycle.

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

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

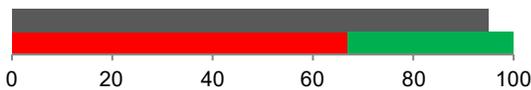
Charles's motivation style is:

## Intrinsic



Charles's overall level of motivation is:

95%

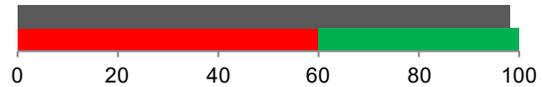


Charles may be driven by pride, satisfaction, mastery, achievement, competition, enjoyment, or recognition and could even be motivated to prove others wrong about what could be accomplished.

## Desire

Strong Desire for greater sales management success.

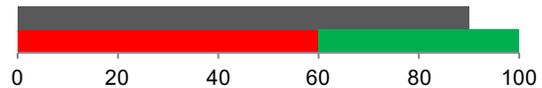
98%



## Commitment

Strong Commitment towards greater sales management success.

90%



## Other Factors

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

### Other Factors

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

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## WHAT IS CHARLES'S CAPABILITY TO HOLD SALESPEOPLE ACCOUNTABLE?

As we mentioned earlier, holding salespeople accountable to measurable, forward-looking behaviors and metrics is very important. By using forward-looking rather than lagging indicators, especially with longer sales cycles, adjustments and mid-course corrections can be made.

### The Accountability Competency

Manages Behavior	✓
Doesn't Accept Mediocrity	✓
Takes Responsibility	✓
No Need for Approval from Salespeople	✓
Beliefs Support Accountability	✓
Asks Questions	✓
Manages Pipeline *	✓
% of Attributes	100%
Weighted Score	100%

\* The following table provides additional detail on Charles's ability to manage the sales pipeline.

### The Pipeline Management Competency

Focused on Keeping Pipeline Full	✓
Properly Utilizing Pipeline Metrics	✓
Focused on Best Pipeline Metrics	✓
Focuses on New or Stalled Business	✓
Regularly Reviews Pipeline	✓
Spends Proper Time on Pipeline Reviews	✗
% of Attributes	83%
Weighted Score	85%

## Summary

We have reviewed whether or not Charles needs to be liked by salespeople, Charles's ability to be demanding, take responsibility, ask questions, and manage behavior and the pipeline. Based on these factors, Charles's current capability for holding salespeople accountable is good. Appropriate sales management training and coaching will help Charles fine-tune this competency.

## WHAT IS CHARLES'S CAPABILITY TO COACH SALESPEOPLE?

As we mentioned earlier, coaching has become the single most important competency for sales managers, now requiring 50% of their time. In addition, it is the single most difficult sales management competency to learn and master. In this chapter we will review the factors, skills and attributes that contribute to sales coaching effectiveness.

### The Coaching Competency

Consistently Coaches and Debriefs	✗
Debriefs Efficiently	✓
Asks Questions	✓
No Need for Approval from Salespeople	✓
Controls Emotions	✓
Has a Sales Process	✓
Beliefs Support Coaching	✓
Knows Why People Buy	✓
Knows How People Buy	✓
Doesn't Rescue the Salespeople	✗
Effective at Getting Commitments	✗
Handles Joint Sales Calls Effectively	✗
% of Attributes	67%
Weighted Score	70%

## Summary

We have described some the elements of coaching. Based on these factors, Charles's current capability for coaching salespeople is good. Appropriate sales management training and coaching will help to develop the capabilities to coach salespeople.



Charles believes that  
I can't let a salesperson lose a piece of business

## WHAT IS CHARLES'S ABILITY TO MOTIVATE SALESPEOPLE?

As we mentioned earlier, today's salesperson is a different breed than one from even 15 years ago. It's important to understand how your salespeople are motivated, what motivates them, and when to motivate them. We reviewed Charles's ability to develop relationships, run effective meetings, appropriately recognize salespeople, know what motivates salespeople and Charles's own self-image.

### The Motivating Competency

Knows What Motivates Salespeople	✓
Gives Recognition	✓
Runs Effective Sales Meetings	✓
Beliefs Support Motivation	✓
Strong Self Image	✓
Develops Strong Relationships	✗
Takes Responsibility	✓
Doesn't Accept Mediocrity	✓
Has Goals and a Plan	✓
	% of Attributes 89%
	Weighted Score 90%

## Summary

Based on our analysis, Charles's current capability for motivating salespeople is good. Sales Management training and coaching should help Charles fine-tune those capabilities in the near future.



Charles believes that  
Raising my people's self-esteem is not a high priority

## WHAT IS CHARLES'S CAPABILITY TO RECRUIT SALESPEOPLE?

Most sales management challenges can be eliminated when the ideal salespeople are identified, selected, hired and effectively on boarded. This chapter will take a closer look at Charles's capability for recruiting salespeople.

### The Recruiting Competency

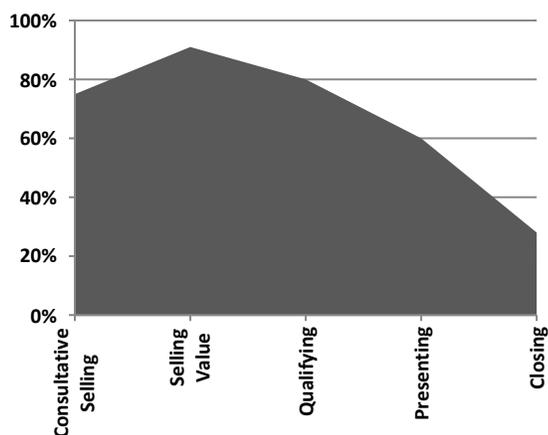
Hires the Best Person for the Position	✓
Great Interviewing Skills	✓
Uses Correct Hiring Criteria	✓
Upgrades the Sales Force	✓
No Need for Approval from Salespeople	✓
Recruits Consistently	✓
Good Decision Maker	✓
Beliefs Support Recruiting	✓
Develops Strong Relationships	✗
	% of Attributes 89%
	Weighted Score 95%

## Summary

Overall, Charles has the attributes that would support effective recruiting. Charles might not have put all of these attributes together yet. Charles needs to take these skills, integrate them, and recruit using a purposeful, thoughtful process to consistently select salespeople that are ideal for the role you have in mind.

## WHAT ARE CHARLES'S CURRENT SALES CAPABILITIES?

You indicated that you need a sales manager who also has direct sales responsibilities. Charles's current sales capabilities can be best illustrated by reviewing the graph below.



The graph tells a story that suggests the following capabilities:

**Consultative Selling** - Charles has most of the attributes required for selling consultatively.

**Selling Value** - Charles has most of the attributes required for selling value.

**Qualifying** - Charles has the attributes for effective qualifying.

**Presenting** - Presentation skills are fair.

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

## CAN CHARLES OPTIMIZE THE SALES CYCLE?

To answer this question we looked at 11 factors that historically support shorter sales cycles. Shorter sales cycles do not display the effects of delayed closings or business lost to competitors.

- **Makes Decisions** – Sales Managers that make buying decisions without having to think it over have Sales DNA that supports strategies and tactics to help their salespeople to get their prospects to make decisions, eliminating delays in closing.
- **Consultative Seller** – If salespeople can sell consultatively they can uncover the compelling reason to buy, a motivator that creates urgency and shortens the sales cycle.
- **Qualifier** – If sales managers are make sure that their salespeople qualify thoroughly there will be fewer opportunities for premature demos, quotes, proposals, and presentations that lead to delayed closings and lost business.
- **Won't Accept Put-Offs** – The ability to ask a question in response to a put-off can lead to closing more business at the first closing opportunity.
- **Doesn't Need to be Liked** – A sales manager that doesn't need to be liked accepts fewer put-offs because they aren't concerned about asking another question, pushing back, or challenging the salesperson or prospect.
- **Controls Emotions** – If sales managers do not panic in the heat of battle or become too excited when they hear what they want to hear, they can control the sales and/or coaching process more effectively.

- **Able to Discuss Money** – When sales managers are able to discuss finances they are more likely to uncover the actual budget and confirm the prospect's ability to spend it, whether directly or through their salespeople. That tends to prevent most of the delays blamed on money.
- **Rejection Proof** – When sales managers are unaffected by rejection they are more likely to ask good, tough, timely questions, even when the answer could result in a "no".
- **Healthy Skepticism** – When sales managers have a healthy skepticism, they can avoid happy ears, not mistake put-offs for promises, and have much better sense for determining realistic expectations.
- **Supportive Beliefs** – When sales managers have beliefs that support ideal sales outcomes they are more successful.
- **Effective Sales Process** – When the sales process lends itself to repeatable and desirable results, sales cycles tend to be much shorter while conversion ratios tend to be much higher.

**Factors**

Makes Decisions	✓
Consultative Seller	✓
Qualifier	✓
Won't Accept Put-Offs	✗
Doesn't Need to be Liked	✓
Controls Emotions	✓
Able to Discuss Money	✓
Rejection Proof	✓
Healthy Skepticism	✗
Supportive Beliefs	✓
Effective Sales Process	✓

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**Summary**

Charles has a moderate percentage of the 11 factors that support a shorter sales cycle. We believe that Charles's sales cycle can be shortened by following a formal, structured milestone-centric sales process. The other factors are important but the sales process will have the greatest impact.



Charles believes that My salespeople need to make presentations

**CAN CHARLES HELP YOUR SALESPEOPLE SELL MORE CONSULTATIVELY?**

**The Consultative Seller**

Selling has changed dramatically since 2008. The biggest changes are that:

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

Consultative Selling is an approach that helps salespeople and sales managers deal with the issues listed above.

When Consultative Selling is properly executed it can help salespeople and sales managers differentiate, sell value, and sometimes be viewed as a Trusted Advisor. As much as consultative selling relies on highly developed questioning skills, equally well-developed listening skills are an even more important component.

### The Consultative Seller Competency

Able to Stay in the Moment	✓
Uncovers Compelling Reasons to Buy	✓
Able to Listen/Ask with Ease	✓
Asks Enough Questions	✓
Asks Great Questions	✗
Able to Ask Tough Questions	✓
Takes Nothing for Granted	✓
Appropriate Amount of Patience	✗
Understands How Prospects Will Buy	✓
Develops Strong Relationships *	✗
Presenting at Appropriate Times	✗
Healthy Skepticism	✗
	% of Attributes 58%
	Weighted Score 75%

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

### The Relationship Building Competency

Quickly Develops Rapport	✗
Relationship Is Key Factor in Winning Business	✗
Develops Strong Relationships over Time	✓
Customers Follow to New Companies	✓
Believes That Making Friends Is Single Greatest Asset	✗
Is Extroverted	✓
	% of Attributes 50%
	Weighted Score 45%

## Summary

Overall, Charles has more attributes in place for consultative selling than we usually observe. While there is some room for improvement, it lays a nice foundation, and with the aid of advanced sales and sales management skills training and coaching, Charles will be able to master the consultative approach.

## CAN CHARLES HELP YOUR SALESPEOPLE SELL VALUE?

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

- **Learns Why Prospects Will Buy** – A sales manager's ability to uncover a prospect's reasons to buy helps the sales manager discover the true value in the opportunity.
- **Focused on Value over Price** – When sales managers buy value rather than seeking out the lowest price they are more likely to be effective at selling value. Sales managers who are price shoppers have the most difficulty upholding margins, creating and selling value, and competing against lower priced competitors.
- **Comfortable Discussing Money** – When sales managers are able to buy value when making their own purchases it is easier for them to discuss value and make sure that their salespeople and prospects see it the same way.
- **High Threshold for Money** – A sales manager with a High Money Threshold should be able to ask for a lot of money (not to be confused with Able to Discuss Money) without concern for the amount being "a lot" to them personally.

### The Selling Value Competency

Focused on Value over Price	✓
Comfortable Discussing Money	✓
High Threshold for Money	✓
Attempts to Sell Value	✓
Sales Process Supports Selling Value	✓
Learns Why Prospects Will Buy	✓
Doesn't Need Approval	✓
Asks Great Questions	✗
Asks Enough Questions	✓
Avoids Making Assumptions	✓
Quickly Develops Rapport	✗
Not Compelled to Quote	✗
% of Attributes 75%	
Weighted Score 91%	

### Summary

Charles is a value seller, and the most important element to selling value – the way Charles buys value - is in place.

## CAN CHARLES HELP YOUR SALESPEOPLE CLOSE?

### The Closer Competency

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

- Consultative selling skills
- Qualifying Skills
- Sales process (later in the document)
- Posturing Skills

### The Closer Competency

Gets Prospect To Agree To Make a Decision	✗
Will Meet with the Decision Maker	✗
Will Find a Way to Close	✗
Not Likely to Take "Think it Overs"	✓
Unlikely to be Derailed by Put-Offs	✗
Appropriate Amount of Patience	✗
Closing Urgency	✓
Isn't Hoping to be Liked	✓
Will Stay in the Moment at Closing Time	✓
Won't Make Inappropriate Quotes	✗
% of Attributes 40%	
Weighted Score 28%	



Charles believes that Prospects that think it over will eventually buy from us

### Sales Management Posturing

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

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

A flag icon indicates that Charles is neither strong nor weak in that particular quality.

### The Sales Management Posturing Competency

Good Self-Image	✓
Quickly Develops Rapport	✗
Sales Optimism	⚠
Sales Assertiveness (Occasionally Assertive)	⚠
Sales Empathy	⚠
Appropriate Amount of Patience	✗
Healthy Skepticism	✗
36%	

## Combined Impact of Competencies

This table shows the combined impact of the factors that affect Charles's ability to close and coach salespeople to close.

Factors	
Sales Process	✓
Consultative Seller	✓
Selling Value	✓
Qualifier	✓
Closer	✗
4	

## Summary

Charles has the elements in place to be effective at closing and coaching salespeople to close.

## CAN CHARLES HELP YOUR SALESPEOPLE FOLLOW AN EFFECTIVE SALES PROCESS?

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

## The Milestone-Centric Sales Process Competency

Follows Stages and Steps	✓
Process Has Most Key Milestones	✓
Process Has Adequate Sequence	✓
Consistent and Effective Results	✗
Little Wasted Time	✓
Has and/or Follows an Effective Process	✓
Uses an Effective Approach	✓
Relationship-Based	✗
CRM Savvy *	✓
Strategic Use of Sales Scorecard	✓
% of Attributes 80%	
Weighted Score 81%	

\* The following table provides additional detail regarding Charles's CRM familiarity and usage.

## The CRM-Savvy Competency

Lives in CRM	✗
Embraces CRM	✓
Updates Account Information at Least Daily	✓
Tracks Milestones Met in Sales Process	✓
Notates All Conversations	✗
Currently/Typically Uses CRM	✓
Competent CRM User	✓
Has Experience with Multiple CRM Applications	✓
% of Attributes 75%	
Weighted Score 70%	

\* The following table provides additional detail regarding Charles's competency with Social Selling tools.

## The Social Selling Competency

Connected to Potential Customers/Clients	✓
Generates Leads through Social Selling	✓
Well Connected	✓
Posts/Shares Updates for Visibility	✗
Uses LinkedIn	✓
Uses Twitter for Business	✓
LinkedIn Social Selling Index Score	✗
% of Attributes 71%	
Weighted Score 80%	

As mentioned previously, Charles has an effective sales process in place. The positive findings below are a reflection of that sales process, whereas any negative findings indicate areas where Charles could improve your sales process.

### Factors

Control of the Sales Process	✓
Avoids Wasting Time with Unqualified Prospects	✗
Avoids Purchasing at Start of Sales Process	✓
Uncovering the Budget	✓
Appropriate Follow-Up	✗
3	

## CAN CHARLES HELP YOUR SALESPEOPLE MORE ACCURATELY FORECAST SALES?

When a pipeline is used effectively, you will always know whether the number of opportunities in the pipeline is sufficient to support the goals or quotas. When salespeople are qualifying effectively there will be improved accuracy when it comes to forecasting revenue and projected closing dates.

The pipeline is the most important predictor of future business success. How does Charles measure up in that area?

### The Qualifier Competency

#### The Qualifier Competency

Meets with Decision Maker	✗
Uncovers Actual Budget	✓
Will Discuss Finances	✓
Knows decision-making Process	✓
Handles High-Ticket Pricing OK	✓
Doesn't Let Being Liked Get in the Way	✓
Able to Stay in the Moment	✓
Self-Limiting Beliefs Won't be an Obstacle	✓
Knows Why They Would Buy	✓
Asks about Everything	✓
Not Vulnerable to Competition	✓
% of Attributes 91%	
Weighted Score 80%	

### Summary

Based on Charles's strong qualifying competency it is reasonable to believe that the pipeline and forecast will be equally predictive and accurate.



Charles believes that Prospects are honest

## WILL CHARLES EFFECTIVELY NEGOTIATE CONTRACTS?

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

### The Negotiator Competency

Seeks Win/Win	✓
Willing to Walk	✓
Appropriate Amount of Patience	✗
Able to Listen/Ask with Ease	✓
Controls Emotions	✓
Goal Oriented	✓
Problem Solver	✓
Doesn't Need to be Liked	✓
Rejection Proof	✓
Selling Value	✓
Able to Discuss Money	✓
% of Attributes 91%	
Weighted Score 90%	

### Summary

Charles has most of the attributes of a negotiator.