

Objective  
Management  
Group

# Maya Martinez

ABC Company

**June 19, 2023**

Sales Candidate  
Assessment

ABC SALES  
MODERATE DIFFICULTY

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This analysis provides your organization with insights that explain how the ways an individual thinks and acts may affect their success in sales.

Summary insights for you include:

- A **dashboard** that summarizes all of the candidate's competency scores. Based on the candidate's scores, the dashboard will indicate that they are Recommended, Worth of Consideration, or Not Recommended for your role.
- The individual's **Compatibility** attributes. Use this to assess how strong of a fit the individual is for the unique circumstances of your organization.

On the dashboard, you'll find an analysis of this individual's Sales Percentile, an aggregate score of OMG's Core Competencies.

OMG's Core Competencies are divided into three Competency Groups. Will to Sell measures an individual's sales-specific drive to succeed, Sales DNA measures the core underlying beliefs and actions that either support or limit sales success, and Tactical Competencies measure skills and abilities necessary throughout the sales lifecycle.

The dashboard also includes the individual's Development factors, Scoring Confidence, and Intangibles (if any were identified). Use the Development factors to understand how receptive an individual will be to coaching and how quickly they can ramp up in a new sales role; Use the Intangibles to understand additional factors which may be contributing to an individual's success; Use the Scoring Confidence score to gauge if the individual answered questions honestly.

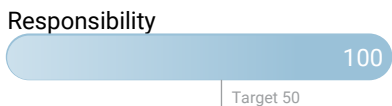
While our recommendations have been statistically validated by an independent 3rd party, a sales-specific assessment should be one factor in your overall hiring process.



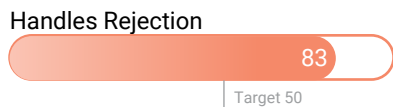
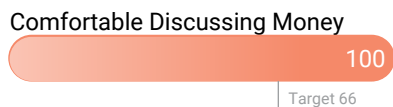
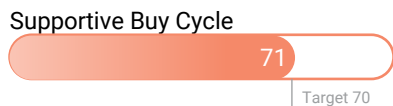
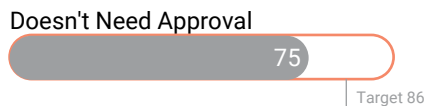
**RECOMMENDED**  
IDEAL RAMP-UP SKILLS

Meets OMG Criteria YES  
Meets Role Criteria YES

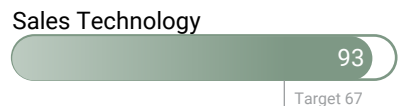
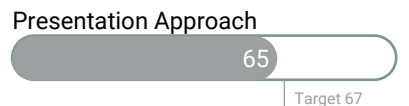
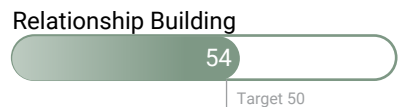
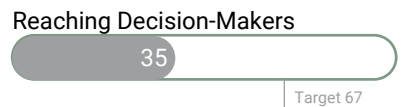
**Will to Sell** **88**  
Target 60



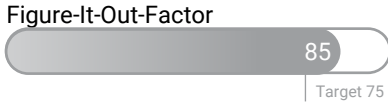
**Sales DNA** **85**  
Target 68



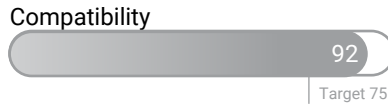
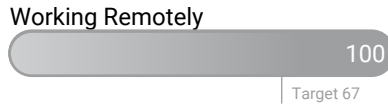
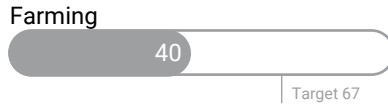
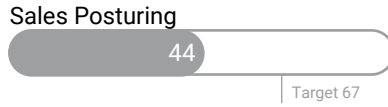
**Tactical** **72**  
Target 67



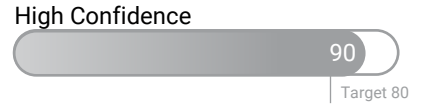
### Development



### Other



### Scoring Confidence



Inconsistent Answer Sets: 1  
Highly Concerning

### Intangibles

Winning Personality

Industry Expert

Provides Award-Level Service

Extremely Well-Liked / Loved

Extremely Well-Known

# Recommendation for an Interview

**RECOMMENDED**  
IDEAL RAMP-UP SKILLS

Meets OMG Criteria YES  
Meets Role Criteria YES

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

Even when a candidate is recommended or worthy of an interview, it is critical that you have a formal ramp up plan, strong sales management and success measurements that ensures the success of all new hires. Make sure that Maya is willing to overcome the need for approval.

## OMG Criteria

- Will to Sell
- Meets minimum Sales DNA of 68 for difficulty level

## Role-Specific Criteria

- Value seller
- Will hunt for new business
- Entrepreneurial seller

# Interview Tips

One of the advantages of using OMG's Candidate Assessment in the first step of the recruiting process is that you do not have to waste time with candidates that you won't be hiring. We recommend that you interview only those candidates that have been recommended. The following interview suggestions are based on various findings within this document.

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Ask if Maya likes people. From a sales perspective, ask which is more important, making someone happy or getting the business. You'll probably hear either "both" or "making someone happy." This demonstrates need for approval.

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Inquire about past or present professional sales training that might account for the high number of positive findings.

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

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

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

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Ask "Why do customers like you?" (Need for Approval)

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Ask "Why do customers trust you?" (Need for Approval)

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Ask "What could you do to have customers like and trust you more?" (Need for Approval)

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In your previous job, much of the business was either call-in or residual yet you hit your numbers. How will you hit your numbers when none of the business comes to you and you have to find the new business yourself?

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Check the resume to determine if there is a correlation between the typical tenure at past employers and the low likelihood of being able to retain Maya.

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Ask how Maya challenges prospects who want him/her to "call back," given that Maya indicated that there aren't any think it overs and that he/she doesn't make follow up calls.

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# Longevity

Longevity measures the likelihood of a new employee staying in a role long enough for the company to achieve an acceptable return on their investment of time and money during ramp-up.

The table to the right shows, for both the average candidate and this specific candidate, how long ramp up will take, how long it will take for the company to break even on their initial investment, and how long it will take for the company to achieve a 5X ROI on that investment.

Because this candidate's Figure-It-Out-Factor is significantly above our expectations for a typical learning curve, their timeframes are shorter than the average candidate.

Five factors contributed to determining this candidate's Longevity:

- The candidate's Figure-It-Out-Factor is just outside the range that supports longevity.
- The candidate's Sales Percentile is well outside the range that supports longevity.
- The candidate's years in sales are in the range that supports longevity.
- Your Role Specification calls for closely managing the salesperson which supports longevity.
- Your Role Specification calls for a compensation plan that does not support longevity.



	Average Candidate	This Candidate
Ramp-Up Time	1 year 2 months	10 months
Break Even	2 years 3 months	1 year 7 months
Time to 5X ROI	7 years 8 months	5 years 4 months



# Will to Sell

The Will to Sell Competencies measure a salesperson's overall drive to achieve success in sales. Without strong Will to Sell, it is difficult for an individual to change their habits or learn new skills.

**When this is an Opportunity for Growth, an individual might...**

**When this is a Strength, an individual might...**

**Desire**



tend to prioritize non-sales activities, lack urgency, or lack concern about sales results.

feel urgency to take action, prioritize sales results, or care deeply about achieving sales results.

**Commitment**



give in to discomfort, avoid difficult selling scenarios, or not do what is required to achieve sales quota.

persevere in selling to a difficult prospect, push forward despite their own discomfort, or do what is required to achieve sales quota.

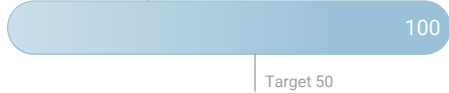
**Outlook**



feel frustrated, demotivated, or distracted by their career prospects.

feel positive, focused, and appreciative about their career prospects.

**Responsibility**



rationalize poor sales results by pointing to the economy, the competition, or the company.

hold themselves accountable for any lack of sales results.

**Motivation**

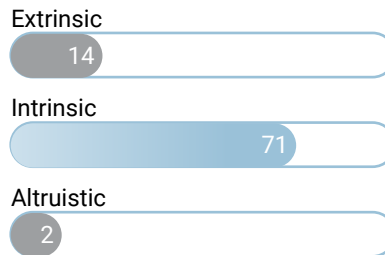


not have a meaningful dream or goal to fuel the work they do to achieve sales success.

have a compelling dream or goal to drive sales performance.

# Motivation

## Motivational Style: Intrinsic



### Motivational Attributes

- Enjoys Selling
- Has Personal Goals
- Has Written Personal Goals
- Has Written Personal Goals with Date
- Meaningful Goals
- Plan for Reaching Personal Goals
- System to Track Progress

### Motivational Tendencies

- Loving to win **more than** hating to lose
- Self-rewarding performance **instead of** spending money first to create pressure to perform
- Self-pressure **instead of** being pressured
- Self-management **instead of** being closely managed
- Self-competition **over** competing against others
- Satisfaction **over** recognition

DOESN'T NEED APPROVAL

STAYS IN THE MOMENT

SUPPORTIVE BELIEFS

SUPPORTIVE BUY CYCLE

COMFORTABLE DISCUSSING MONEY

HANDLES REJECTION

# Sales DNA

The Sales DNA Competencies measure a salesperson's beliefs and actions that support or limit success in sales. Salespeople are often unaware of how their biases can negatively impact their interactions with customers.

**When this is an Opportunity for Growth, an individual might...**

**When this is a Strength, an individual might...**

## Doesn't Need Approval



avoid asking lots of questions or challenging the status quo, because they worry about upsetting their customer.

be able to ask tough questions and challenge their customers to earn their respect.

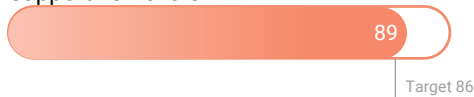
## Stays in the Moment



find it difficult to capture what their prospects are saying because their self-talk captures their attention.

be able to remain objective and actively listen to their prospects and customers.

## Supportive Beliefs



put constraints on their actions because of negative sales-specific self-talk.

feel empowered to take positive action without being sabotaged by negative sales-specific self-talk.

## Supportive Buy Cycle



side with their prospect's objections to price, desire to comparison shop, or indecision because it is similar to how they buy.

be able to push back over price objections, competition, and indecision.

## Comfortable Discussing Money



skip the conversation about purchase budget because they find it too uncomfortable.

lean into discussions about budget and/or how to find funding that isn't readily available.

## Handles Rejection



feel hurt and hesitate for some period of time before reaching out to a prospect after being rejected.

get back on another sales call immediately after being rejected without feeling hurt.

# Supportive Beliefs

OMG's research has found that high self-awareness is especially important for salespeople. Self-awareness helps you better understand the belief systems that you're consciously or unconsciously bringing into your sales calls. It also helps you understand how you might interpret a client's response to you.

Below we've listed some Self-Limiting Beliefs that your responses indicated you hold, along with the corresponding Supportive Beliefs that you can develop with training and coaching.

Self-Limiting Belief		Supportive Belief
I need to educate my prospects	»	I have the ability to limit how much my prospects conduct research
I have to work with the procurement department before I can call on end users or decision-makers	»	I have the ability to call on decision makers
Prospects are honest	»	I maintain healthy skepticism about what prospects tell me
It's not OK to confront a prospect	»	I am comfortable tactfully dealing with confrontation, regardless of the consequences
I'm able to live comfortably on my current income	»	I am driven by my personal financial goals

# Supportive Buy Cycle

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Does Not Think Over Purchases

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Does Not Research

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Does Not Price Shop

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Does Not Comparison Shop

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High Threshold for Money

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# Tactical

Tactical Competencies measure the selling capabilities necessary to successfully find and guide potential customers through the sales process.

**When this is an Opportunity for Growth, an individual might...**

**When this is a Strength, an individual might...**

## Hunting



prefer to wait for inbound leads before reaching out to prospects, and when there aren't enough, choose to not prospect.

proactively and consistently look for new business by reaching out to targeted prospects.

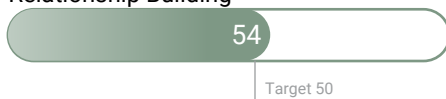
## Reaching Decision-Makers



not push to reach a decision maker, as they are more comfortable continuing the conversation with their existing contact.

find a way to reach the person responsible for deciding to purchase the products or services offered, even at the risk of seeming "pushy".

## Relationship Building



limit themselves to just rapport building and not make an effort to develop a lasting friendship.

nurture and develop strong relationships by proactively and consistently talking with a customer until they become a friend.

## Consultative Selling



present earlier in the sales process than is prudent, before learning about the prospect's problems, consequences, and reasons for buying from them.

uncover compelling reasons for prospects and customers to buy from them by using active listening skills to ask good, tough, and timely questions.

## Selling Value



talk about their service's value without personally being part of the value, leading to a buying decision based on price.

position themselves as a trusted advisor and provide the customer with crucial solutions unavailable elsewhere.

## Qualifying



tend to prematurely prepare a quote, proposal, or presentation.

ask about everything that could possibly derail an opportunity before determining that it is fully qualified.

**Presentation Approach**



be more focused on presenting the product or solution than considering the timing, specific topics, or who should be in attendance.

be very thoughtful about what to present, when to present, and to whom it should be presented.

**Closing**



tend to accept stalling, and work to close the business through their follow-up efforts.

get a verbal agreement in advance of the expected closing call or meeting, and be certain of getting a decision.

**Sales Process**



proceed through a sales process based on how they think things are going and what they think they need to do next.

have a formal, staged, milestone-centric sales process that provides repeatable, predictable results.

**Sales Technology**










not be proficient with CRM, ignore LinkedIn, and choose face-to-face meetings over video.

be a daily user of CRM, frequent user of LinkedIn, and a regular user of video for sales calls and meetings.

# Hunting

The Hunting Competency measures an individual's capabilities for finding new business opportunities, including the Sales DNA that should support those efforts.

	<b>Will Prospect</b>	The willingness to prospect for new business is the single most important driver that leads to maintaining pipeline.
	<b>Prospects Consistently</b>	Prospecting must be done regularly to keep the pipeline full.
	<b>Prospects via Phone and / or Walk-ins</b>	If the role requires it, individuals should be comfortable making "cold calls" (where the prospective customer doesn't know you).
	<b>Has No Need for Approval</b>	While hunting for new business, it is important for individuals to be able to stay objective about negative interactions with prospects.
	<b>Schedules Meetings</b>	Being able to meet with prospects gives an individual a great start to filling their pipeline.
	<b>Recovers from Rejection</b>	The ability to handle rejection allows an individual to swiftly move on from one opportunity to the next without needing time to recover or becoming emotionally drained.
	<b>Maintains Full Pipeline</b>	Individuals should understand the importance of maintaining a full pipeline when hunting for new opportunities.





Not a Perfectionist or it Does Not Prevent Prospecting

Perfectionism should not delay opportunities.



Believes They Are Quickly Liked by Customers

When customers tend to quickly like an individual, it can open the door to more engagement while hunting for opportunities.



Reaches Target Prospect

Individuals should be able to get beyond gatekeepers and waste little time in the process, allowing them to discover more opportunities.



Gets Referrals from Customers / Network

When appropriate, individuals should work to regularly receive referrals and introductions from existing customers.



Uses Social Selling Tools

Having strength in the Social Selling Competency gives an individual another channel they can harness to find new opportunities.



Attends Networking Events

Networking events can often be used to discover additional opportunities.

# Reaching Decision-Makers

The Reaching Decision-Makers Competency measures an individual's ability to reach and meet with the actual decision-makers.



Calling on Actual Decision Maker

The tendency to speak with the final decision maker allows individuals to uncover the real problems, discover the actual budget, learn what it will take to win the business, and shorten the sales cycle.



Believes Speaking with Decision Makers Is Required

Individuals who understand the importance of having a conversation with the decision-maker have an advantage over salespeople who do not.



Reaching Decision Maker Is Milestone in Sales Process

Reaching the decision maker should be a milestone in an effective sale process.



Does Not Need to be Liked

Having strength in the Doesn't Need Approval Competency helps individuals push prospects to put them in touch with the actual decision maker.



Comfortable with Targeted Decision Maker

Individuals should have experience and be comfortable calling on the types of decision makers that their sales organization needs them to reach.



Doesn't Begin Sales Process with Buyers

Individuals should not feel compelled to call on purchasing agents, beginning their sales process instead with people who have problems that they can solve.










Uses Selling Skills to Reach Decision Maker

Individuals who have strategies and tactics to help them reach decision makers are better able to uncover compelling reasons those customers would buy from them.








# Relationship Building

The Relationship Building Competency measures an individual's ability to quickly begin, nurture, and develop strong relationships over time.

	<b>Quickly Develops Rapport</b>	The ability to quickly develop rapport during the first conversation helps prospects feel more comfortable.
	<b>Relationship Is Key Factor in Winning Business</b>	Individuals who sell in an industry where relationships are the key factor in getting, maintaining, and growing business tend to place extra importance on building relationships.
	<b>Relationships Generate New Business</b>	Individuals should be able to build the kind of relationships that generate referrals and introductions that convert to business.
	<b>Develops Strong Relationships over Time</b>	Individuals should be able to develop strong rapport, and also have long-term ongoing relationships with customers.
	<b>Customers Follow to New Companies</b>	Past customer relationships strong enough that the customer has followed you to a new job demonstrates the ability to build strong relationships.
	<b>Believes That Making Friends Is Single Greatest Asset</b>	Individuals who view making friends with prospects and customers as the single most important thing they do may find it easier to build relationships.
	<b>Extroversion Supports Relationship Building</b>	The tendency not to self-identify as an extrovert could (but doesn't necessarily) mean that an individual doesn't enjoy building relationships.

# Consultative Selling

The Consultative Selling Competency measures to what degree an individual has developed the ability to actively listen and ask an appropriate number of relevant, challenging, and timely questions to uncover a prospect's compelling reasons to buy.

	Able to Stay in the Moment	Staying in the moment allows an individual to respond appropriately and maintain control of the conversation, instead of worrying or preparing a rebuttal.
	Uncovers Reasons to Buy	An individual should listen to their prospects and learn why they would make a purchase.
	Reasons to Buy Are Compelling	Uncovering compelling reasons why a prospect would buy can accelerate a sales cycle by encouraging customers to act quickly.
	Able to Listen/Ask with Ease	Individuals should have the ability to listen to customers and avoid dominating the conversation.
	Asks Enough Questions	Individuals who ask lots of questions give prospects an opportunity to share their concerns, opinions, and budget.
	Asks Great Questions	Asking great questions helps uncover important information, differentiates individuals from the competition, and shortens the sales process.
	Gets Prospects Past "Nice to Have"	Individuals should have the ability to get prospects to view what they are selling as something the prospect <b>MUST HAVE</b> , as opposed to something that is nice to have.



Will Build Trust

Building Trust supports an individual's ability to sell consultatively, since prospects tend to share more with someone they trust.



Able to Ask Tough Questions

Individuals who ask tough questions are able to challenge customers, ask appropriately provocative questions, and gain deep insight into their customer's problems.



Takes Nothing for Granted

Avoiding making assumptions helps individuals ask better questions and discover more about their prospect's needs.



Manages Appropriate Amount of Patience

Individuals who exhibit an appropriate amount of patience walk the line between not accepting delays while also not coming across as pushy.



Understands How Prospects Will Buy

It is important to discover who will make the decision to buy, and also the process they'll use to decide whether to buy.



Develops Strong Relationships

Individuals who are strong at developing relationships are better able to sell consultatively.



Presenting at Appropriate Times

Individuals with good intuition for when to present and when to have a two-way conversation with customers avoid placing too much importance on educating prospects.



Healthy Skepticism

Maintaining a healthy skepticism and not being overly trusting of prospects helps salespeople get more accurate answers to tough questions.

# Selling Value

The Selling Value Competency measures an individual's capabilities for selling value instead of focusing on price.

	Focused on Value over Price	The tendency not to shop around for the best price helps individuals avoid being sympathetic to prospects who want to compare a price with competitors. In doing so, individuals are able to better keep the conversation on value as opposed to price.
	Will Discuss Finances	Individuals who are comfortable discussing finances are able to have in-depth conversations to determine exactly how much their prospect will spend and navigate challenging budget issues.
	High Threshold for Money	A supportive Buy Cycle prevents an individual from being sympathetic to prospects and customers when they push back on the cost of what the individual is selling.
	Attempts to Sell Value	The tendency to hold firm when a prospect asks for a lower price helps individuals keep the focus of conversations on value as opposed to price.
	Sales Process Supports Selling Value	An effective sales process should consist of the important milestones that support identifying value opportunities for prospects.
	Learns Why Prospects Will Buy	Individuals should listen to customers to determine why they will make a purchase, which helps that individual keep the conversation on those reasons instead of price.



Doesn't Need Approval

Strength in the Doesn't Need Approval Competency helps individuals push back when a prospect is focused more on price than value.



Asks Great Questions

Asking great questions allows individuals to uncover insights that help them find ways to sell on value over price.



Asks Enough Questions

The tendency to ask lots of questions will help individuals uncover opportunities to help prospects focus on the value of their solution as opposed to the price.



Avoids Making Assumptions

Individuals who do not tend to make assumptions are able to dig deeper into a prospect's needs and discover opportunities to articulate the value of their solution.



Quickly Develops Rapport

Being able to quickly develop rapport with prospects helps individuals steer conversations with prospects away from price and keep the focus on value.






Not Compelled to Quote

Individuals who are careful to only create quotes or proposals when they know they are going to win the business are able to avoid inadvertently shifting the focus to price when it should be on value.



# Qualifying

The Qualifying Competency measures how thoroughly and effectively an individual qualifies their prospect's ability to buy from them, assuring more accurate forecasts.

	Meets with Decision Maker	Strength in the Reaching Decision-Makers Competency helps individuals get the information they need to fully qualify opportunities.
	Uncovers Actual Budget	Individuals who are successful at getting prospects to share how much money they can spend are better able to properly qualify opportunities.
	Will Discuss Finances	Comfort talking about money with prospects is critical to determining whether an opportunity is qualified to move forward in the sales process.
	Knows Decision-Making Process	Individuals should be able to successfully get prospects to disclose the process they will use to decide whether to buy from them.
	Can Influence the Decision-Making Process	Individuals should be able to effect changes to a prospect's decision-making process when it is overly complex, unfavorable, and impeding an opportunity.
	Handles High-Ticket Pricing OK	Individuals should be comfortable handling customers' objections to a solution costing a lot of money.



Need to Be Liked Doesn't Get in the Way

Strength in the Doesn't Need Approval Competency helps individuals hold their ground on fully qualifying opportunities before moving them forward in the sales process.



Able to Stay in the Moment

Strength in the Stays in the Moment Competency helps individuals avoid letting their emotional connection to an opportunity cloud their ability to properly qualify it.



Self-Limiting Beliefs Won't be an Obstacle

Supportive Beliefs help ensure that individuals are objectively qualifying opportunities.



Knows Why They Would Buy

Individuals should be able to uncover the truly compelling reasons why a prospect would buy from them.



Asks about Everything

The ability to avoid making assumptions and rely on factual information helps individuals objectively qualify opportunities.



Not Vulnerable to Competition

When individuals don't tend to comparison shop in their personal life, they are more likely to push back when a prospect wants to comparison shop.

# Presentation Approach

The Presentation Approach Competency measures to what degree an individual presents the right content, at the right time, to the right people, and for the right reasons.

<input checked="" type="radio"/>	<b>Emphasizes Listening over Talking</b>	The ability to listen more than talk serves individuals well during presentations, when prospects may reveal additional details about the opportunity.
<input checked="" type="radio"/>	<b>Able to Minimize Talking about Company Products or Solutions</b>	Individuals should spend more time asking questions than talking about their company and what they are selling. This keeps presentations interesting and tailored to the prospect.
<input type="radio"/>	<b>Not Compelled to Present</b>	Individuals should have a practical view on the importance of presenting, allowing them to avoid presenting when it is not required.
<input type="radio"/>	<b>Not Overly Reliant on Educating and Presenting</b>	Presenting should be balanced with other sales skills such as asking challenging questions and qualifying.
<input checked="" type="radio"/>	<b>Does Not Believe Presenting Equates to Controlling the Sales Process</b>	Individuals shouldn't need to be presenting to feel in control of the selling process.
<input checked="" type="radio"/>	<b>Does Not Believe Making A Proposal is the Most Important Part of the Sales Process</b>	Individuals should feel that making a proposal is less important than other aspects of the sales process such as selling consultatively and qualifying the opportunity.
<input type="radio"/>	<b>Not Compelled to Propose or Quote</b>	Individuals should have a healthy outlook on when it is acceptable to create proposals or quotes and present at an appropriate time in the sales process.



**Asks Enough Questions**

Individuals should understand the importance of not dominating the conversation during sales calls. While presenting solutions, this same attribute can help individuals find opportunities to learn more about their customer's needs.



**Takes Nothing for Granted**

Individuals should rely on factual information as opposed to assumptions or hunches, which helps individuals tailor their presentations to each prospect's needs.

# Closing

The Closing Competency measures an individual's ability to get commitments and decisions when an opportunity becomes closable.

<input type="radio"/>	Gets Prospect to Agree to Make a Decision	When an individual is able to get their prospects to agree when decision-making will take place, it allows them to shorten their sales cycle and ensures presentations and proposals are accompanied by a decision.
<input type="radio"/>	Will Meet with the Decision Maker	An individual who is strong in the Reaching Decision Makers Competency will generally talk to the right people to be able to close opportunities.
<input type="radio"/>	Will Find a Way to Close	Individuals strong at closing are able to consistently get their prospects to agree to make a decision before trying to close the opportunity.
<input checked="" type="radio"/>	Not Likely to Take "Think it Overs"	Individuals who don't tend to mull over purchases are able to push back when prospects ask for time to think over their purchase.
<input type="radio"/>	Unlikely to be Derailed by Put-Offs	Individuals who are able to successfully avoid prospect's stalls can focus instead on tangible next steps and decisions.
<input type="radio"/>	Manages Appropriate Amount of Patience	An appropriate amount of patience at closing time means not being too impatient to appear pushy and not being too patient to accept delays.



Closing Urgency

Individuals should appropriately push back when their prospect asks them to follow up later about a final purchasing decision.



Isn't Hoping to be Liked

Strength in the Doesn't Need Approval Competency helps individuals push deals over the finish line.



Will Stay in the Moment at Closing Time

Strength in the Stays in the Moment Competency helps individuals stay objective at closing and avoid emotion clouding their judgement.










Won't Make Inappropriate Quotes

A good perspective on quotes and proposals means only generating them when the business is likely to be won.

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# Sales Process

The Sales Process Competency measures an individual's ability to follow the proper sequence of stages and milestones of a structured sales process.

	Follows Stages and Steps	An effective sales process should include appropriate stages or steps.
	Process Has Most Key Milestones	A sales process should have the key milestones necessary to be effective.
	Process Has Adequate Sequence	An effective sales process should have a proper sequence of activities.
	Consistent and Effective Results	An individual's sales process should produce consistent and effective results.
	Little Wasted Time	Individuals should minimize the time they waste with prospects that don't buy from them.
	Has and/or Follows an Effective Process	Individuals should follow a true sales process as opposed to a series of activities.
	Uses an Effective Approach	An effective sales process should help to lead predictable sales results.



Relationship-Based

Strength in the Relationship Building Competency will help individuals when their sales process requires building a strong relationship with prospects in order to win the business.



CRM Savvy

Strong CRM skills supports adherence to a structured sales process.



Strategic Use of Sales Scorecard

Individuals should consider regularly using a scorecard that predicts the likelihood of winning business as part of qualifying prospects.



# Sales Technology

The Sales Technology Competency measures an individual's ability to successfully leverage CRM, professional social media, and video selling tools.



## CRM Savvy

Individuals should have experience with CRM and embrace it as a necessary part of sales success.



## Social Selling

Individuals should be proficient at not only using professional social media tools, but also leveraging them for sales success.



## Video Proficient

Individuals should have the skills and passion necessary to effectively sell to customers via video.

# Other

These Competencies measure capabilities that may not apply to all selling roles and salespeople. The importance of these competencies depends on the salesperson's role.

**When this is an Opportunity for Growth, an individual might...**

**When this is a Strength, an individual might...**

**Sales Posturing**



appear to lack authority or make a negative first impression.

make a good first impression by being positive, confident, and memorable.

**Negotiating**



attempt to persuade customers for a short time and then agree with their customer's demands.

be willing to walk away, ask questions, and seek a win-win outcome.

**Building Trust**



have integrity but behave in a way that causes customers to become defensive.

be viewed by prospects and customers as authentic, reliable, and accountable.

**Account Management**



take their customers for granted, and/or be content with incremental account growth

actively service the account, proactively solve problems, and nurture the customer relationship to maintain that account's business.

**Farming**



have relationships that aren't strong enough to leverage for an increase in a customer's revenue.

leverage their good relationships with stakeholders at a customer to achieve account growth.

**Working Remotely**



be more effective in an office environment with close supervision.

thrive working remotely without close supervision.

**Compatibility**



be uncomfortable with many of the requirements for this role.

have experience with many of the requirements for this role.

# Sales Posturing

The Sales Posturing Competency measures an individual's ability to make positive first impressions, differentiate themselves, and be memorable.



Good Self-Image

A strong self-image helps individuals maintain a sense of being rejection-proof and makes individuals memorable relative to competitors.



Quickly Develops Rapport

Individuals should strive to build rapport on or during their first meeting with a prospect.



Sales Optimism

The tendency to expect positive outcomes in selling situations helps make a positive impression on prospects and makes prospects more comfortable.



Sales Assertiveness

Individuals should exhibit an appropriate amount of assertiveness with customers, being neither too timid nor too overconfident.



Sales Empathy

Individuals should have a good combination of being able to empathize with their prospects' problems while not empathizing with their prospects' stalls, put-offs, objections, and excuses.



Appropriate Amount of Patience

Individuals should exhibit an appropriate amount of patience with prospects and customers, not being too impatient to appear pushy and not being too patient to accept stalling tactics, leaving customers with a good impression of them.



**Will Build Trust**

Strength in the Building Trust Competency helps an individual be memorable and make a lasting impression.



**Good Listener**

During conversations, listening far more than you talking helps customers feel understood and positively differentiates the individual.










**Healthy Skepticism**

Not being overly trusting of prospects makes individuals more comfortable asking questions and also more memorable.

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# Negotiating

The Negotiating Competency measures an individual's ability to effectively negotiate terms, prices, and conditions throughout the sales process.

	Seeks Win/Win	Individuals who are strong negotiators tend to find "win/win" outcomes, where both they and their customer get something they want.
	Willing to Walk	An important strategy while negotiating is being willing to walk away from negotiations if they are not going well.
	Manages Appropriate Amount of Patience	Individuals should exhibit an appropriate amount of patience while negotiating, not being too impatient to appear pushy and not being too patient to accept stalling tactics.
	Able to Listen/Ask with Ease	Individuals who know the value of listening more than talking are able to uncover advantages during a negotiation.
	Able to Stay in the Moment	When negotiating, individuals should be able to remain focused and not allow emotions to cloud their objectivity.
	Goal Oriented	Strong organizational tendencies in an individual's personal goal management also help them with the organizational skills necessary to successfully negotiate complex situations.
	Problem Solver	Successful negotiation involves thinking of solutions, as opposed to worrying about problems or getting consumed by them.



Doesn't Need to be Liked

Individuals should be willing to accept that a negotiation may negatively impact how much a customer likes them.



Rejection Proof

The ability to swiftly recover from rejection allows an individual to respond during negotiations.



Selling Value

Strength in the Selling Value Competency helps individuals identify positive outcomes in negotiations.



Will Discuss Finances

Individuals with the ability to discuss money with a great deal of ease are able to more effectively negotiate aspects of an opportunity related to money or challenge a prospect's money-related pushback.

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# Building Trust

The Building Trust Competency measures whether an individual is seen as trustworthy by their customers and prospects.

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<input type="radio"/>	Gains Trust Early	Individual should be able to get their prospects to trust them early in their conversations, helping establish credibility.
<input type="radio"/>	High Integrity Seller	Individuals who, when faced with conflicting business choices, favor honoring existing commitments over new opportunity tend to be able to build strong trust with customers.
<input checked="" type="radio"/>	Customers Share Information Early	When customers share information early in the sales process, it opens the door to take a consultative approach.
<input checked="" type="radio"/>	Gets First Call from Customers	An individual should strive to have their customers consult or include them early in the planning process, suggesting they are more inclined to give them their business.
<input type="radio"/>	Quickly Develops Rapport	Building rapport on the first call/meeting supports the ability to quickly build trust.
<input type="radio"/>	Believes They Are Quickly Liked by Customers	Individuals who can quickly build rapport tend to build more trust with their customers.

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# Account Management

The Account Management Competency measures an individual's ability to manage, maintain, and grow multiple assigned accounts.



Has Strong Relationships

Strong abilities in the Relationship Building Competency also support an individual's ability to form the long-running relationships necessary to be an effective account manager.



Will Handle Organizational Politics

When a customer exhibits unpredictable behavior, it is useful try to discover why instead of making assumptions. This same curiosity can also help individuals uncover hidden opportunities and overcome obstacles.



Will Make Friends Everywhere

The desire to be considered a friend and/or liked by customers is non-supportive in other areas of sales, but can help an individual be a more effective account manager.



Will Follow Up Often

An individual's tendency to follow up often with customers helps ensure that they will be viewed as a trusted resource and provides that individual with more opportunities to develop additional opportunities.



Will Meet/Talk with Decision Makers

Being strong in the Reaching Decision Makers Competency also helps account managers move beyond their usual contact to the actual decision maker when needed.



Will Know the Real Budgets

Getting customers to share their budget helps account managers uncover additional opportunities.





**Won't Feel Urgency to Close Business**

When an individual is patient regarding getting commitments from customers, it makes customers more comfortable and helps them see the individual as a trusted resource.



**Won't Alienate People**

While enjoying the approval of customers is a negative for other areas of sales, it is helpful in account management.



**Will Focus on Current Accounts Rather than Looking for New Accounts**

Individuals who are not inclined to hunt for new customers tend to focus on managing existing customers as opposed to hunting for new ones, making them more effective at account management.



**Will Manage Time Effectively**

Excellent organizational skills help an individual be an effective account manager.

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# Farming

The Farming Competency measures an individual's ability to grow a small number of key accounts.

<input type="radio"/>	Attempts to Close	Individuals should place tremendous importance on getting a customer to agree to decide, and consistently get customers to agree to decide before trying to close.
<input type="radio"/>	Has Closing Urgency	When a customer asks someone to follow up about a decision later, that individual should appropriately push back to discover why.
<input checked="" type="radio"/>	Won't "Understand" Most Objections	Individuals with supportive buying habits in their personal life are less likely to sympathize with customers' objections.
<input checked="" type="radio"/>	Won't Panic Over Objections	Being strong in the Stays in the Moment Competency allows individuals to stay objective when existing customers have objections.
<input checked="" type="radio"/>	Handles "It's a Lot of Money" Objection	Individuals with a healthy perspective on value can respond appropriately when a customer objects to something costing a lot.
<input type="radio"/>	Won't Accept Put Offs	Individuals must be able to avoid put offs when scheduling meetings with their existing customers or trying to close opportunities.
<input type="radio"/>	Believes They Are Quickly Liked by Customers	When an individual is quickly liked by customers and/or they are able to quickly build rapport, they are able to gain more business from existing customers.



**Won't Alienate Customers**

While enjoying the approval of customers is a negative for other areas of sales, it is helpful in establishing long-running relationships to farm additional business.




**Unlikely to be Distracted by New Accounts**

Individuals who don't enjoy hunting for new customers tend to be able to place more energy on getting more business from existing customers.


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# Working Remotely


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 Works Independently


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 Effective Time Management


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 Self-Starter

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 CRM Savvy

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 Video Proficient

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# Compatibility

The Compatibility score reflects the alignment between the requirements of your selling role and those with which Maya indicated having the most experience and past success. This is different from our Client Criteria, which check for the existence of specific skills and strengths necessary for success in your selling role.

<input checked="" type="radio"/>	Primary Market	Residential
<input checked="" type="radio"/>	Primary Market	Small business/professional
<input checked="" type="radio"/>	Prospects by Title	Consumers
<input type="radio"/>	Resistance	No resistance
<input type="radio"/>	Resistance	Moderate resistance
<input type="radio"/>	Competition	Occasional competition
<input checked="" type="radio"/>	Pricing	We are usually competitive
<input checked="" type="radio"/>	Average Order	\$US1,000 - \$US25,000



Product Sold

Conceptual services



Sales Cycle

Two to three calls



Customer Development

Sell them and service them



Priorities

Hunting required



Closing

Salesperson will do the closing



Presentations

Multiple times to individuals



Product Quality

Top of the line



Pressure

Medium



Supervision

Closely managed



Company

Small professional firm



Compensation

All salary



Selling Environment

Rapid growth and expansion



Location

Out of my office or one staffed by a sales manager



Entrepreneurial

Have an Entrepreneurial Mindset



Selling Methods

Face to Face



Channel

Directly to the Customer / Client



Decision Factor

are buying what we sell but must choose from whom to buy (Why me?)



Networking

Both Social Selling AND Traditional Networking



Leads

We don't provide any - they need to prospect

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We hope this analysis has given you useful insights into this individual's current sales-related skills and strengths – both the areas where they are already strongly competent as well as any areas in which they could benefit from training and development.