

SALES TEAM ASSESSMENT





In Reference To:

Abc Sample Co.

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Congratulations on your decision to step up the focus on your organization's sales power. The attached assessment will summarize some of the most important findings we discovered about the level of effectiveness of your sales organization.

Before reviewing the findings, ask yourself the following:


- Where do we really need help as a sales organization?
- How much more effective can we be with some changes?
- Do we have the right people in place to fulfil our goals?
- If we are falling short, what are the real reasons?

As you read through the following information, Remember the definition of insanity is doing the same thing over and over and expecting different results.

What's next?

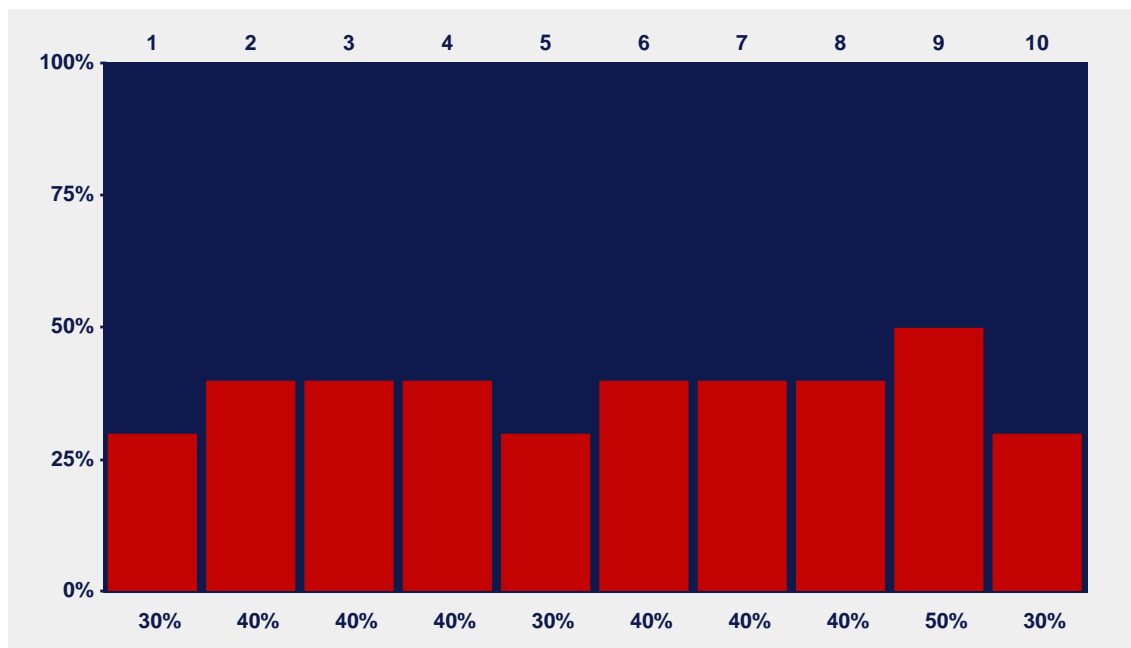
You may decide that your salespeople should take individual assessments to understand each of their underlying issues before you decide to spend time on training them. I would suggest this next step to understand where some of the issues lay and what to do about them.

Good selling.



SalesHiringMetrics.com

NO	CATEGORY	RESULTS	RATINGS
1	Leadership	Ideal 9 current 6	30%
2	Hiring and Recruiting	Ideal 8 current 4	40%
3	Prospecting	Ideal 10 current 6	40%
4	Accountability and Responsibility	Ideal 8 current 4	40%
5	Forecasting	Ideal 7 current 4	30%
6	Goals	Ideal 9 current 5	40%
7	Passion and Commitment	Ideal 10 current 6	40%
8	Up-Selling or Cross-Selling	Ideal 9 current 5	40%
9	Training	Ideal 9 current 4	50%
10	Sales Process	Ideal 8 current 5	30%



1. Leadership

"The pessimist complains about the wind. The optimist expects it to change. The leader adjusts the sails." John Maxwell

Leadership and management are often misunderstood as one and the same. They are not! Certainly, good sales leaders should be able to manage and vice-versa. But, it is important to understand the difference. Both are important to the success of an organization. The key difference between the two is that management is about processes and leadership is about people. For example, you manage your accounts payables but you lead people as your accounts-payable administrator. Understanding this is the key to motivating, coaching and growing your people to the very best of their ability. Unfortunately, we learn management skills very early on when we should be developing leadership skills. Most of our parents told us what to do as opposed to teaching us to think of the answer to questions on our own. This happens in sales organizations since this is how we'd have been taught. Hiring a leader in the organization is so often done wrong. One of the most common reasons for promotion is the length of service. The person who becomes the next manager is often the one who has worked at the company the longest. The other reason for promotion is that the salesperson has the strongest sales record. They become the sales manager even though there are different characteristics that a leader and an achieving salesperson possess. Leadership is about effecting positive change in the organization by recognizing and correcting problems in the sales process as well as teaching others how to implement positive changes.

Organization Results

Your organization seems to have some problem differentiating between management and leadership. When your organization's management team is leading properly, your salespeople typically know when to consult management, and when to decide for themselves. Often times your salespeople know the correct answer and will give it because they have been conditioned to take charge when the time is right. The bigger issue here is the fact that empowerment and self-reliance need to be taught. One of the most important leadership qualities your sales leader needs to learn is growing the salesperson to their potential, to be the best that they can be and understanding each person's true motivation.

2. Hiring and Recruiting

The ability to attract and retain the best employees is imperative in the success of an organization. Recruitment should be an ongoing process and your company should never be dormant and wait until there is a need and there is always a need for someone better than your best person, isn't there?

Proper hiring should include these 5 steps;

1. Identifying what an ideal candidate actually looks like in your organization. The first step in understanding how to hire the person that best fits YOUR organization is based on criteria that matters only to you. The ability to create a benchmark that each candidate is measured by is the first step in hiring properly.
2. Searching for the proper candidate. The ability to hire that correct match for your organization is based on creating the Benchmark that best fits your sales organization then "match" that candidate with the criteria you have created. This can and should be done for different types of positions.
3. Pre-qualifying the candidate is not to waste time with the wrong ones. Having a phone interview will give you a good feel for how they interact. The reason this is done only after the bench-matching is we often hear something we like and minimize the importance of the actual match to your organization.
4. Assessing the candidate with the proper tools to eliminate pure subjectivity in hiring. Understanding their actual skills and more importantly their beliefs when it comes to selling is what the sales assessment addresses. Not only will this assessment give you information on how they sell but more importantly will they sell and what will hold them back. You will also need a list of appropriate questions based on their results, to ask if necessary to help make your decision.
5. In-person interview. The last interview, of course, is the in-person meeting. At this point, you are looking for things like; eye-contact, physical stance and any other body-language that will help you make your final decision. It is also recommended to have a few people, at least 2, in the organization, conduct the interview.

Organization Results

Your organization doesn't have a consistent process for hiring and recruiting that will have a predictable outcome to bring a steady stream of sales talent.

Common outcomes when this weakness appears;

- 1 You hire in desperation which typically leads to a high level of turnover or mediocre sales results.
- 2 You hire a salesperson who performs their best sales job in the interview and we wonder for months and often longer why we don't see success because we "know" they can sell.
- 3 You promote from inside the organization someone who has the vast product knowledge and don't realize that sales is not about the level of product knowledge someone has.

3. Prospecting

Prospecting is the ability and/or willingness to keep the prospect funnel full with potential business. Often sales organizations fall into the "prospecting when necessary" syndrome. This translates into the sales force prospecting only when their available pool of potential new business clients begin to dwindle. The problem here is two-fold.

The first issue with sporadic prospecting is the creation of the dreaded "desperate salesperson." Think about it. If your salespeople are only prospecting when they "need" business, they tend to become desperate, and this desperation will be obvious to the potential client. Prospects sense it nearly every time. This desperation is greatly diminishing the ability of your salespeople to be in control of their sales calls if not eliminating the ability completely. Closing the sale then becomes extremely difficult because your salesperson is coming from a place of weakness.

The other issue with infrequent prospecting is the presence of "roller-coaster" sales months. This tends to happen when a month of hard prospecting leads to new business, reflecting in the numbers the following month. However, when the "backend" work of starting a new client keeps your salesperson from prospecting the next month, it too will show in the numbers. Hence, the sales roller-coaster terminology.

It's a common misconception that prospecting is just cold calling. Nothing could be farther from the truth. Prospecting is a combination of several activities that lead to new prospects. Your sales force should know that their prospecting goal isn't necessary to close on the first call but to qualify potential clients and begin building relationships. This qualification process will help them to separate "suspect" from true prospects.

Organization Results

Your organization seems to be erratic with the process of how to prospect for new business, which should be evident by your companies' prospecting funnel. Having a process of consistent prospecting and being able to close on those qualified leads that make the difference between a good sales organization and a great one. Having a process that can be tracked is the #1 most important aspect of revenue income and consistency in growth.

Your sales force as a whole presently doesn't seem to have the ability to understand the difference between a "suspect" and a "true prospect," which could result in wasting time working on the unqualified business. Because of this, the closing ratios amongst your salespeople will be high and the number of rejections they will face will be low, encouraging them to continue prospecting as effectively.

4. Accountability and Responsibility

"It's hard to be aggressive when you're confused." - Football coach Vince Lombardi.

Accountability. Create a clear and detailed written plan that involves a 30-60-90 day written goal. This will not only involve revenue goals but activity goals as well. Activity goals are the action steps that are taken to prospect daily, weekly, and monthly.

There are a few important reasons for creating and tracking activities and accountability.

1. Holding your salespeople accountable for results creates urgency, focus, and positive pressure to perform. Human nature shows us that having a clear picture or vision gives us a more positive result with something to shoot for. When everyone knows expectations, it gives a direction to follow and makes measuring progress easier.
2. The ability to achieve is a direct result of knowing what achievement is. A leader will be hesitant to hold others accountable when they know that they really never laid out what success is and the proper steps to get there. The result? Keeping a salesperson employed too long because there is no real clear-cut reason to let them go. It's hard to tell them they aren't "cutting it" if you never defined what "cutting it" is.

When you create a vague performance standard like, "we expect you to work your hardest," you guarantee cloudy and convenient interpretations. With clear expectations should come clear consequences. Some feel that by having such stringent standards for accountability, you are actually declaring a baseline for performance under which you are unwilling to compromise. However, that's not the case.

Responsibility is defined as a person's "response-ability," that is, the ability of a person to maturely respond to the various challenges and circumstances of life. Responsibility is important because it provides a sense of purpose, in addition to building resilience amidst adversity on an individual and societal level. Like an addiction, sidestepping responsibility may feel good in the short-term, but leads to exponentially worse pain and suffering in the long term.

In business, we need to deal with what is controllable. We take the necessary steps we need to take to be successful, etc. In sales, it's the same. Some people believe that sales are "a personality business," they don't look at what activities are actually controllable by the salesperson.

Organization Results

Your organization seems to have an inability in holding your salespeople accountable when it comes to daily, weekly and/or monthly activities. The ability to track accountability is creating clear expectation and holding salespeople to that standard. Being held accountable for results also creates urgency, focus, and positive pressure to perform. Success will be determined not only by creating accountabilities but making each responsible for them.

5. Forecasting

A sales forecast is an estimate of sales (in dollars or units) that an individual firm expects to achieve during a specific time period, in a stated market and under a proposed marketing plan.

Like any kind of challenge, you have a distinct advantage when you can tap good and reliable intelligence. Here's the problem: If your salespeople don't get enough accurate intelligence about their prospects. As a result, their pipelines are filled with flaky opportunities. And often your sales managers don't have enough guts to call them out on it. Here's the litmus test: When your salespeople submit their forecasts, do you or your managers "adjust" them down for realism? It's typically easier for salespeople and their managers to discuss why they didn't win business, instead of asking themselves the right questions before going to battle.

Good sales forecasts are vital to providing good customer service. When demand can be predicted accurately, it can be met in a timely manner, keeping all departments, partners and ultimately customers satisfied. Accurate forecasts assist organizations to avoid lost sales or stock-out situations by using preparation, therefore, prevent customers from going to competitors.

Accurate forecasts can also improve a company's profits by enabling the firm to more accurately plan its purchases.

There are several ways to develop a sales forecast. One of the most popular techniques is taking the composite of sales force opinion. Here, the individual sales representatives and/or their sales managers are asked to predict their sales for the upcoming month and year. These individual predictions are aggregated to develop the company's sales forecast. With this method, a monthly or quarterly update will adjust the forecast for more precision throughout the year. This can be very costly to your organization.

Organization Results

It seems that your organization has an inconsistent technique to forecast sales revenues that is effective at predicting what sales (and in-turn, revenue) will come in. The result of this will directly affect your ability to make important decisions for your business. Without this information being predictable, you will be literally guessing at your business future.

6. Goal

To be successful, it is imperative to have long term as well as short term goals. What do we truly want and more importantly, how will we get there? Goal setting involves specific, objectives. Setting goals, both individual and business sales is an effective tool for making progress by ensuring that everyone in the organization is clearly aware of what is expected from them. To be most effective, goals should be tangible, specific, realistic, and have a time target for completion.

When setting individual sales goals, focus on breaking your aspirations up into short-term and long-term objectives. A short-term goal may be to call on 8 new prospects a week, whereas a long-term goal may be to gross a half a million dollars in revenue this year. It's important that when you're developing your goals, you set them high enough so you have to work hard to achieve them, but realistic enough so they aren't unreasonable and unable to reach. Attaining sales team goals involves long-term awareness, strength, and concentration. Excuses for poor performance and inadequate planning only show a lack of emotional maturity. Having measurable goals removes this from the equation.

Organization Results

Your sales organization has several issues with goal setting, which ultimately indicates your company's success. With specific goals and a road map to reach them, it will be easy for the organization to achieve high expectations. Therefore, reasons for not closing business are always known and analyzed therefore the blame game rarely comes into play.

Additionally, your team has problems when it comes to getting burnt out from working hard and not smart, a very important contributor to happy and long-term employees.

7. Passion and Commitment

Passion and Commitment is the willingness to do whatever it takes. Success is the ultimate payoff. The goal is always within reach and if it's difficult, the salesperson that possesses these qualities, will figure out how to get there. If someone has the passion to be successful and is dedicated to doing what it takes to achieve their goals, the likelihood of achieving them is very high.

Commitment is the number one ingredient that turns a salesperson from good to great. It is the fire-in-the-belly hunger that drives salespeople to greatness. If you find someone who truly has the attribute of commitment, hire them on the spot.

Personal responsibility is closely connected with the character of a person when the character is defined as someone's moral or ethical qualities. Without commitment, a person tends to blame others for circumstances and is not able to consciously and purposefully choose his or her own thoughts, feelings and actions. This person often sees themselves as a victim. Victims typically identify themselves based upon attributes of powerlessness, dependency, entitlement, apathy, fear, self-doubt, and the like. It is difficult than to create and follow true direction and destiny.

Organization Results

Your sales organization is not willing to do whatever it takes to meet your goals and "whatever it takes" to create opportunities for continued success. even when things get tough.

Additionally your sales team seems are very uncomfortable doing things that are out of their comfort zone, often not taking on a challenge if given the opportunity. In other words staying in the "comfort zone".

8. Up-Selling and Cross-Selling

The building of relationships is a very important aspect of selling. We build relationships with our prospects so that they trust us enough to buy from us. We build relationships with our clients so that they continue to buy from us even if you are faced with stiff competition. We also build relationships so that we are referred to others and our company grows successfully.

Both up-selling and cross-selling are products of relationship building. When we talk about up-selling and cross-selling, there is a pretty straight forward, shared definition. When we discuss the selling of additional products or services to a client or customer and selling a premium product or service.

Up-selling is when the salesperson attempts to have the customer purchase a more expensive product in an attempt to make a larger profit and of course, do right for the prospect as well. Cross-selling is the sale of additional items to a customer. Often times these additional products suggested are ones that work well with the initial product sold. In some cases, these sales occur with existing clients, and other times they occur at the time of the initial purchase. Either way, relationships, and trust are the main ingredients for success in both up and cross-selling.

Once someone has decided to buy, they have made the decision that the purchase is correct. People love to buy, they just hate being sold. That being said, if a prospect feels the additional sale is an enhancement, they will agree upon the purchase. This happens when a relationship of trust is built as well as a true understanding of the customers true needs.

Organization Results

Your organization seems to have no real ability to cross-sell additional products and services or upselling existing products. Whether or not cross-selling is an important part of your company's sales, it is also directly related to getting referrals from existing clients. Whether your particular product can be upsold or you do not have a true need to cross-sell, every company will be more successful with referrals.

9. Training

"To have growth in products, you need to have growth in people" - S. Reinemund, CEO PepsiCo. Inc.

Most organizations believe, at least at some level, that training is important. Additionally, most organizations believe that they have training in place. Typically, when they say they have had training they are referring to product and/or service training. Product training is the training of how the actual product works. Though it is important to understand this information, we tend to spend lots of time learning the ins and outs of product knowledge but not much time on how we take it successfully to market. Often sales people believe that "presenting the "features and benefits" of the product and showing the knowledge of their product will sell it. This is only one part of the process and if I told you it was the least important of the process, and you may disagree, but there is so much more than the features of the product and the benefit is only appropriate when you know this prospects benefits. This happens by creating excellent thought-provoking, open-ended questions and not pitching the product or service.

The other and most important part of the process is the ability to ask the right questions to get your prospects to "self-realize" that your product or service is a fit for them in addition to other steps in a successful process. This is not a natural way to approach selling; therefore, training is an essential part of success in a sales organization. Often organizations overlook their greatest potential source of power - the power to increase sales performance by developing their people, not their product knowledge.

Organization Results

Your organization does not have a process when it comes to training and the on-going growth and development of your sales team. What you should be seeing is each salesperson having a similar sales process. The real advantage of this is that your sales leader has the ability to appropriately coach each individual using a process. Though each person has their own personality and their own style, a consistent process helps keep the entire sales organization on-track and adds the ability to forecast and coach for continual success.

Presently your team is having difficulty achieving most of these benchmarks and this will really show itself in revenue gain for you.

10. Sales Process

Lack of a sales process means that there is no real plan when approaching, speaking, meeting or working with a potential client. A great number of salespeople feel that having a process is not necessary. They assume that their personality and getting the prospect to like them and pitching features and benefits is all that it will take to close the sale. Years ago, that may have been true. Today, we are in a much more sophisticated and faster paced sales environment. Yes, relationship building is an essential part of getting and closing business, but there is much more involved than just liking your salesperson.

It is imperative to understand and use a process when selling. A process will not only help you close more business, but better, more appropriate business. Selling cycles can be long because we often allow them to be.

Having a process for doing business is taking control of the sales interview, not the prospect dictating how it will work. A successful sales system is really a better, up front and honest communication process. There are typically steps involved in this process. The steps are merely guidelines for you to inject your own personality and style. Obviously, referrals are the best way to get business. Most people approach referrals as a reactive condition. In other words, if it happens then they follow up on it. It is important to establish a process for getting more referrals proactively, so you can count on them as a part of your overall strategy.

A sales process is important to establish because it allows you to be in control, as well as set realistic goals and achieve them, and you always know what's next in the process when you're with a prospect or client.

Organization Results

Your organization sometimes has a problem employing a sales process when selling to a prospect. A process consists of things like getting past the gate keeper, turning introductions into appointments, consistently getting to the "real issue," and having a clear next step for the salesperson and prospect. If your company is able to utilize a sales process, your team never worries about falling into the "let me think it over" cycle. Your sales team should never feel compelled to give free consulting. Spending unnecessary time putting together elaborate proposals or presentations that may not result in sales is time consuming and therefore expensive.