

# SALES LEADER ASSESSMENT





In Reference To:

**John Jones**

**Abc Sample Co.**

**[jessieclayjp@gmail.com](mailto:jessieclayjp@gmail.com)**

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Thank you for utilizing our Sales Leader's Assessment. Before you read the evaluation, I would like to discuss a few concepts;

First, I would like you to remember how this assessment is to be used. The primary purpose is to give a good overview of the candidate's weaknesses and strengths. Please use as an informational tool and not as the ultimate decision-maker in hiring or not hiring. If you see a weakness, use this information to ask additional questions about situations that will include the subject of the weakness.


Ex- "In a situation like..., what would you do and why?"

Second, there are a few different sections that will help you determine if this candidate is a fit for your organization. The results of this assessment have different parts. The section on Time Management will tell you the percentage of time that the most successful sales leaders utilize. Please review this section and if you have a reason that your organization requires a different time management breakdown, then take note of that.

Third, there is an open section that we asked your candidate the question, "What makes you the best person for this position?" Read this in a few ways; what they say first is often what they deem there most important strength. If that is not what you deem is most important, ask about that. Are they talking about things that build business or that lead salespeople? Ask about those. Make sure you hear what you need in this candidate.

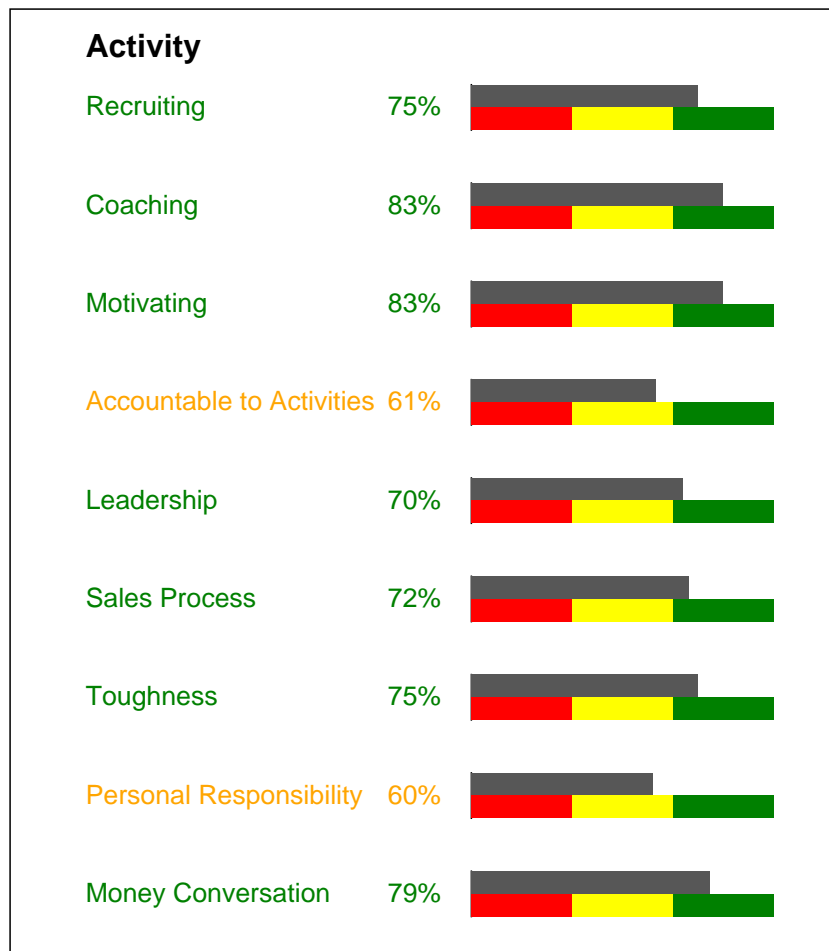
A warning, please don't fall for a smooth-talker or a great resume! Your gut is helpful but these tools will help bring up issues that you may not see in an interview alone!

Thanks, and Good Selling!



SalesHiringMetrics.com

NO	CATEGORY	RESULTS	RATINGS
1	Recruiting	24 out of 32	75%
2	Coaching	60 out of 72	83%
3	Motivating	40 out of 48	83%
4	Accountability/Activities	44 out of 72	61%
5	Leadership	28 out of 40	70%
6	Process	46 out of 64	72%
7	Toughness	36 out of 48	75%
8	Personal Responsibility	24 out of 40	60%
9	Money Conversation	38 out of 48	79%



## **1. Recruiting**

Deciding on a candidate is one of the most important decision you will make and should be based on a variety of things. Your gut is of course helpful but your "gut" is based on emotion, which is no way to make a large decision like this. 'Hire Slow, Fire Fast' is a motto to be taken seriously. It is crucial to have the right salespeople in the right roles, have more A and less B players instead of mostly 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, John's ability to effectively recruit salespeople is not strong enough.

The 5 steps that will help in hiring right the first time.

### **1. Benchmarking**

The first step in understanding how to hire the person that best fits YOUR organization that is based on criteria that matter only to your organization. The ability to create a base that each candidate is measured by is the first step in hiring properly.

### **2. Bench-matching**

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 sales positions.

### **3. The Short Phone Interview**

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. There are 2 ways to conduct the phone interview; Having a specific role-play with the candidate that you will prepare for them ahead of time by giving them a bit of background to see how they handle a sales situation. You are looking for the observation of information based on any 'homework' they may have done, the ability to ask questions and not just 'pitch' and finally and most importantly the confidence that comes across in the conversation.

Using a very specific list of questions that create a similar initial phone conversation that they will encounter in your organization when it comes to the first call they will make to a prospect, you will be given a list of questions and a framework in which to ask them. You are looking for an ability to handle quick, often negative reaction coming to them from a prospect and how they handle the prospect while not being 'agreeable' as most will not be. You are looking for confidence and a quick recovery of a sometimes- uncomfortable conversation.

### **4. The Sales Talent Assessment**

Understanding their actual skills and more importantly their beliefs when it comes to selling is

what the sales talent 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 be given a list of appropriate questions based on their results to ask if necessary to help make your decision.

## **5. The 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.

## **2. Coaching**

Coaching is the key to helping your salespeople improve and generate more revenue. John's current sales coaching skills seem to be as effective as they should be. The most important job is to grow and groom salespeople as well as keep them accountable. There is not one way to accomplish this but doing it is the most significant reason for sales growth.

Coaching is truly how to become a leader and not just a manager. When you think of a coach we most often think of a great athletic coach. The coach runs practices with them to include drills, games and observes their performance to give them feedback on improvement.

Coaching is not playing games for them or running drills for them, even if they are a stronger player, as tempting as that might be. The coaches' true job is to teach how to perform best, practice with them through role-play, confirm what they need to change and how with consistent feedback. A coach is NOT to sell for them or rescue them to save the sale. The better the coach, the better your team, bar none.

## **3. 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, create more effort, push through their comfort zone or help support a goal is more important than ever. John ability to motivate salespeople in this way has some room for improvement.

Some salespeople need admiration, some need to be independent and others need a true plan and help following it. Every salesperson is motivated differently. One of the biggest mistakes we make is assuming everyone is motivated the same as we are. Another is assuming money is a motivator. What money can bring each team member can certainly be a motivator but a leader MUST first understand what that is.

Motivators can be things (a car, new home, a vacation) or can be a feeling or emotion like public recognition, appreciation like an award or even the security of what actual money can give you like early retirement, a growing bank account and emergency fund or paying off bills. Each of these are and can be motivators but we cannot assume any of them are until we find out.

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. Additionally, the ability to have a trustworthy forecast for business planning is directly related to accountability. The ability John has to hold salespeople accountable to these metrics is high.

## **4. Accountable to Activities**

***Football coach Vince Lombardi once said, "It's hard to be aggressive when you're confused."***

Holding your people accountable for results creates urgency, focus, and a 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 your expectations, it gives a direction to follow and makes measuring progress easier.

The ability to achieve is a direct result of knowing what achievement is. Typically, we are hesitant to hold others accountable when we know deep down that we really never laid out what success is and the steps to get there. The result? Keeping an employee 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, for example, "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 benchmark for performance under which you are unwilling to compromise. However, that's not the case.

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. Because some people believe that sales is "a personality business," they don't look at what is controllable.

It is imperative that management understands what each salesperson is doing every day, every week, every month. This is something that needs to be set early on to create accountability and have a means of tracking more than just success and failures. Activities are more important to track for leaders to truly understand where the issues are. Success can be tracked by understanding what is working and what isn't. This is the basic and most important reason for accountability. Salespeople can be held accountable for the activities they do, the result of those activities are the closing of the sale, or not, but a leader will have information to coach successfully. Being held accountable for results also creates urgency and focus with positive pressure to perform. John needs some improvement in creating true accountability for the team.

## **5. 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. You can 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 the sales organization since this is how we 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 a 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.

John seems to have a few challenges differentiating between management and leadership. When your organization's management team is leading properly, your people are typically consulting management before they make important decisions or truly understand when they can make a decision on their own.

## **6. Sales Process**

The most important part of the sales 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 the other steps in a successful process. This is not a natural way to approach selling; therefore, training through a sales process is an essential part of success in a sales organization.

John seems to have some understanding when it comes to creating and utilizing a sales training process and the on-going growth and development of a sales team. You should be seeing each salesperson having a similar sales process with of course their own style incorporated. The real advantage of this is that your sales leader has the ability to appropriately coach each individual using the same 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.

Often organizations overlook their greatest potential source of power - the power to increase sales



performance by developing their people, not their product knowledge.

## **7. Toughness**

A leader shows their confidence level through mental toughness. Confidence is one of the most important aspects of being successful in sales. Often a person is attracted to sales because they see themselves as a "people person." We can fall for this trait and ultimately not understand why this person seems to be busy with appointments but have very few accounts actually closing. The charismatic leader has the ability to say and do what you need to, even if it is uncomfortable, is one of the most important aspects of being a professional sales leader.

John needs some improvement when it comes to mental toughness which will not allow misunderstandings to occur without addressing them. This skill will push the salesperson to do and ask all that they need to in order to reach a positive outcome (and remember, a 'no' can be a good thing). With bravery and toughness, the sales leader will be able to hold salespeople accountable even when it is hard to.

## **8. Personal Responsibility**

Personal 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.

Personal responsibility is also closely connected with character, when character is defined as a person's moral or ethical quality, and the character of a person gives them advantages to respond to daily challenges. John will sometimes allow team members to play the "victim" and use excuses in situations that didn't go the way they wanted. A strong leader won't allow excuses for things and will typically look at themselves to find a better way which will teach team members the same.

When personal responsibility is low, a person tends to blame others for circumstances, and are not able to consciously and purposefully verbalize his or her own thoughts, feelings and actions. When a leader is guilty of not taking true personal responsibility for themselves, they will allow excuses to be made by others. Victims typically identify themselves based upon attributes of powerlessness, dependency, entitlement, apathy, fear, self-doubt, and the like. It is difficult then to create and follow true direction and destiny so without your leader taking true personal responsibility, the excuses will run ramped.

## **9. Money Conversation**

The ability to talk about money, (pricing, cost and investment) is not only important to show confidence to the prospect but also to additionally qualify the prospect to make sure they actually are a true prospect. One of the reasons salespeople have to negotiate pricing and have a lengthened selling cycle is often directly related to not having a money conversation early enough in the process.

John is comfortable with the conversation involving money. In turn this will affect the team in the

same way. Prospects themselves don't often encourage the budget conversation; either they are used to or are typically more comfortable with waiting until the proposal is sent to see what the price range will be. If there is no early conversation about money and it is only brought up at the very end, the prospect has much more negotiation power than the salesperson.

### **Why am I best for this position:**

I have been in sales management for several years. Salespeople really like and respect me. I enjoy helping my team do the best that they can.

NO	Area of Activity	Your Time %	Ideal Time %
1	Recruiting	25%	22%
2	Coaching Salespeople in-field/in-office	10%	37%
3	Motivating; Contests/Sales meetings	5%	12%
4	Measuring accountability/activates/CRM)	10%	10%
5	Internal Company issues	10%	5%
6	Planning; Calendar/ Organization/Paperwork	5%	3%
7	Business/Product Strategy	10%	3%
8	Direct Selling (Yourself)	15%	5%
9	*Other	10%	3%

**More than 5% on 'other',**

deal with internal issues

## **Management vs Leadership**

Sales managers often have an inverted view of what real leadership is as opposed to management. The proverbial sales management trap where instead of managing people we tend to manage everything else instead. Ultimately, only salespeople can bring in the business while paperwork, phone, computer, desk and firefighting contribute very little. Priorities should be realigned as follows;

## **Time Management**

We asked (name) to tell us what percentage of your time is spent in 9 areas of sales management. Then we compared the answers to the ideal distribution of time based on current sales management best practices.

**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, the ability to effectively recruit salespeople is one of the most powerful and important tools to have a superstar team. Spending optimal time recruiting should typically be approximately 20% of their time.

**Coaching** - Coaching is the key to helping your salespeople improve and generate more revenue. Sales coaching skills are one of the reasons salespeople give to remain at a company and feel a part of the team. The most important job is to grow and groom salespeople as well as keep them accountable. There is not one way to accomplish this but doing it is the #1 reason for sales growth. Optimal time to spend coaching in an office or out of the field should be approximately 35% of their time.

**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, create more effort, push through their comfort zone or help support a goal is more important than ever. A leader's ability to motivate salespeople in this way has. The type of motivational activities are contests, sales meetings, bonuses etc. Should be at least 10% of their time.

**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. Additionally, the ability to have a trustable forecast for business planning is directly related to accountability. The ability to hold salespeople accountable to these metrics is optimal at approximately 10% of their time.

The rest of the categories combined should be no more than 20% of the total.