



Objective
Management
Group®

SALES CANDIDATE ASSESSMENT.

MIKE RUTHERFORD

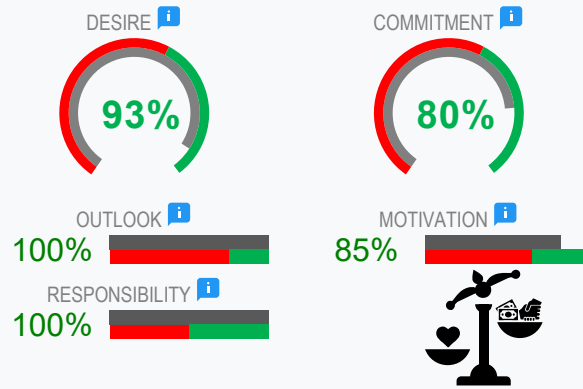
SEPTEMBER 23, 2020

ABC COMPANY
ABC SALES
MODERATE DIFFICULTY

RECOMMENDED

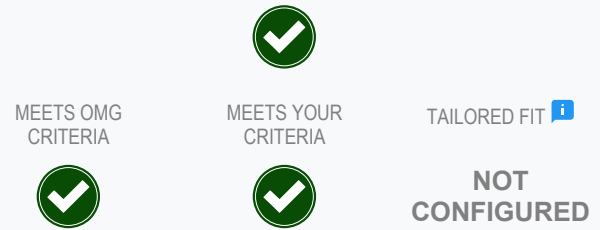
IDEAL RAMP-UP SKILLS

The Will to Sell Competencies

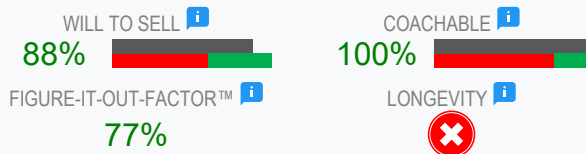


Recommendation for an Interview

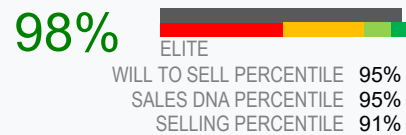
Recommended
Ideal Ramp-Up Skills



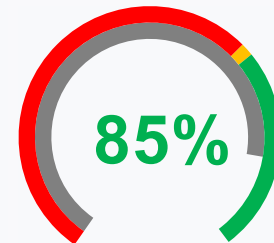
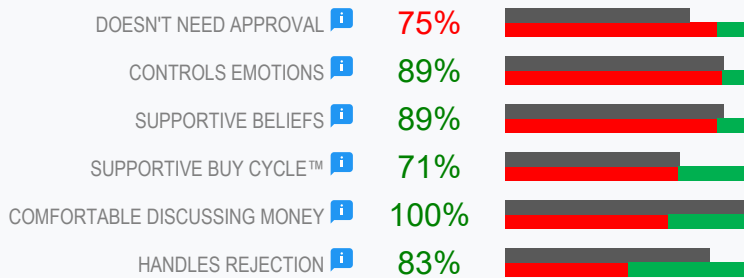
Development



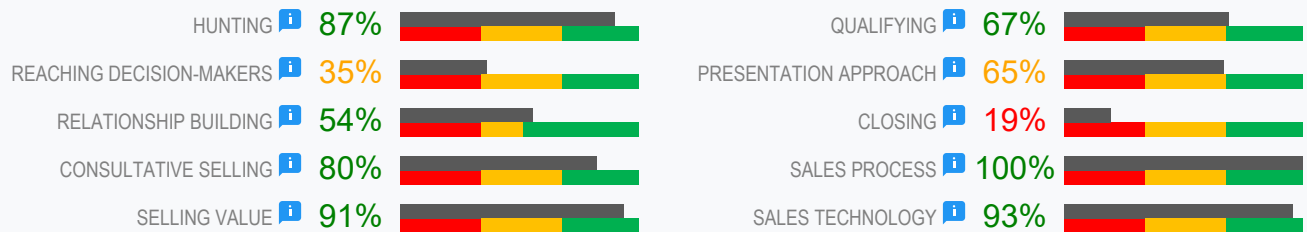
Sales Percentile™



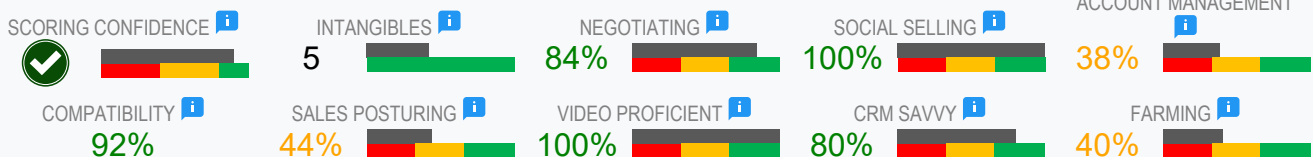
Sales DNA Competencies



Selling Competencies



Other Scores



This assessment focuses on the likelihood of Mike's sales success in this particular selling role at your company. We also suggest whether Mike has strong Will to Sell and is coachable, and provide guidance as to the areas in which Mike may require help during the onboarding process. While this is an important component of the selection process, it is only one component. This assessment does not measure intelligence, technical knowledge, self-presentation, or appearance. This is not a personality test or a behavioral styles assessment. While assessments of that nature are perfectly well designed for general employment purposes, they are not predictive of sales success and we do not recommend their use in the sales selection process. Our assessment will uncover sales issues that were likely hidden from view, even in a fairly comprehensive series of interviews. Therefore, our recommendations should be considered accordingly. Explanations for most of our findings can be found by clicking on the camera icons on the previous page.

DO WE RECOMMEND YOU INTERVIEW MIKE?

Mike is recommended for an interview because Mike 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 Mike is willing to overcome the need for approval.

Requirements

Meets OMG Criteria	
Will to Sell	
Meets minimum Sales DNA of 68% for difficulty level	
Meets Your Criteria	
Value seller	
Will hunt for new business	
Entrepreneurial seller	
Recommendation for an Interview	

Intangibles

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

Intangible

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

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HOW CONFIDENT ARE WE IN OUR RECOMMENDATION?

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

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

High Confidence



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

Among the assessment questions, we have identified one set of inconsistent answers. We have included questions related to this in the interviewing tips section of this assessment.

WHAT IS THE LONGEVITY PREDICTION FOR THIS CANDIDATE?

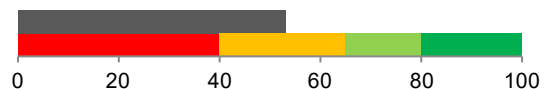
Today, turnover is inevitable and when you consider the unique dynamic of the odds of a salesperson succeeding, the risk of expensive turnover increases dramatically. It is important for a company to know its New Salesperson Return on Investment (NSROI). NSROI answers the question of how long a new salesperson must remain with a company in order for the investment of time and money to produce an acceptable return and for the salesperson to have an impact.

When you completed the Role Specification for this assessment you provided the Ramp Up, Margin and Subsidy information needed to calculate the NSROI for this position. The results are shown in the table below.

	Default Values	This Candidate
Ramp Up Time	1 year 2 months	1 year 2 months
Break Even	2 years 3 months	2 years 3 months
NSROI (5x)	7 years 8 months	7 years 8 months

The reason that the candidate's ramp up, break even and NSROI durations are similar to the default values is that this candidate has a Figure-It-Out Factor™ within our expectations for a typical learning curve.

Unlikely



Five factors contribute to our longevity prediction. Each factor supports or detracts from the likelihood that a candidate will stay long enough to make the NSROI timeframe. Below is a description of how each of those factors contributes to the overall longevity prediction.

- The candidate's Ramp-Up Skills are within the range that supports longevity.
- The Sales Percentile is well outside the range that supports longevity.
- The candidate's years in sales are in the range that supports longevity.
- Your profile calls for closely managing the salesperson which supports longevity.
- Your compensation plan does not support longevity.

WHAT SHOULD YOU ASK MIKE DURING THE INTERVIEW?

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.

Ask if Mike 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.

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

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

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

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

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

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

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

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?

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 Mike.

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

HOW COMFORTABLE IS MIKE WITH YOUR SALES ENVIRONMENT?

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

92%

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

Primary Market

- i Corporate/Industrial
- ✓ Residential
- ✓ Small business/professional
- i Institutional

Prospects by Title

- i Ownership or C Level
- i Management Level
- i Business Users
- ✓ Consumers

Resistance

- ✗ No resistance
- i Very little resistance
- ✗ Moderate resistance
- ✗ Lots of resistance

Competition

- i Tremendous Competition
- Regular competition
- ✗ Occasional competition
- We are the only game in town

Pricing

- i We are usually higher
- ✓ We are usually competitive
- i We are usually lower

Average Order

- i Under \$US1,000
- ✓ \$US1,000 - \$US25,000
- i \$US25,000 - \$US250,000
- i Over \$US250,000

Product Sold

- i Custom engineered solutions
- ✓ Conceptual services
- i Products we can demonstrate
- i Commodities

Sales Cycle

- i A one call close
- ✓ Two to three calls
- i 3-6 months
- More than 6 months

Customer Development

- i Sell them and move on
- i Sell them on a regular basis
- i Sell them and renew yearly
- ✓ Sell them and service them

Priorities

- ✓ Hunting required
- i Mostly hunting
- i Some hunting required
- i No hunting

Closing

- ✓ Salesperson will do the closing
- Salesperson will plant seeds
- Inside people do the closing
- Someone else does the closing

Presentations

- i Once to a single decision maker
- i Once to a group
- ✓ Multiple times to individuals
- i Multiple times to a group

Product Quality

- ✓ Top of the line
- i Middle of the pack
- A little behind
- i Different

Pressure

- i High
- ✓ Medium
- i Low
- None

Supervision

- Micro managed
- Closely managed
- Seldom managed
- Not managed

Company

- Small professional firm
- Small to medium sized business
- Large business
- Major corporation

Compensation

- All salary
- Straight commission
- Mostly salary with some commission
- Mostly commission with some salary

Selling Environment

- Turbulent and ever changing
- Downsizing and turnover
- Rapid growth and expansion
- Very calm and stable

Location

- Out of my office or one staffed by a sales manager
- Out of a branch office without a sales manager
- Out of a remote or home office without staff

Entrepreneurial

- Have an Entrepreneurial Mindset
- Not Have an Entrepreneurial Mindset
- It does not matter

Selling Methods

- On the phone
- Face to Face
- At trade shows

Channel

- Directly to the Customer / Client
- Through someone who sells to our Customer / Client

Decision Factor

- are buying what we sell but must choose from whom to buy (Why me?)
- haven't planned to buy what we sell (Why?)

Networking

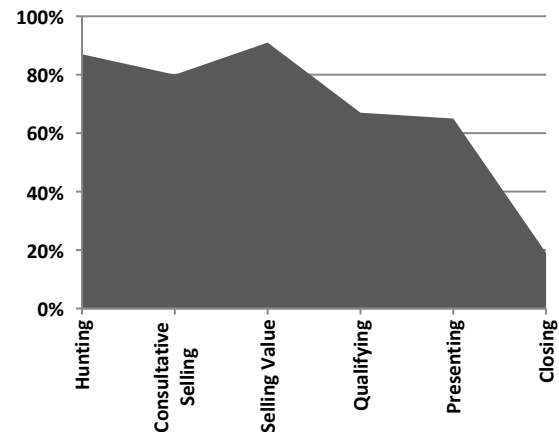
- Social Selling
- Traditional Networking
- Either of the above
- Social Selling AND Traditional Networking
- These skill sets are not required

Leads

- We provide all they need
- We provide some - they need to supplement
- We don't provide any - they need to prospect
- This is an account management position

WHAT ARE MIKE'S CURRENT SALES CAPABILITIES?

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



The graph tells a story that suggests the following capabilities:

Hunting - Mike has the attributes necessary for consistent, effective hunting.

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

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

Qualifying - Mike has the attributes for effective qualifying.

Presenting - Presentation skills are fair.

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

Selling Competencies

We looked at seven Competencies in all to determine the percentage of attributes in each:

- Hunting
- Consultative Selling
- Qualifying
- Closing
- Account Management
- Farming
- Sales Posturing

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

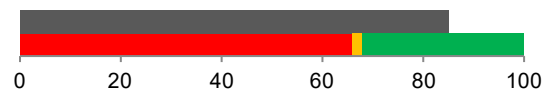
As we present our data-supported findings and continue answering these important questions, the Competencies will be a consistent part of those answers. While there is much more to sales and selling than skills - strategies and tactics - they do represent 50% of the equation. The other 50% is represented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

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

Sales DNA

As we mentioned earlier, sales skills are not the only factors that determine sales capabilities. The overall level of Sales DNA is even more important. When strong, Sales DNA supports a salesperson's ability to execute. Less than desirable Sales DNA hinders the ability to execute skills and process. Sales DNA includes all of Mike's selling-related strengths. Mike's Sales DNA Score, shown below, is comprised of six major strengths that have the greatest impact on sales call performance. Lower numbers represent Sales DNA that will impede a salesperson's performance.

85%



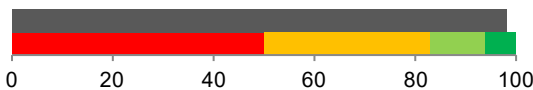
This score suggests that the Sales DNA will have a positive impact on sales effectiveness.

Sales Percentile™

Think of Sales Percentile™ as the overall score on this assessment. It represents a weighted combination of our Sales Core Competencies, expressed relative to the other salespeople we have assessed. A Sales Percentile™ of 90% means that 90% of salespeople we have assessed are weaker, and 10% are stronger.

Only 6% of all salespeople land in the top category – Elite. Another 11% appear in the next category – Strong. 33% of salespeople fall into the Serviceable category. The bottom 50% of salespeople are generally Weak.

98%



HOW MOTIVATED IS MIKE AND HOW CAN MIKE BE MOTIVATED?

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

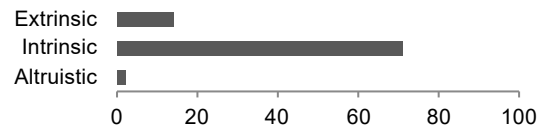
Intrinsics tend to be motivated by recognition, fulfillment, satisfaction, enjoyment, love of selling, mastery, or even when they have something to prove to others. They are often more consistent in a longer and more complex sales cycle.

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

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

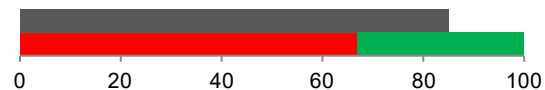
Mike's motivation style is:

Intrinsic



Mike's overall level of motivation is:

85%

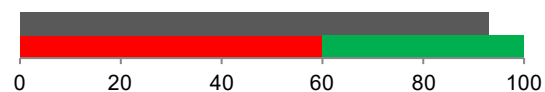


Mike may be driven by pride, satisfaction, mastery, achievement, competition, enjoyment, or recognition and could even be motivated to prove others wrong about what could be accomplished.

Desire

Strong Desire for greater sales success.

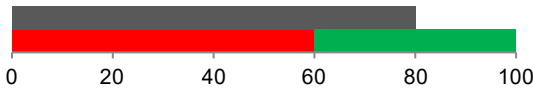
93%



Commitment

Strong Commitment towards greater sales success.

80%



Motivational Tendencies

Everyone responds differently to motivation so we thought you might find it useful to learn what Mike will respond to.

Mike prefers

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

Other Factors

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

Other Factors

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

5



Mike believes that I'm able to live comfortably on my current income

WILL MIKE GENERATE NEW BUSINESS?

The Hunting Competency contains the attributes required for successful development of new business. While the overall percentage in this Competency is meaningful, it is less important than certain individual attributes.

Specifically, it is important for salespeople to possess these attributes:

- Prospects Consistently
- Will Prospect
- Has No Need for Approval
- Recovers from Rejection
- Maintains a Full Pipeline

Not a Perfectionist - This may seem like a negative but in the case of hunting, some perfectionists seriously delay making calls until they believe the calls can be perfect.

The Hunting Competency

Will Prospect	✓
Prospects Consistently	✓
Prospects via Phone and / or Walk-ins	✓
Has No Need for Approval	✗
Schedules Meetings	✓
Recovers from Rejection	✓
Maintains Full Pipeline	✓
Not a Perfectionist or it Does Not Prevent Prospecting	✓
Likable	✗
Reaches Target Prospect	✓
Gets Referrals from Customers / Network	✓
Uses Social Selling Tools	✓
Attends Networking Events	✓
% of Attributes 85%	
Weighted Score 87%	

Summary

This is one of the few sales candidates who are both willing to prospect for new business and doing it consistently.

WILL MIKE REACH DECISION MAKERS?

We looked at a number of factors to determine whether Mike is meeting with decision makers and what, if anything, could interfere with that.

The Reaching Decision-Makers Competency

Calling on Actual Decision Maker	✘
Believes Speaking with Decision Makers Is Required	✔
Reaching Decision Maker Is Milestone in Sales Process	✔
Does Not Need to be Liked	✘
Comfortable with Targeted Decision Maker	✔
Doesn't Begin Sales Process with Buyers	✘
Uses Selling Skills to Reach Decision Maker	✔
	% of Attributes 57%
	Weighted Score 35%

Mike still has some room for improvement before mastering the ability to reach decision-makers, but some of the necessary strengths and skills are in place to support the approach. Over time, and when combined with other incremental improvements, developing the ability to achieve this milestone can shorten sales cycles, eliminate competition, increase win-rates and help identify the compelling reasons to buy. Advanced selling skills around strategy and tactics should help Mike reach decision makers more consistently.



Mike believes that I have to call on buyers before I can call on end users or decision-makers

WILL MIKE HAVE AN OPTIMIZED SALES CYCLE?

To answer this question we looked at 11 factors that historically support shorter sales cycles. These factors tend to prevent delayed closings and business lost to competitors. We present the 11 factors as they apply to Mike in the next table.

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

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

Factors

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

8

Summary

Mike has a moderate percentage of the 11 factors that support a shorter sales cycle.



Mike believes that
I need to educate my prospects

CAN MIKE SELL CONSULTATIVELY?

Consultative Selling

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

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

Consultative Selling is an approach that helps salespeople deal with the issues listed above. It is the most misunderstood term in all of sales with most people believing that a salesperson must ask questions, identify an issue and present a solution. This isn't entirely wrong, but it does fall short of the intended meaning, and most salespeople aren't actually selling this way. Instead, they have some prepared questions, ask some of them, and when a question leads to an issue, they begin to talk about a solution.

When Consultative Selling is properly executed it can help a salesperson differentiate, sell value, and sometimes be viewed as a Trusted Advisor. This can only occur after a salesperson has asked enough questions (dozens) to go as wide and deep as possible, leading to a discussion of issues, opportunities, implications, the people they affect, and potential outcomes. As much as consultative selling relies on highly developed questioning skills, equally well-developed listening skills are an even more important component.

The Consultative Selling Competency

Able to Stay in the Moment	✓
Uncovers Reasons to Buy	✓
Reasons to Buy Are Compelling	✓
Able to Listen/Ask with Ease	✓
Asks Enough Questions	✓
Asks Great Questions	✓
Gets Prospects Past "Nice to Have"	✓
Will Build Trust *	✗
Able to Ask Tough Questions	✗
Takes Nothing for Granted	✓
Appropriate Amount of Patience	✗
Understands How Prospects Will Buy	✓
Develops Strong Relationships **	✓
Presenting at Appropriate Times	✗
Healthy Skepticism	✗
% of Attributes 67%	
Weighted Score 80%	

* The following table provides additional detail regarding how well Mike builds trust.

The Building Trust Competency

Gains Trust Early	✗
High Integrity Seller	✗
Customers Share Information Early	✓
Gets First Call from Customers	✓
Quickly Develops Rapport	✗
Likable	✗
% of Attributes 33%	
Weighted Score 26%	

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

The Relationship Building Competency

Quickly Develops Rapport	✗
Relationship Is Key Factor in Winning Business	✗
Relationships Generate New Business	✓
Develops Strong Relationships over Time	✓
Customers Follow to New Companies	✓
Believes That Making Friends Is Single Greatest Asset	✗
Extroversion Supports Relationship Building	✓
% of Attributes 57%	
Weighted Score 54%	

Summary

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



Mike believes that
It's not OK to confront a prospect

WILL MIKE SELL VALUE?

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

- **Learns Why Prospects Will Buy** – A salesperson's ability to uncover a prospect's reasons to buy helps the salesperson discover the true value in the opportunity.
- **Focused on Value over Price** – When salespeople buy value rather than seek out the lowest price they are more likely to be effective at selling value. Salespeople who are price shoppers have the most difficulty upholding margins, creating and selling value, and competing against lower priced competitors.
- **Comfortable Discussing Money** – When a salesperson is uncomfortable having a financial discussion, it may have a significant, negative impact on any opportunity when the prospect lacks the funding or doesn't see the value in the offering.
- **High Threshold for Money** – A salesperson with a High Money Threshold should be able to ask for a lot of money (not to be confused with Able to Discuss Money) without concern for the amount being "a lot" to them personally.

The Selling Value Competency

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

Summary

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

WILL MIKE CLOSE EFFECTIVELY?

The Closing Competency

The Closing Competency helps us to understand whether or not Mike has the attributes that will help to convert qualified opportunities at the time they become closable. Some opportunities close later than expected because they were not closed at the first closing opportunity.

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

- Consultative selling skills
- Qualifying Skills
- Sales process (later in the document)
- Sales Posturing Skills (See the next table for the details)

The Closing Competency

Gets Prospect to Agree to Make a Decision	✗
Will Meet with the Decision Maker	✗
Will Find a Way to Close	✗
Not Likely to Take "Think it Overs"	✓
Unlikely to be Derailed by Put-Offs	✗
Appropriate Amount of Patience	✗
Closing Urgency	✗
Isn't Hoping to be Liked	✗
Will Stay in the Moment at Closing Time	✓
Won't Make Inappropriate Quotes	✗
% of Attributes 20%	
Weighted Score 19%	

Sales Posturing

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

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

A yellow flag indicates that Mike is neither strong nor weak in that particular quality.

The Sales Posturing Competency

Good Self-Image	✓
Quickly Develops Rapport	✗
Sales Optimism	✓
Sales Assertiveness (Consistently Assertive)	✓
Sales Empathy	✗
Appropriate Amount of Patience	✗
Will Build Trust	✗
Emphasizes Listening over Talking	✓
Healthy Skepticism	✗
44%	

Presenting

We look at presenting in a way that might be different from how you have historically viewed it. Today's modern salesperson should sell consultatively and present solutions to fully qualified prospects. Most salespeople fail to do that, presenting far too early in the sales process. The following table shows whether or not Mike is presenting at the right time, to the right people, and for the right reasons. We also show whether or not Mike is overly presentation-minded by identifying Mike's presentation tendencies, or the degree to which Mike relies on presentations to sell.

The Presentation Approach and Context Competency

Emphasizes Listening over Talking	✓
Able to Minimize Talking about Company Products or Solutions	✓
Not Compelled to Present	✗
Not Overly Reliant on Educating and Presenting	✗
Does Not Believe Presenting Equates to Controlling the Sales Process	✓
Does Not Believe Making A Proposal is the Most Important Part of the Sales Process	✓
Not Compelled to Propose or Quote	✗
Asks Enough Questions	✓
Takes Nothing for Granted	✓
% of Attributes 67%	
Weighted Score 65%	

Combined Impact of Competencies

This table shows the combined impact of the factors that affect closing.

Factors

Sales Process	✓
Consultative Selling	✓
Selling Value	✓
Qualifying	✓
Presenting	✗
Closing	✗

4

Summary

Mike has some of the basic elements in place to become a more effective closer.

DOES MIKE FOLLOW AN EFFECTIVE SALES PROCESS?

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

The Milestone-Centric Sales Process Competency

Follows Stages and Steps	
Process Has Most Key Milestones	
Process Has Adequate Sequence	
Consistent and Effective Results	
Little Wasted Time	
Has and/or Follows an Effective Process	
Uses an Effective Approach	
Relationship-Based	
CRM Savvy	
Strategic Use of Sales Scorecard	
% of Attributes	100%
Weighted Score	100%

As mentioned previously, Mike has an effective sales process in place. Below you'll find the factors that contribute to Mike's effective use of sales process.

Factors

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

4

WILL MIKE'S SALES FORECASTS BE ACCURATE?

The pipeline is a commonly used term for the flow of opportunities being pursued by you. New opportunities enter the pipeline and sold or lost opportunities exit the pipeline. It is a very simple concept with major implications. The pipeline can be represented as a useless spreadsheet or it can be the single most important predictor of success in the entire business.

If the pipeline is the most important predictor of future business success, then how does Mike measure up in that area?

The Qualifying Competency helps us to understand how thoroughly Mike qualifies opportunities. Here, the percentage is an accurate guide to how well, how often and how effectively Mike is qualifying. Remember, this Competency has a tremendous impact on the accuracy of the pipeline and forecast.

The Qualifying Competency

The Qualifying Competency

Meets with Decision Maker	
Uncovers Actual Budget	
Will Discuss Finances	
Knows Decision-Making Process	
Can Influence the Decision-Making Process	
Handles High-Ticket Pricing OK	
Doesn't Let Being Liked Get in the Way	
Able to Stay in the Moment	
Self-Limiting Beliefs Won't be an Obstacle	
Knows Why They Would Buy	
Asks about Everything	
Not Vulnerable to Competition	
% of Attributes	67%
Weighted Score	67%

Summary

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

CAN MIKE MORE EFFECTIVELY LEVERAGE SALES TECHNOLOGY?

As selling continues to evolve, the role of technology is more important than ever. Salespeople use a variety of tools but the three that are most important are CRM, Social Media, and virtual selling over Video. Below we take a look at your capabilities in all three areas.

The CRM-Savvy Competency

Regardless of the CRM platform being used, salespeople must engage with and embrace the software so that you know where in the sales process each opportunity is and what is required to get it closed; both the quantity and quality of the opportunities in your pipeline, and so that management has real time data about your opportunities and the pipeline.

The CRM-Savvy Competency

Lives in CRM	
Embraces CRM	
Updates Account Information at Least Daily	
Tracks Milestones Met in Sales Process	
Notates All Conversations	
Currently/Typically Uses CRM	
Competent CRM User	
Has Experience with Multiple CRM Applications	
% of Attributes	75%
Weighted Score	80%

The Social Selling Competency

More and more salespeople are using LinkedIn to connect with new prospects, and some are even using Twitter, Instagram and Facebook.

The Social Selling Competency

Connected to Potential Customers/Clients	✓
Generates Leads through Social Selling	✓
Well Connected	✓
Posts/Shares Updates for Visibility	✓
Uses LinkedIn	✓
Uses Twitter for Business	✓
% of Attributes	100%
Weighted Score	100%

The Video Proficient Competency

With more selling than ever taking place remotely over video, it is more important than ever to develop skills for using and selling over a video platform.

The Video Proficient Competency

Uses Video for Selling	✓
Frequent Video User	✓
Finds Video Useful	✓
Prefers Video to Phone	✓
Loves Video and Its Impact on Success	✓
Video Contributes to Success	✓
Uses Multiple Video Platforms	✓
Uses Accessories to Enhance Video	✓
% of Attributes	100%
Weighted Score	100%

Summary

The Embracing Sales Technology Competency

The CRM-Savvy Competency	80%
The Social Selling Competency	100%
The Video Proficient Competency	100%
Weighted Score	93%

Your use and proficiency with technology is good but of course there is always room for improvement. Keep in mind that the technology won't do the selling for you but it will make it easier for you to sell.

CAN MIKE WORK REMOTELY?

Below, you will find the criteria that we use to determine whether someone is able to work remotely and/or independently.

Finding

Will Hunt for New Business	✓
Self-Starter	✓
Takes Responsibility	✓
Effective Time Management	✓
Works Independently	✓
Able to Work Remotely without Supervision	✓

WILL MIKE EFFECTIVELY NEGOTIATE CONTRACTS?

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

The Negotiating Competency

Seeks Win/Win	✓
Willing to Walk	✓
Appropriate Amount of Patience	✗
Able to Listen/Ask with Ease	✓
Controls Emotions	✓
Goal Oriented	✓
Problem Solver	✓
Doesn't Need to be Liked	✗
Rejection Proof	✓
Selling Value	✓
Able to Discuss Money	✓
% of Attributes	82%
Weighted Score	84%

Summary

Mike has most of the attributes of a negotiator.

WILL MIKE EFFECTIVELY MANAGE EXISTING ACCOUNTS?

The Account Management Competency includes the skills that are suitable for account management, assigned accounts that one is to manage, handhold, solve problems, maintain and when possible, grow.

The Account Management Competency

Has Strong Relationships	✓
Will Handle Organizational Politics	✗
Will Make Friends Everywhere	✗
Will Follow Up Often	✗
Will Meet/Talk with Decision Makers	✗
Will Know the Real Budgets	✓
Won't Feel Urgency to Close Business	✓
Won't Alienate People	✓
Will Focus on Current Accounts Rather than Looking for New Accounts	✗
Will Manage Time Effectively	✓
	% of Attributes 50%
	Weighted Score 38%

Summary

Mike has a few of the attributes of an account manager.

WILL MIKE GROW KEY MAJOR ACCOUNTS?

The Farming Competency includes the skills that are suitable for farming which we define as large assigned accounts where salespeople are responsible for growth across the enterprise.

The Farming Competency

Attempts to Close	✗
Has Closing Urgency	✗
Won't "Understand" Most Objections	✓
Won't Panic Over Objections	✓
Handles "It's a Lot of Money" Objection	✓
Won't Accept Put-Offs	✗
Will be Very Likable	✗
Won't Alienate Customers	✗
Unlikely to be Distracted by New Accounts	✗
	% of Attributes 33%
	Weighted Score 40%

Summary

Mike has a few of the attributes of a farmer.