SALES PRO AS A COACHING TOOL

Sales Pro as a Training Tool: Summary of Components

Purpose of Sales Pro	Measures the suitability for different types of sales roles

Sales Fit: Predicts expected performance at the end of 2nd year. Exercise caution for candidates that score <+30

SALES PRO Component	Look for observable behaviour	How will it affect your method of training?
BD – Enterprising Potential - Business Development: Ability to focus on personal effort to achieve goals (self-management) 1. Is salesperson a planner? 2. How well does salesperson manage his/her own time? 3. Does salesperson monitor his/her daily effort? 4. How comfortable is salesperson with prospecting?	**Planning** • How well has the salesperson developed skills in planning? • Does salesperson require continuing assistance in creating and maintaining a personal activities game plan? **Time Management** • Does salesperson require continuing assistance in organizing his/her time? • Is the remedy to be found in more training or more effort on the part of the new salesperson? **Daily Effort** • Have the activity levels been set appropriately? • Is salesperson following through on performance? **Prospecting** • Does salesperson have a natural market? • What is salesperson's target market profile? • What will be salesperson's approach?	**High** (>90+: Strong; +80 to +90: Good) • Focus on marketing plan development, script and approach geared at salesperson's target market profile **Moderate** (+70 to +80: Low Average) • Same as above but increase emphasis on role-play and activity plan. **Low** (+60 to +70: Weak; +50 to 60: Caution) • Same as above but strong emphasis on activity plan – who to call, when to call and how to call. • Emphasize script and role-play and do some joint prospecting/phoning to model and observe. ***For all scores – Sales training including role-play on handling objections are critical.***
AP – Achievement Potential: Approach to Selling & Closing (hard, soft) • Evaluates the intensity and durability of effort and commitment Is salesperson motivated by income, challenge, service or security?	**High** • How can you focus on the "challenge" of the job? • How can you focus on future earnings as a motivator? • Have they developed an effective closing style? **Moderate** • Has he/she developed an effective "track" for closing which fits their style and motivational pattern? **Low** • What does he/she want to achieve in terms of income, service to others and self, etc.? **Caution**: • Investigate motivation – may be too focused on money	**High** (0 to +30: Excellent –Challenge/Money) • Ensure salesperson makes a correlation between effective sales skills and their income potential. **Moderate** (0 to –15 – Low Average) • Balanced between Money/Challenge and People/Service. Will be naturally responsive to client's requests and will need some coaching on how to close sales. **Low** (< -15: Caution - Safety/Security) • Emphasis on closing is critical as this will be out of the salesperson's comfort zone. Track to run on will be key and it will be important to model and observe closing via role-play. **Caution** (> +30 – Money) • Focus is primarily on needs-based selling.

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SS - Structure and Systems: Need for structure and managerial support (team, independent)	**Very Independent/Independent** • How will you maintain a "quality control" check? • Does this level of independence fit with our culture? **Moderate** (mixed between independent and team oriented) • Has the new salesperson had any problems with his/her approach to clients, which might indicate a need for greater or less independence? • Do I need to adapt my managerial style to better develop the new salesperson? • Does the new salesperson need to adapt his/her style to fit into the culture of our team? **Very Team Oriented** • Has the salesperson begun to develop dependency relationships on you, other managers, salespeople or support staff? If so, how will you keep salesperson under control so that he/she does not become destructive within the office? • Does this salesperson take up an unusually large percentage of your time? • How can you train this salesperson to become more independent?	**Very Independent** (> +75: Caution) • Monitor this candidate to ensure he/she is learning and applying the learning. May feel there's nothing you can teach him/her. **Independent** (+50 to +75: Strong) • Teach this individual the essentials and then get him/her out selling! They learn best by doing. **Moderate** (+35 to +50: Average) • This salesperson is a good candidate for a structured group approach to training. • Role play **Low** (+25 to +35: Weak) • Monitor this type of salesperson to ensure you gradually promote independence from you in the office. • Train but do not do for salesperson. Don't answer all questions or solve all problems. Point salesperson in the right direction but encourage him/her to come up with the answer/solution. Positively reinforce when he/she has done something independently. • Restrict your open door policy. Articulate your expectations of a salesperson and what reasonable expectations he/she can have of you.
PO - People Orientation: Style/approach in establishing relationships • Motivation and satisfaction obtained by human aspects of the business • Type of environment which the individual will be most at ease	• How does salesperson feel about meeting and putting people at ease? • How well does salesperson adjust to different personalities	**Very Sociable** (>+30) • Monitor this salesperson to ensure he/she is aware of time spent socializing versus developing productive relationships • Training should include exposure to a variety of other people **Sociable** (+10 to +30) • Provide a balance of interaction with other people **Somewhat Sociable** (-5 to +9) • Help develop an approach to meeting new people **Caution** (<= -6) • This person prefers to develop relationships very gradually and may not be suited to this career

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Analytical Orientation: Motivation and satisfaction gained from education & personal development activities	• How does salesperson feel about going back to school and learning new things related to the job • What are salesperson's current technical/practical competencies	**Strong** (> +21) • May have the need to know everything before going out to see a client/prospect. • Will need to thoroughly train on key basics and then get salesperson out selling. Determine if salesperson has sufficient knowledge, which will boost confidence level. • Ensure salesperson knows how to handle situation if he/she did not know something. • Ensure salesperson understands all resources e.g. Management, and specialists available if needed and how to position that positively with a prospect/client. **Good** (+1 to +20) • Deliver standard training **Weak** (-15 to +1) • Just In Time (JIT) learning will be key • May not have discipline to self-study • May prefer to be taught in interactive session • May learn best by applying knowledge during training • Ensure they have the knowledge needed to properly service their clients. **Caution** (< -15) • Build in checks to ensure salesperson is learning the required information • Same techniques for "Weak" scores
SD – Self Confidence: Reflects current level of confidence • Degree people feel in control of their own future through their own actions	• What systems will you put in place to ensure this individual is able to control the many facets of their life? • Does the salesperson analyse his/her mistakes and eventually learn from them? • Does salesperson make the same errors over and over again? **Caution** • Has salesperson's self confidence improved in the early stages of training? Has it deteriorated • Is low self confidence and/or an external locus of control making it hard to teach and/or manage this person	**Excellent** (> +50) • Provide constructive feedback; salesperson will be constructively critical about own performance **Average** (+35 to +50) • Same as above **Low Average** (+25 to +35) • Same as above **Caution** (<+25) & **RED FLAG** (<+10) • Create opportunities to build/rebuild self confidence

CR – Call Reluctance Score: Attitude toward making sales calls	• What is the salesperson's mindset? • If it is a strong mindset based on emotion, it may be difficult to overcome and there will be little training that can be done to offset this. In this case the candidate would either have to reconsider the career, compensate for their CR by hiring someone to do this or aligning with another salesperson who can call.	**Excellent** (50+) • Deliver standard training **Above Average** (35 to 50) • Deliver standard training **Good -** (25 to 35) • Deliver standard training **Some Concerns -** (10 to 25) • If it is not a deep emotional mindset – reposition calling and receiving rejection as a positive (e.g. establish a competition based on how many **NO**s a salesperson gets in an evening). • Ensure there is a track and script to run on and emphasize handling objections. Lots of role-play on calling will be key. **Caution** (<10) • Create opportunities to build/rebuild self confidence
CR sub-scale: Managing Rejection: how the salesperson interprets rejection	• Is salesperson responding to internal clues rather than focusing on how the client was responding during the sales process? • Does salesperson need to be liked by everyone? • Does salesperson have a fear of not being liked by everyone? • Does salesperson take client's criticism personally?	**Coach to Success** • Skills training will build on inherent strength levels. Deliver standard training • Salesperson will respond to internal cues rather than focus on how the client is responding during the sales process **Needs Training** • Salesperson will have some discomfort with rejection but will overcome these feeling with training and experience • Coach on how to place less emphasis on internal cues and provide strategies for dealing with fear of not being liked **Very Sensitive** • Help salesperson to interpret client actions as feedback not personal criticism
CR sub-scale: Prospecting Orientation: comfort level in approaching one's natural and cold markets	• Is salesperson comfortable with meeting new people? • Does salesperson enjoy the challenge of dealing with prospects in her natural market?	**Coach to Success** • Will enjoy and be comfortable with prospecting natural markets • Coach and pair with a mentor on how to prospect in cold markets **Needs Training** • Will need some coaching on how to build prospects and how to identify/network both warm and cold sources **Requires Leads/Traffic** • Salesperson will be most comfortable working with referrals and needs an existing client base to be successful • Will need a mentor to help identify new prospects and extensive training on how to use and build on natural market

CR sub-scale: **Commitment to Product:** Attitude toward the product and its impact on performance	• What does the salesperson think of our products?	**Less Necessary** • Focuses on needs based selling • Naturally understands the benefits of the product • Provide coaching on how to deal with clients who would be the most resistant to buying the product. **Desirable** • Help salesperson understand how the products can help his/her clients • Will develop a stronger commitment to product after receiving positive feedback from clients • Provide coaching on how to deal with resistant clients and on how to approach sales outside his/her natural market **Essential** • Spend extra time developing the salesperson's understanding of how our products can help his/her clients. Salesperson will not be able to sell the products unless he/she believes in them. • Provide coaching and training as indicated above
CR sub-scale: **Commitment to a Sales Career:** Attitude toward the career and its impact on performance	• How does the salesperson feel about the career?	**High** • No impact on training • Sales careers are well regarded **Selective Careers** • Certain types of sales careers would be okay • Build confidence in the career **Specific Careers only** • Work on creating a more positive perception of sales as a career • Examine his/her personal experiences with other salespeople.

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UC – Uncertainty Scale – Reliability of results

Reliable (0 to +45)
- Use information in report to build your training program

Somewhat Reliable (+46 to +60)
- Use information in report to build your training program
- Observe salesperson's behaviour to ensure the training program reflects his/her needs & style

Caution (> +60)
Need to validate salesperson's behaviour through observation
- Is it possible the salesperson was trying to impress the recruiter with an inflated positive self-image?
  - ➢ Salesperson may be come quite defensive or be unable to explain his/her responses

- Is it possible the salesperson was experiencing language difficulties?
  - ➢ A lack of explanation will be evident

- Is it possible that the salesperson just selected the answers in a random manner?
  - ➢ A lack of explanation will be evident