

Salesperson Skills

Name: _____ Company: _____ Date: _____

Sales Planning: Scored: ____ of 7 Items

- Identifies prospective customers for products and services.
- Sets realistic sales goals.
- Develops an overall plan for reaching sales goals.
- Gets facts about a prospect's company before making a first call.
- Calls on customers in the appropriate cycle and at the right times.
- Plans specific outcomes and activities for each sales call.
- Creates a planned account development strategy for each major account.

Sales Administration: Scored: ____ of 5 Items

- Submits all reports correctly and on time.
- Maintains complete, up-to-date account records.
- Manages expenses within budget.
- Uses sales support materials and supplies to improve sales results.
- Uses technology tools (computer, phone, fax, etc.) to improve sales results.

Building Customer Relationships: Scored: ____ of 4 Items

- Opens each prospect call or meeting with a statement of purpose and process.
- Develops rapport quickly with potential customers.
- Shows interpersonal skill when relating to customers.
- Cooperates with customers to achieve desired results.

Determining Customer Needs: Scored: ____ of 5 Items

- Approaches initial discussions with prospect as "information gathering" versus "interrogation."
- Asks about prospect's needs: situation, problem, implications, and cost of problem.
- Asks about customer's buying conditions: criteria, budget, decision makers and timing.
- Listens actively to customer by being attentive, taking notes and summarizing.
- Confirms fully with customer an understanding of needs before presenting solutions.

Creating Customer Solutions: Scored: ____ of 5 Items

- Applies creativity in building solutions.
- Works well with company's internal personnel to create solutions.
- Considers creative options when exploring solutions.
- Considers competition when shaping solutions.
- Creates solutions focused on customer's financial, service, and psychological value.

Presenting Customer Solutions: Scored: ____ of 4 Items

- Writes sales proposals that communicate solutions clearly and persuasively.
- Gives clear and persuasive one-on-one sales presentations.
- Gives clear and persuasive group sales presentations.
- Responds to customer questions and challenges with appropriate information, benefits, and evidence.

Facilitating Sales Agreement: Scored: ____ of 19 Items

- Approaches the close as a process rather than an event.
- Uses stakeholders within the organization to influence decision makers.
- Asks for the business when appropriate.
- Negotiates creative win-win sales agreements.
- Managing Sales Accounts:
 - Asks about the customer's value expectations.
 - Monitors customer satisfaction.
 - Resolves service problems to the customer's satisfaction.
 - If needed, conducts effective start-up routines and training for new applications.
- Maintains good relationships with key personnel in the organization.
- Coordinates contacts with the customer to ensure delivery of desired value.
- Building Internal Company Relationships:
 - Expresses a positive, "can-do" outlook.
 - Communicates with staff about customer needs.
 - Discusses with staff ways to deliver needed outputs.
- Resolves sales-related conflicts promptly and effectively.
- Coordinates team effort in the sales process.
- Keeps higher-level managers informed as required.
- Recognizes others in the company for their support to sales initiatives.

Increasing Sales Effectiveness: Scored: ____ of 14 Items

- Conducts effective meetings.
- Achieves assigned sales goals.
- Meets deadlines and commitments.
- Accepts new sales goals and challenges.
- Takes responsibility for decisions, actions, and results.
- Exercises good judgment in decision making.
- Manages emotions under stressful situations.
- Deals effectively with change and ambiguity.
- Takes initiative to prevent problems or resolve them before they get out of hand.
- Learns from experience.
- Develops new skills and knowledge.

- Adheres to organizational standards of ethics.
- Seeks and uses feedback from others.
- Presents a professional image.

Coaching: Scored: ____ of 7 Items

- Determines what salespeople need to be successful.
- Puts a higher priority on sales skills than on administrative procedures.
- Gives salespeople activities that will help them improve sales skills.
- Gives backup and expertise to salespeople to help them close sales.
- Gives salespeople feedback about their behavior and performance.
- Helps salespeople set performance goals.
- Helps salespeople self-development goals.

Delegation: Scored: ____ of 5 Items

- Asks for and listens to salespeople's views and recommendations.
- Makes assignments based on skill level and business maturity.
- When making assignments, gives full information, timeline, and results expectations.
- Demonstrates trust in employees' ability to accomplish tasks and produce results.
- Follows up to ensure that delegated actions are completed.

Profit Mentality: Scored: ____ of 5 Items

- Places a high priority on achieving bottom-line results.
- Sets realistic but ambitious goals to achieve bottom-line results.
- Shows strong confidence in ability of sales team to achieve bottom-line results.
- Initiates action to resolve issues and achieve bottom-line results.
- Accepts accountability for bottom-line results.

Initiative: Scored: ____ of 4 Items

- Exhibits personal leadership and initiative.
- Anticipates and prepares for specific problems or opportunities.
- Proactively takes action to create opportunities and avoid future crises.
- Shows persistence to overcome obstacles or rejection.

Answering Objections: Scored: ____ of 5 Items

- Probes for concerns that may create a barrier to making the sale.
- Listens to and considers customer input and suggestions.
- Listens to objections and defensiveness without taking them personally.
- Expresses an understanding of customers' feelings and concerns.
- Offers creative options to resolve customers' objections.

Customer Relations: Scored: ____ of 7 Items

- Builds goodwill with customers.
- Demonstrates continued personal concern for customers.
- Calls regularly on key customers, especially when there have been problems.
- Tries to understand the customers' problems and needs.
- Responds quickly to resolve customer problems.
- Helps salespeople react to customers' needs.
- Continually improves business processes to better serve customers.

Account Penetration: Scored: ____ of 4 Items

- Develops a special sales strategy for key customers.
- Tracks and analyzes the quality of products or services.
- Tracks product and service consumption to be alert to problems.
- Finds new ways to increase sales of current products and services.

Practical Intelligence: Scored: ____ of 5 Items

- Pursues learning in a wide array of topics.
- Shares current knowledge of related business issues with sales team.
- Shows interest in the practical applications of related knowledge.
- Keeps up to date with best-in-class practices and developments.
- Quickly master's new technical knowledge related to sales, services, and products.

Analytic Ability: Scored: ____ of 5 Items

- Demonstrates the ability to think through and analyze problems logically.
- Avoids making assumption or jumping to conclusions.
- Identifies alternative solutions to problems.
- Evaluates and compares alternative solutions to problems.
- Anticipates obstacles realistically and plans ways to deal with them.
- Modifies plans in response to changing conditions.

Teamwork: Scored: ____ of 7 Items

- Works effectively with other members of the team.
- Recruits and selects talented and motivated team members.
- Gives team members guidance.
- Gives team members encouragement when needed.
- Rewards and recognizes outstanding achievements.
- Keeps other team members informed about each other's progress.
- Actively helps team members reach their goals.

Political Acumen: Scored: ____ of 4 Items

- Works effectively with others in the organization.
- Focuses on establishing supportive relationships with external influencers.
- Contacts extensive network of people to gain support of team goals.
- Works to make positive results visible.

Visioning: Scored: ____ of 3 Items

- Expresses a compelling vision for the sales team.
- Takes charge in creating a strategy to achieve the vision.
- Maintains active short- and long-range plans to achieve the vision.

Communicating: Scored: ____ of 3 Items

- Communicates clearly and correctly in writing.
- Expresses ideas and opinions so that people understand them.
- Communicates effectively to gain acceptance of ideas and opinions.