



Bravo Sales Team

Sales CheckPoint Performance Feedback System™ Executive Overview

Report Prepared: January 2, 2013

CONFIDENTIAL

This report includes responses from:
30 Salespeople and their Sales Managers

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imagine great people®

The Sales CheckPoint System

The purpose of the *Sales CheckPoint* System is to identify sales behaviors as viewed by a Sales Manager who knows and has had the opportunity to observe the Salesperson in the selling environment. This is accomplished with the collection of ratings from the Sales Manager and Salesperson.

There are 79 sales behaviors presented as survey items. These 79 items are grouped into 19 Skill Sets which further group into 7 Universal Sales Competencies. Each rater reports their experience of observing the Salesperson with a rating on each of the items.

In the 79 Sales CheckPoint survey items the raters chose between six possible choices. Based on their observations they indicated the percentage of time they felt the Salesperson displayed each behavior. The sixth choice was "No Opportunity," which was selected when the rater had no opportunity to observe or rate the listed behavior and thus could not provide a meaningful response. These six possible responses were:

Response	Description	Percentage of Time
1	Almost Never	0 - 10%
2	Seldom	11 - 39%
3	Sometimes	40 - 60%
4	Usually	61 - 89%
5	Almost Always	90 - 100%
N	No opportunity to observe this behavior	

There are 19 Skill Sets that are critical for success in most sales positions. They are grouped into 7 Universal Sales Competencies. When a Salesperson frequently displays certain behaviors which are a part of these Sales Competencies, they are typically identified as effective and successful in sales.

The 7 Universal Sales Competencies and their 19 Skill Sets are listed below.

1. Entrepreneurial Approach

- Reflects entrepreneurial attitude
- Time optimization
- Sets effective goals

2. Understands the Prospect

- Recognizes buyer behavior
- Understands the purchasing process

3. Develops Appropriate Solutions

- Uses feature and benefit solutions
- Knowledge of products

4. Prospects Proactively

- Identifies prospects
- Gets appointments

5. Manages Selling Process

- Understands client-centric selling
- Establishes rapport
- Identifies prospect's needs
- Counsels prospect

6. Closes the Sale

- Explores prospect's options
- Presents ideal solution
- Overcomes objections
- Closes effectively

7. Manages Sales Relationships

- Secures the relationship
- Develops the relationship

Favorable Zone: The Favorable Zone represents a range of scores (4.0 to 5.0) where a group of experienced Sales Managers and sales trainers expect an effective Salesperson to be rated. It simply suggests that each Skill Set is important to success and that all Salespeople should remain focused on attaining that level of behavior.

Introduction to the Executive Overview

This report presents a summary view of the *Sales CheckPoint* recently completed by 30 Salespeople and their Sales Managers in your organization. The results should be used to facilitate a Salesperson's focus as they work with their Sales Manager to implement a unique plan for sales development.

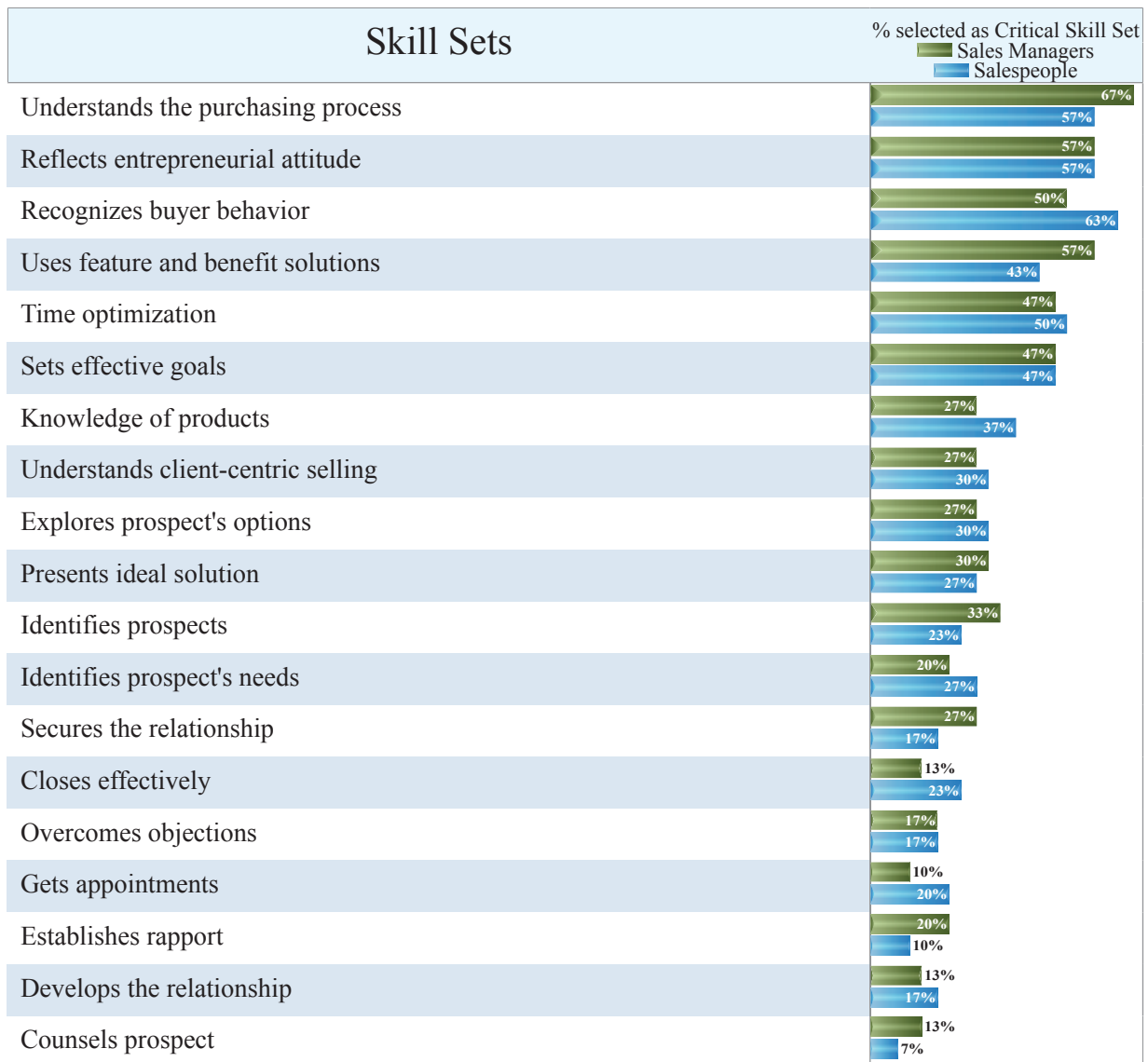
The collected ratings were analyzed to produce three useful indicators of the sales strengths of your group:

- **Sales Team Alignment** – An important aspect of a business relationship is the degree of alignment between Salespeople and their respective Sales Managers regarding the skills critical for success. Both the Salespeople and their Sales Managers were presented with the 19 Skill Sets and asked to select the six Skill Sets they felt were most critical for success in the position. The extent that a Salesperson and a Sales Manager agreed on which of the 19 Skill Sets are most critical to success is reflected in the Sales Team Alignment percentage. An absolute agreement between a Salesperson and their Sales Manager would be 100%. If they each selected six different Skill Sets the percent of alignment would be 0%. This alignment is an excellent indicator of the effectiveness of communication among your sales organization. A high average percentage alignment here suggests a common view of the skills necessary to be a successful Salesperson.
- **Organizational Competency Development Summary** – This is an overall summary of how the Salespeople were rated by their Sales Managers on each of the 7 Sales Competencies. Each bar shows the percentage of ratings that fell below the Favorable Zone and then in or above the Favorable Zone. There is one bar for the Sales Managers' ratings of the Salespeople and another bar for the Salespeople rating themselves.
- **Organizational Skill Set Development Summary** – Each Sales Competency is made up of two or more of the 19 Skill Sets used to rate a Salesperson's actual behaviors. After each rater has indicated the frequency a Salesperson expresses these important behaviors in the actual sales situation, an average rating is reported for each Skill Set. This provides a look at the percentage of your Salespeople who fall below the Favorable Zone on each Skill Set based on the average ratings of the Sales Managers and then on the average ratings of the Salespeople's ratings of themselves.

Sales Team Alignment

The 30 Salespeople and their Sales Managers were presented with the 19 Skill Sets and each identified the 6 Skill Sets they considered to be most critical to success in selling. The Overall Sales Team Alignment represents the degree of alignment between each Salesperson and their respective Sales Managers averaged together to provide an overall rating. Shown to the right are the percentage of Salespeople and their Sales Managers selecting each Skill Set as a Critical Skill Set. These Skill Sets are presented in descending order based on the combined frequency of selection by both Salespeople and Sales Managers.

Overall Sales Team Alignment – 53%



Organizational Competency Development Summary

This table represents an overall average of the ratings for all 7 Universal Sales Competencies. The first bar shows the Sales Managers' ratings of the Salespeople. The first percentage is of the average ratings that fell below the Favorable Zone and the second percentage are those that were in or above the Favorable Zone per the Sales Manager's ratings. The second bar displays the average percentage of the Salespeople rating themselves. The first percentage represents the average ratings that fell below the Favorable Zone and the second percentage are those that were in or above the Favorable Zone.

Universal Sales Competencies	Favorable Zone	
	Sales Managers	Salespeople
<u>Manages Selling Process</u> Focuses on client centered solution selling as a process to meet prospect's needs while impacting the bottom line.	58% Below / 42% In	54% Below / 46% In
<u>Manages Sales Relationships</u> Maintains prospect focus through the entire sales process and delivers solutions as promised.	58% Below / 42% In	54% Below / 46% In
<u>Develops Appropriate Solutions</u> Aligns products or services with prospect's needs and offers solutions to satisfy those needs.	54% Below / 46% In	58% Below / 42% In
<u>Closes the Sale</u> Controls the sales process and expertly guides the prospect to the logical final step by obtaining a positive decision and sales agreement.	54% Below / 46% In	50% Below / 50% In
<u>Entrepreneurial Approach</u> Willingness to take the initiative to start projects or ventures and to accept the risk associated with them.	50% Below / 50% In	50% Below / 50% In
<u>Understands the Prospect</u> Recognizes the needs and desires of prospects and keeps a focus on the prospect and those needs.	50% Below / 50% In	50% Below / 50% In
<u>Prospects Proactively</u> Actively seeks out potential customers and efficiently identifies those that represent real possibilities for sales.	50% Below / 50% In	62% Below / 38% In

Organizational Skill Set Development Summary

This table represents an overall average of the ratings for the 19 Skill Sets. The first bar shows the Sales Managers' ratings of the Salespeople. The first percentage is of the average ratings that fell below the Favorable Zone and the second percentage are those that were in or above the Favorable Zone. The second bar displays the average percentage of the Salespeople rating themselves. The first percentage is of the average ratings that fell below the Favorable Zone and the second percentage are those that were in or above the Favorable Zone. These Skill Sets are presented in descending order based on the ratings of the Sales Manager that fell below the Favorable Zone. Shown in the Critical Skill Ranking column is the ranking of each of the six Skill Sets that were rated as most critical for selling successfully by the Salespeople and their Sales Managers.

Skill Sets (Competency)	Ranked Top Six Critical Skills	Favorable Zone	
		Sales Managers Below	Sales Managers In
Identifies prospect's needs (<i>Manages Selling Process</i>): Uncovers the real needs of prospects to increase the likelihood of making a sale and increasing client satisfaction.		62%	38%
		58%	42%
Explores prospect's options (<i>Closes the Sale</i>): Provides prospect with choices tailored to their identified needs.		62%	38%
		48%	52%
Develops the relationship (<i>Manages Sales Relationships</i>): Creates and maintains client loyalty by building a reputation by following up on the sale and effectively servicing client after the sale.		62%	38%
		50%	50%
Counsels prospect (<i>Manages Selling Process</i>): Counsels prospect to increase the sense of urgency and create discontent with the status quo.		58%	42%
		46%	54%
Closes effectively (<i>Closes the Sale</i>): Guides prospect through the entire sales process and uses ethical methods to help prospect decide to buy.		58%	42%
		52%	48%
Uses feature and benefit solutions (<i>Develops Appropriate Solutions</i>): Develops and offers solutions by communicating product characteristics and identifying how those characteristics will satisfy the prospect's needs.	4	54%	46%
		54%	46%
Secures the relationship (<i>Manages Sales Relationships</i>): Stays in front of client and prospect's needs and establishes opportunities to generate contacts and do more business with them.		54%	46%
		50%	50%
Understands the purchasing process (<i>Understands the Prospect</i>): Exhibits knowledge of the roles, goals, and processes of purchasing professionals and develops relationships with them.	1	52%	48%
		46%	54%

Skill Sets (Competency)	Ranked Top Six Critical Skills	Favorable Zone	
		Sales Managers	Salespeople
Identifies prospects (<i>Prospects Proactively</i>): Recognizes the characteristics of ideal prospects and focuses time and activities on those with the highest probability of becoming good clients.		Below	In
		50%	50%
Understands client-centric selling (<i>Manages Selling Process</i>): Recognizes prospect's needs and strives to make the buying process as easy as possible.		Below	In
		52%	48%
Overcomes objections (<i>Closes the Sale</i>): Recognizes prospect's objections and provides clear and concise information to raise prospect's satisfaction level.		Below	In
		50%	50%
Reflects entrepreneurial attitude (<i>Entrepreneurial Approach</i>): Creates a positive climate for producing results. Accepts responsibility and practices high standards both professionally and personally. Works diligently to meet the needs of prospects and clients.	2	Below	In
		48%	52%
Sets effective goals (<i>Entrepreneurial Approach</i>): Works to improve sales performance by establishing manageable and realistic goals and objectives, and pursues them in a systematic and efficient manner.	6	Below	In
		58%	42%
Recognizes buyer behavior (<i>Understands the Prospect</i>): Identifies reasons prospects buy products or services and uses this knowledge to enhance sales approach.	3	Below	In
		46%	54%
Gets appointments (<i>Prospects Proactively</i>): Develops and implements relevant, compelling, client-centric communications to support efforts of getting meetings with prospects.		Below	In
		48%	52%
Establishes rapport (<i>Manages Selling Process</i>): Develops client relationships by building credibility and determining the specific and relevant linkages between salesperson and prospect.		Below	In
		46%	54%
Presents ideal solution (<i>Closes the Sale</i>): Demonstrates an understanding of prospect's needs and desires and uses product expertise to provide viable options for a solution.		Below	In
		46%	54%
Time optimization (<i>Entrepreneurial Approach</i>): Manages time wisely and balances time selling with time servicing clients.	5	Below	In
		42%	58%
Knowledge of products (<i>Develops Appropriate Solutions</i>): Displays expert knowledge of products and services and uses this knowledge to quickly and effortlessly address a prospect's needs.		Below	In
		40%	60%

Increasing Your Overall Sales Potential

Developing a Plan

The challenge for all organizations is creating a culture that will foster a level of commitment and accountability to the ongoing development of the individual Salesperson. The success of the Sales CheckPoint process is not in the execution of the surveys, but in the follow through in developing your Salespeople.

This Executive Overview Report contains a condensed view of the results from the Sales CheckPoint. This information is useful in identifying the overall capabilities of your sales organization.

The reports provided to each Salesperson and Sales Manager goes into great detail in identifying each Salesperson's strengths and weaknesses. The key to enhancing the organization's sales strategies is ensuring that Salespeople at all levels in the organization utilize the provided information to create an action plan for their ongoing development. While it is important that the Sales Manager work with each Salesperson to improve their management skills, Salespeople should be held personally accountable for their own development through an individual plan supported by coaching and continuous feedback from their leadership.

As Salespeople benefit from this ongoing development process and their sales effectiveness increases, the impact on the overall performance of the organization will become apparent. Progress will be demonstrated with subsequent Sales CheckPoint surveys which will also highlight those areas still needing attention.