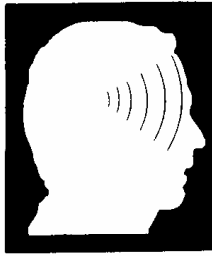




Profile Of Your Client Development Organization



OBJECTIVE MANAGEMENT GROUP, INC.

Dear Client,

Thank you for choosing the Dave Kurlan Client Development Profile. In this document I present my comprehensive overview of your client development organization. With a simple orientation to some basic Dave Kurlan concepts and your thorough review of my commentary on each of your people, you will know the specific areas requiring development that will directly improve your people, their managers, your client development management processes and your company's business development performance.

The Dave Kurlan Sales Force Profile has been used to analyze tens of thousands of people in thousands of companies in North America since 1989. You can use the results of our evaluation of your company with confidence. It highlights the areas for development that really matter for business development results.

What's In Your Profile:

1. This **introduction** which includes **important expectations**
2. Additional detail on any **major weakness** within your client development organization
3. Specific **Strengths and Weaknesses** for each of your people
4. Growth potential for each person in 21 key business development areas
5. Each person's personal evaluation
6. **Key Concepts** which are the foundation of our evaluations

Managing Your Emotions And Building A Better Client Development Organization:

There probably won't be a correlation between those that either possess the greatest potential for growth or those who we report to be strong people and your top revenue producers. This happens when your top producers either have worked in your industry for a long time, don't possess the best skills or have inherited most of their accounts. Keep in mind that the evaluation measures each individual's potential for growth rather than their historical results. So your focus for development must be on growth potential.

As you read the commentary, you may feel some resistance. When your people review their evaluations, you may see them becoming resistant as well. It is typical when you or an employee finds what appears to be a "discrepancy" with some aspect of the findings. The substantial amount of experience I have in providing evaluations allows us to say that there *aren't any actual discrepancies*. I have included a copy of "The Subtle Differences Between Similar Findings" at the end of my commentary. You may wish to refer to that now.

Resistance will take place any time someone believes that the findings and recommendations differ from his own expectations and/or experiences.

Tom Kasten, of Levi-Strauss, has three rules about resistance, according to Fast Company Magazine. His first is that you must expect it because human beings inevitably exaggerate the joys of the past, the pain of the present and the risks of the future. It's perfectly natural. Second, he says, "Don't take it personally. Third, he suggests that resistance "comes in code." An example might sound like; "This doesn't really apply to our business."

Mike Hammer says that people's resistance to change is the most perplexing, annoying, distressing and confusing part of re-engineering, according to Fortune Magazine. The key to the success of any new strategy is implementation, and that comes from people. People have to execute. They must support and embrace new ideas and processes or they won't move forward. Processes aren't so hard but people are difficult. People naturally resist change.

Andrew Grove, CEO at Intel, told Fast Company Magazine that there is at least one point in the history of any company when you have to change dramatically to rise to the next performance level. Miss that moment and you start to decline.

So expect to feel some resistance. On some occasions, close-minded managers will attempt to discredit the findings with which they don't agree. Sometimes it's more useful to simply ask, "why didn't I see that" instead of denying a meaningful and useful finding.

The Findings Will Match Your Sell Cycle:

Whether your people are attempting to close business at the end of their first call or on the seventeenth call of a longer customer focused process, one thing will ring true throughout this overview. You will finally understand why some or all of them are failing to consistently succeed.

Evaluating your organization will help to determine how much more business could be closed and to learn why some of that business wasn't generated in the past. As you digest the overview information you will notice that I place a great deal of emphasis on what interferes with the ability to close more business. With all the emphasis I place on closing you may reason that this entire overview only applies to a short, "sell 'em and move on"

business or products but not services. However, nothing could be further from the truth. My focus on that particular event does not in any way cause this information to become irrelevant for a longer, customer focused, service intensive business development process.

Whether you have a long or short sell cycle you will find information in this overview that will help you close a larger percentage of opportunities.

Delivery Style:

As you begin to read through the meat of the overview you'll notice that I haven't sugarcoated anything and I let the chips fall where they may. I want you to know that I have *not* taken that approach with the individual evaluations that will be read by your people. Don't be afraid of giving your people their copies of the evaluations. While I did show each of them the areas in which they must improve, I have taken pains to do it nicely and in a way that is non-threatening to them.

Since all of our findings, in both the overview and the individual evaluations, are the result of actual data provided by your people, it's important to let the data eliminate subjective debate. One final suggestion: Finish this process! It's very easy to let fear stand in the way. Please don't! Reread the overview and evaluations. Review the evaluations with each of your people. Provide appropriate training and coaching to those people that will respond. Make the recommended changes to your management process to achieve the results that we predict. Finish this process!

Your Satisfaction:

If you have any questions that cannot be answered to your satisfaction, call me personally at 1-800-221-6337. I hope that the overview helps you plan for future business success, build an improved business development organization and develop the proper training to help your company grow. And remember: if you always do what you've always done, you'll always get what you've always gotten!

Sincerely,

Dave Kurlan

Basic Concepts

The foundation of the evaluations and overview is based on four key components:

- 1) Crucial Elements for Success
The crucial elements for success are “conditions” that must be present in order to affect growth and change. In other words, if you want a particular person to improve, that person must have enough strengths in the area of Desire, Commitment, Outlook and Responsibility.
- 2) Hidden Major Weaknesses – These are powerful weaknesses that are usually hidden from view – both yours and the individual’s. These weaknesses, when present in certain combinations, are powerful enough to neutralize *all* of a person’s strengths and skills. I’ll talk more about Need for Approval, Non-Supportive Buy Cycle, Tendancy to Become Emotionally Involved, Discomfort Talking About Money and Self-Limiting Record Collection later in my commentary.
- 3) Growth Potential – We measure a person’s incentive to change (derived from Desire, Commitment and Outlook) and factor in the number of hidden major weaknesses. The stronger the incentive to change and the more existing weaknesses that are present, the greater the potential for growth.
- 4) Commonality – The overview contains explanations for each of the common weaknesses affecting your people as well as commentary on how they affect the people who have them. I will isolate the issues that are extremely important. I will identify individuals that should be singled out for either unusually strong or weak client development characteristics.

The Rather Obvious Format

You’ve already realized that the introduction is boiler plate. As you read further into the overview you will find the information presented in two ways. Findings, explanations and candid commentary. While the findings and the commentary are very much real and up to date, it takes a tremendous amount of time and work to assemble all of the information in such a way that my findings and comments can be both informative and helpful in creating change. Since some of the explanations of weaknesses never change, I have prewritten those short portions of text in advance. Despite that, please don't discount the importance of the information.

Now let's take a look at your people. We'll start with the four elements for success.

OUTLOOK

You, Richard and Pam all have what I believe is an outlook problem.

When people have an outlook problem you need to monitor them more closely than usual. Their situation could easily change, either by dramatically improving or worsening. Since outlook is the most variable element for success, any of your people could develop an outlook problem on any particular day. It's important for them to discover the underlying cause, especially when the problem is a chronic one. Perhaps you can provide some help in this area. An outlook problem has a negative impact on bravery and that causes people to be very ineffective during the moments when they must be strong. You may be able to recognize some of the symptoms of an outlook problem. They can include any of the following: excuse making, an attitude problem, a chip on the shoulder, complaining, disregard for policies or requests, a slump, unrealistic expectations, an aversion to accountability, a need for more structure and a low self-image. An individual that had problems with the questions in the folio is really telling you that he doesn't really 'fit' in client development. In other words, he has an unrealistic view of how client development should be conducted. As I stated earlier, you must monitor these people very closely and be certain that the problem isn't chronic!

I regularly see isolated incidents of an outlook problem when I'm looking at a client development organization but there's no way that I can stretch this problem and call it isolated. You have a serious problem and need to find the cause. Unfortunately, I'm not always able to determine the cause for you. I suggest that you ask for some specific coaching and management training to help you cure this cancer before it infects and disables others in your organization.

EXCUSE MAKING

Pam seems to be the only one making excuses when the desired results aren't obtained.

When people make excuses, they're actually selling themselves short. When you accept their excuses you're selling them short because they'll find it even easier to use the same excuse again. Whether they blame you, the company, their competition, the economy, the marketplace, your price or any other external factor, the bottom line is that they aren't taking full responsibility for their outcomes. Effective immediately, you must stop accepting any excuse of any kind, from anyone, at any time, or for any reason - even if it has a shred of validity to it! Instead, begin raising their expectations by asking, "If you couldn't use that excuse, what could you have done differently to overcome that obstacle and get the business?" This strategy empowers people and forces them to hang in there and work harder or smarter while knowing that you won't accept that excuse ever again. Later in my commentary you'll learn which people have the most potential for growth. It's important to know that real growth and change may not occur until an individual stops making excuses and takes responsibility for their weaknesses.

Pam seems to be the only one that will blame either the economy or the marketplace.

When people blame external elements they aren't likely to do anything that would change their effectiveness. When you prevent them from using that specific excuse they will focus on how to overcome a perceived obstacle instead of giving in to a perceived condition.

NAME	Makes Excuses	Blames the Economy	Blames your Company	Blames the Competition
Pam	✓	✓		

COMMITMENT

Richard and Pam both lack commitment toward personal success in client development.

Most people believe that their commitment is quite strong and many more are very loyal to their employers and customers. The problem that I have discovered here is one of conditional commitment. This means committed...but only as long as it's not too difficult or scary, with no discomfort or disagreement in principle with what they must do. Full, unconditional commitment means doing whatever it takes to succeed, no matter what! Sometimes, lack of commitment is a problem because people don't have anything to which they can commit. Either they don't have great personal goals or the ones they have don't motivate them enough to make a strong commitment. Remember, the company's goals (\$nnn,nnn.nn per week or month) for which they're accountable will never be as motivating (or as demanding) as the goals they will set for themselves. Income and sales goals should be replaced by goals for material things as well as life long dreams. These goals and dreams require your people to generate substantially more business in order to earn the income necessary for fulfillment.

Richard will actually admit to the lack of commitment.

I don't think that it's a particularly good thing when someone admits to a lack of commitment. But it is one step better than denying it.

Pam probably won't believe that there is a lack of commitment.

When a large percentage of people lack commitment like they do here, it is something about which we should be very concerned. Your group has a technical background and more than a third of them are either new to client development or your company. It isn't terribly unusual for those people to have this problem. A company's compensation plan is often responsible. If there isn't an incentive to earn the bulk of one's required income in commissions, it can affect commitment. When I can't pinpoint the problem my next step would be to ask about your working environment and whether anything related to that could be responsible for the lack of commitment.

DESIRE

Richard is the only one that lacks desire to achieve greater success in client development.

It's extremely difficult to motivate people that either lack or no longer have the passion necessary for greater success in client development. If someone is committed but lacks desire it means that their "bar" is lower than yours or mine. They're committed to reaching their goals but their goals aren't as grand as yours or mine. In some cases, they may be less than their goals from earlier in their career. Goal setting is the most effective way of increasing desire, even when it means starting the goal setting process over again. That becomes necessary when an individual's goals don't provide enough motivation. When someone has had success in the past, already acquired everything he wants or never really wanted much, they are candidates to begin the goal setting process from scratch. If these people don't become excited they won't change what they're doing. Desire is the most important element for determining whether or not an individual has potential for growth.

Richard will admit to having lack of desire.

When someone admits to having a lack of desire it's almost like they're saying, "yeah, I don't care that much about being more successful." Now I don't know about you, but I don't think I'd want people like that working for me.

You and Chris would both be motivated if you had more competition.

I don't believe that competition motivates the masses. It's not for everyone. However, when someone does respond it must be an on-going process. For good people, the challenge is to find strong competition. For weaker people, strong competition will demotivate them. Therefore, the competition must become slightly better as they begin to improve.

Richard, Pam and William are all not motivated by the usual things.

Not money, recognition or competition. None of these three will create motivation. If your top producers can't be motivated any more, they won't have the incentive to achieve your desired results. If this applies to your weaker people then you should know that they probably won't become stronger. If your middle of the road people are named here they will probably stay as they are - living examples of mediocrity.

SUMMARY OF CRUCIAL ELEMENTS

I've just completed the first four categories, which also happen to be the four most crucial categories. It doesn't look like you have a very big problem with lack of desire in your client development organization but I am concerned with some of your people.

Richard and Pam both had their names come up several times.

Pam lacks commitment and has an outlook problem.

Richard lacks desire and commitment and has an outlook problem.

Combinations of weaknesses in the crucial elements can mean many different things. They sometimes indicate recent developments. When the combination involves lack of desire or commitment, it usually indicates that the person doesn't really care about becoming more successful in client development - unless it's client development on that individual's terms - client development as that person thinks it should be. In most cases, this rarely works!

NAME	Lack of Desire	Lack of Commitment	Outlook Problem	Excuse Making
You			✓	
Richard	✓	✓	✓	
Pam		✓	✓	✓

SATISFIED WITH INCOME

Richard and Chris are both not motivated to increase their incomes at this time.

When people aren't money motivated their desire to achieve additional success in client development can be affected. You can encourage them to set greater personal goals that would require a great deal of money. These individuals often lack the incentive to find new business. If they are good at servicing accounts it makes sense to offer a modest salary for providing service only. In the past 25 years, I haven't seen a truly successful client development person that wasn't tremendously money motivated.

NEED FOR APPROVAL

You, Richard, Pam, William and Chris are all burdened with a need for approval.

When your people need approval from their prospects, they will be unable to close effectively. They probably focus on comments like, "we really appreciate what you did for us" instead of on getting the business closed. They usually find it difficult to ask tough questions because they're afraid that their prospect may get upset with them. They tend to be very non-confrontational so they would more likely waste time with a prospect that has lied than ask the prospect why they were being mis-led. You can help them begin the long process of overcoming their need for approval by reminding them, on a daily basis, that it doesn't matter what their prospects think or say about them. Ask them to get their prospects to respect them rather than needing their prospects to like them. Remind them early in the morning, every single day, that they can make plenty of friends away from work. They are likely to accept "maybes" instead of "noes," because to them, a "no" means that they didn't get their prospect's approval. You must assure them that while it's OK to come back with a "no" they must ask "why" and attempt to turn it around. If you can empower them to take "noes" instead of "maybes" they will stop wasting time, become much stronger and significantly shorten their sell cycle!

Since you have this need for approval too, I don't believe that you'll be able to provide the help that your client development group will need in order to overcome it. Need for approval is the most difficult of all the weakness when it comes to helping people overcome it. It usually takes at least eight months before need for approval can be controlled.

EMOTIONALLY INVOLVED

Richard, Pam and William are all having difficulty controlling their emotions.

While this may seem like an alarmingly high percentage of people to have this weakness, it's not that unusual when a large percentage of people are either new to client development or their company. While this explains the problem, it doesn't remedy the situation. You can begin to do that by providing quality professional skills training and requiring your people to practice for a minimum of thirty minutes per day.

People that have a tendency to become emotionally involved tend to be worriers, often strategize on the fly, are excitable, creative, or analytical. After a client development call you might hear them say, "Oh jeez! I should have said..." They weren't able to execute during the call because they were caught off guard and became emotionally involved. A prospect asked a question or raised an objection that they weren't expecting. Panicking for a moment, they began to think about how they would handle the obstacle. Thinking is actually the process of talking to yourself. When your people talk to themselves they can't effectively listen to their prospect. This causes them to lose objectivity and then control that will usually lead to an unfavorable outcome. You must help them control their mind clutter. Encourage them to relax and have more fun during their calls while trusting their ability to say and do the right thing at the right time.

SLOW TO DEVELOP RELATIONSHIPS

You, Richard, William and Chris all need to become more effective at quickly establishing bonding and rapport.

This is actually surprising! Usually when most of the organization has need for approval, we can expect them to excel when it comes to developing instant bonding and rapport, but that's not the way it worked out with your group! It should however, be something that they can overcome with more ease than some of the other problems we found.

Bonding with a prospect is essential to every client development process. While some of your people have developed strong relationships with their customers, bonding is not being established early enough in the client development process. A person's client development skills are most effective when the prospect is comfortable, relaxed, trusting and open. The questions and answers most important for a favorable outcome will often take place during the first call. If bonding hasn't been firmly established the prospect could be much less cooperative. Some people don't have any client development skills other than their

ability to develop strong relationships. A professional must be able to establish bonding and use their honed client development skills. When this is done effectively and consistently it will usually shorten the client development cycle by eliminating wasted time.

SELLING SYSTEM

You, Richard, Pam, William and Chris all need a more effective client development system or one that's more effective than the one that you are currently using.

Without a common client development system, each person speaks a different language. When you must manage multiple processes you waste precious time and could find things becoming overly complicated. An effective system can assure a favorable outcome while generally preventing your people from wasting valuable time in a sell cycle that is much too long. Without a doubt, a more powerful system, with clearly defined steps, will provide more consistent, predictable and profitable results.

The problems I found common to your people were:

- Inappropriate quotes (could be bids or proposals)
- Inappropriate follow-up calls with prospects
- Too much talking and not enough asking questions
- Too much assuming and not enough probing for information
- Not getting real budgets early in the selling process
- Lots of put-offs, stalls and excuses being accepted
- Your people are not getting commitments from their prospects
- Inappropriate presentations (could be demonstrations)
- The sell cycle being dragged on far longer than necessary
- Ineffective prospecting for appointments

SELLING VALUE

Today, most companies are seeing their products and services shopped like commodities. In order to preserve margins, retain old accounts and close new ones, it is more important than ever for your people to differentiate your company from your competitors. They must be able to masterfully sell value and this requires advanced client development skills.

Most of your people have client development skills which are well below average. Your people need tremendous help with the basics. Without a doubt, Richard has the best skills. You have to keep in mind that skills alone do not necessarily correlate with results. Results can be predicted only after we weigh their weaknesses against their skills.

As an example, you'll see that Pam has many more weaknesses, many of them major - the results won't be as good as they will for you who has fewer major weaknesses and should be able to execute more effectively and more consistently. Anyway, Powers Training & Development should be able to help greatly in this area.

SELF-LIMITING RECORD COLLECTIONS

This weakness often shows the "cause" in cause and effect.

You, Richard, Pam, William and Chris all have self-limiting record collections.

The self-limiting records predetermine actions and outcomes. When you read the self-limiting records in their collections you'll understand why they are often doomed for failure before they speak to a prospect. Their self-limiting records must be replaced with supportive records which, when acted upon, produce favorable outcomes. They can begin by recognizing the current outcome from each self-limiting record and then determining the preferred outcome instead. Then they should write a supportive record which, if followed, would lead to the outcome they prefer. They should record their rewritten record collection on a cassette tape and listen to it repeatedly for about three months!

You might find some of the answers you've been searching for here. In section two of this overview you'll find the strength and weakness summaries. On page two of each summary you'll find the self-limiting records for each person. While most of them aren't terrible, they don't support the client development process, as we know it. Before you can effectively change your people's actions you must change their beliefs. This is one of the areas to begin the process of improving the client development organization.

Bill, you're going to see your name appear more often than you might like in the following chart. Allow me to explain what this means before you get there! Based on your answers, we identified some of the beliefs that you hold true and some of the practices that you do and don't follow. This doesn't make you a bad person or

Overview for The Company

a bad manager. It just suggests that there are some "records" which, if modified, may produce a significantly better outcome. So please, take them in a positive way as you imagine how much more productive you and your sales organization could be with some subtle changes in mind-set.

Self-Limiting Records Among Your Sales People

A thousand dollars is a lot of money	Pam and William
It's OK if my prospect shops around	William and Chris
It's OK if they think it over	Richard
I should have the best price	Pam and William
I must educate the prospect	Richard
Money isn't that important to me	Richard, Pam, William and Chris
I must dominate the conversation	Pam
I must make presentations	Pam
I must make proposals	Richard, Pam, William and Chris
Selling isn't fun	Richard, Pam and William
It's impolite to talk about their money	Richard, Pam and William
Prospects are honest	Richard, Pam, William and Chris
Prospects that think it over will eventually buy from me	Richard, Pam and Chris
It's not OK to confront a prospect	William and Chris
I should spend measurable time with prospects that don't buy from me	Richard and Chris
Any lack of results are due to the economy or marketplace	Pam
I'm able to live comfortably on my income	Chris

Self-Limiting Records Among Your Sales Managers

I don't need to manage my people's behavior	You
I don't need to know what motivates my people	You
I don't need everyone to perform at their best	You
I don't need to upgrade the sales force	You
I have to call on purchasing agents prior to end users or decision-makers	You
Prospects are honest	You
My salespeople need to present information to their prospects when asked	You

NON-SUPPORTIVE BUY CYCLES

Richard, Pam and William all have buy cycles that don't support the client development process.

Understanding this weakness requires a tremendous degree of open-mindedness on the part of you and your people. It is an extremely powerful weakness but very difficult to accept. While everyone will agree with the reporting of "how" they buy, it often takes some time before they understand and accept the impact that buy cycle has on the way they develop business.

Buy Cycle refers to the process by which your people make purchases for themselves. They will tolerate behavior from their prospects when it is similar to their own. A buy cycle that fails to mirror a proper client development process causes many of the obstacles your people have been unable to handle. Despite your attempts to tell them what they should do in these situations, they continue to say or do things that don't achieve the desired outcome. As the individual evaluations show, in much greater detail, a lousy buy cycle makes a person more vulnerable to stalls, put offs, lies, excuses, sob stories and other forms of "think it overs." Procrastinators, price shoppers, comparison shoppers, researchers and price objectors can also have their way. The only solution to this problem is to change the way your people make a purchase. Finally, when their buy cycles support the client development process, the stalls and put-offs that used to derail their process will become momentary delays in a single client development call.

VULNERABLE TO PROSPECTS THAT THINK THINGS OVER

Richard is especially vulnerable to prospects that wish to think things over.

People that have this weakness agree with the prospect's reasons for wishing to think things over. Therefore, the prospect's wish is granted, business is either lost or delayed and the person wastes a tremendous amount of time performing unnecessary follow-up.

VULNERABLE TO PROSPECTS THAT COMPARISON SHOP

Richard, Pam, William and Chris are all vulnerable to prospects that wish to comparison shop.

People with this weakness understand their prospect's reasons for shopping around. Therefore, these people will end up in more competitive situations and be less effective overcoming this obstacle than others might be.

VULNERABLE TO PROSPECTS THAT PRICE SHOP

Pam and William are both vulnerable to prospects that wish to shop for the lowest price.

People with this weakness understand their prospect's reasons for wanting the lowest price. They are the more likely to sell at the lowest margins and lose business to the competition because of price.

LOW MONEY TOLERANCE

Pam and William are both vulnerable to prospects who could spend a lot of money.

People with this weakness view prospects that could spend a lot of money as big opportunities. Unfortunately, their potential to spend money is unrelated to whether or not the prospect is either good or qualified. In addition, people will often invest extra time on these prospects to the exclusion of their other customers and prospects. If a person is in awe of the potential investment a prospect could make and the prospect eventually says, "that's a lot of money" the client

development person understands and is not able to overcome that challenge. If you want to change your people's results you'll have to get them to change their perception of how much money constitutes a lot of money.

There appear to be many areas in the client development process where your people are getting stuck, accepting stalls, put offs or excuses. After reading about their non-supportive buy cycles you should have a much better handle on - not why it's happening - but why they aren't overcoming it! Buy cycle is the weakness that is easiest to overcome. However, until your people completely change the way they buy things the resulting problems will persist. It may also help you to remember that their understanding of the buy cycle problem is not an acceptable substitute for changing the non-supportive behavior.

TIP - Ultimately, if you want to change their results, they'll have to change the way they go about buying things for themselves!

NAME	Non-Supportive Buy Cycle	Vulnerable to Think it Overs	Vulnerable to Comparison Shoppers	Vulnerable to Price Shoppers	Low Money Tolerance
Richard	✓	✓	✓		
Pam	✓		✓	✓	✓
William	✓		✓	✓	✓
Chris			✓		

DISCOMFORT TALKING ABOUT MONEY

Richard, Pam, William and Chris all find it difficult to have an in-depth conversation with prospects about their finances.

When people are uncomfortable talking about money they can't ask a prospect how much money he has, where it might be coming from or how to come up with more. Therefore they usually fail to accurately learn how much money a prospect will spend with them. This becomes even more difficult when the prospect is equally uncomfortable. Help your people develop a greater level of comfort with money. It could put an end to misquoting (too high or low), unqualified quoting (there wasn't a chance of winning the business) or neglectful quoting (the prospect was unable or unwilling to buy).

Based on what Harry Powers told me, you're company sells HVAC.

I'm not sure what your thoughts are, but in your business, I believe that it would be quite difficult to consistently succeed with people that are this uncomfortable having in-depth conversations about money. While I may have indicated that some of your people are getting budgets from their prospects, that could be a one-question act. They must become more inquisitive, more creative and more in-depth in their discussions about money.

DIFFICULTY RECOVERING FROM REJECTION

You, Richard, Pam, William and Chris all have a problem with the time it takes to recover from rejection.

When people recover from rejection, the most serious problem is that the rejection sometimes causes "paralysis." People prefer not to begin a process when they think there will be an unpleasant outcome. Therefore, they don't encourage their prospects to say "no" because of the discomfort it creates. The cure for slow rejection recovery is to redefine their objectives. Give them permission to fail by encouraging them to get a "no" when they can't get a "yes." By doing this, they'll succeed either way!

TOO TRUSTING

You, Richard, Pam, William and Chris all have a somewhat idealistic view of your prospects.

Their trust in people will ultimately lead to betrayal by their prospects. Since they've been unable to detect the smoke being blown in their direction you'll have to help them open their eyes. Begin to ask your people some "how do you know that?" or "how do you know they're real?" type questions. Another good question you can ask them is, "why are you doing that?" whenever it's obvious to you that they took a put off that they believed to be a promise, assurance, commitment, or pledge.

GOALS, PLAN AND TRACKING

You, Richard, Pam, William and Chris have all done little to create an effective goals and goals management program.

In most cases these people either don't have any goals or they haven't connected their goals to a goals management plan. This is often the reason for lack of desire

or commitment and it manifests as lack of motivation. In response to the "what do we fix first" question, this is often the best place to start. Have your people identify some things they really want from life, like places they want to see and things they want to have or do. Have them choose the single most exciting one, the one for which they'll walk through walls. Next, they should determine how much it would cost and then set a date. They should settle on no more than four goals to achieve in the next twelve months. Two of the goals should help them move closer to the ultimate dream goal. They should determine the investment required to reach each of the four goals and add the cost to their existing yearly expenses. This shows them how much money they need to earn in the next twelve months. Then they must create a plan which, when followed, reaches their goals. The plan consists of the following: The amount of new business they must find in order to earn that income; The kind of activity required in order to find that new business; The breakdown of that activity to the smallest identifiable piece (how many times do they have to pick up the phone?); and the required activity each day. Now that they know what they have to do each day, to whom will they do it? (Where will they find those prospects?) How are they going to track their efforts on a daily basis in order to assure that they succeed? How will you hold them accountable to those goals, their plan and their tracking?

One of the areas where your company needs help is with its client development practices. Goals and plans are good examples of this. You haven't completed the process of developing specific personal goals and a plan. Therefore, it's not surprising that your people haven't been required to do the same. Although this is a fundamental part of client development, it's also a symbol of the kind of work that you must do in order to get your client development house in order.

TRAINABLE WITH POTENTIAL FOR GROWTH

You, William and Chris all have very realistic potential for client development growth.

You all have strong desire and commitment too. In addition to the above, you should also be able to recognize that William and Chris both have a real good outlook.

These combinations support both growth and change so I expect all of you to benefit from participating in a proper training program.

You and Chris both have good strengths on which to build.

Despite those good strengths you should understand that there are still weaknesses to overcome and those won't disappear overnight.

William has many weaknesses and many of them are major ones.

Expect that it will take a very long time for your people to overcome these weaknesses and please be patient. Now, let's talk about the help your people need in the area of skills training.

Chris must improve the existing set of skills before tackling advanced skills.

You and William both need to develop some fundamental client development strategies.

There is no question at all that with the right training, on-going and conducted regularly, you will see dramatic results and tremendous improvement. The following recommendations are based on four sessions per month. If your training takes place either more or less often, then you'll need to adjust the time line. For instance, if your logistical situation dictates that bi-monthly training is best, you should multiply the number of months I recommend by eight.

Chris will benefit from about twelve months of training.

You and William will both benefit from about twenty-four months of training.

All of the training should have a role-playing component. If your people face and succeed with prospects that, in role-play, are more difficult than any prospect they will face in real life, their client development calls will be much more successful. In addition, I suggest that you make "StarTrack" part of your training program. This software is an excellent coaching tool that not only encourages dialogue

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between a client development person and a manager, but it also tracks and measures a person's growth from training!

You would benefit tremendously from some client development management training. I strongly suggest this to help you build a stronger organization.

LIMITED POTENTIAL FOR GROWTH

Richard and Pam both have limited potential for growth at this time.

Richard lacks desire and commitment and has an outlook problem right now.

Pam lacks commitment and has an outlook problem.

These combinations don't support either growth or change. Therefore, it's not realistic to expect the same or similar results training this group as you'll experience from training the first group. This tells us that there just isn't enough incentive to change. After giving this a lot of thought, here's what I recommend that you do.

Richard and Pam should probably not perform client development work.

When I recommend not including someone in client development it just means that they aren't very well suited for the task and in all probability, don't want to perform client development work anyway. Someone who possesses good technical skills can often be utilized in another capacity.

TRAINING NEEDS

On a one to ten scale, ten meaning that it affects more of your people and one meaning that it affects fewer people, your people need help in the following areas:

Comprehensive Goal Setting Program	10
Creation of Goals Management Plans	10
Improve their Outlook	6
Reprogramming Self-Limiting Record Collections	10
Learning to Control Their Emotions	6
Improve Bravery	10
Overcoming Their Need for Approval	10
Learning to Recover from Rejection	10
Become Comfortable with Financial Conversations	8
Changing Non-Supportive Buy Cycles	6
More Effective Prospecting for More Appointments	6
Improved Questioning Skills	10
Improve Listening Skills	10
Establishing Early Bonding and Rapport	8
Uncovering Real Budgets More Effectively	8
Mastery of a More Powerful Selling System	10
Getting Prospects to Agree to Make Decisions	8
Shortening the Sell Cycle	6
Improve Selling Skills	10
Improve Productivity	10
Better Closing Skills and Execution	8
Eliminate Put-Offs	10
Fewer Inappropriate Time Wasting Decisions	10
Better Understanding of People	4
Organization Skills and Time Management	10
Getting Stronger Appointments	10
Improve Motivation	4
Increase Desire	2
Improve Commitment	4

Final Training Recommendations:

Powers Training & Development has the expertise to help your people in these areas. Our experience with Powers Training & Development has been highly favorable and we recommend that you take advantage of their numerous training and coaching talents.

Summary Chart of Common Weaknesses

NAME	Lack of Goals/Goals Management Plan	Outlook Problem	Makes Excuses	Self-Limiting Record Collection	Gets Emotionally Involved	Need for Approval	Difficulty Recovering From Rejection	The Money Issues	Non-Supportive Buy Cycle	Ineffective Selling System/Skills	Lack of Desire	Lack of Commitment	Not Money Motivated	Too Trusting of Prospects	Limited Potential for Growth	Months of Training	Growth Potential		
You	✓	✓		✓		✓	✓			✓	✓				✓			24	189
Richard	✓	✓		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		18	10
Pam	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓	✓	✓			18	61
William	✓			✓	✓	✓	✓	✓	✓				✓					24	143
Chris	✓			✓		✓	✓		✓	✓		✓	✓					12	112

This chart is intended to be a guide for training and coaching, showing each of the areas we covered in this overview and indicating the areas in which each of your people will require assistance.

Management Summary Chart

NAME

NAME	Ineffective Coaching Skills	Improper Pipeline Management	Ineffective Debriefing Skills	Lack of Attention to Goals	Ineffective Motivation/Recognition	Not Managing Behavior	Not Allowing Mini-Failures	Not Recruiting Effectively	Non-Supportive System/Skills	Not Running Strong Buy Cycle	Self-Limiting Strong Sales Meetings	Need for Approval of Management Records	Limited Management Growth Potential	Not Holding People Accountable
You	✓	✓	✓		✓			✓	✓	✓				

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Tracking - Recommended Beginning Ratings

NAME	Has Goals	Follows Plan	Positive Attitude	Takes Responsibility	Self Confidence	Supportive Records	Controls Emotions	Doesn't Need Approval	Recovers From Rejection	Comfortable Talking About Money	Supportive Buy Cycle	Consistent Prospecting	Effective Decision Makers	Early Bonding/Questioning	Uncovering Actual Budgets	Discovering Why Prospects Buy	Qualified Quotes and Proposals	Gets Commitments	Strong Desire	Strong Commitment	
Richard	3	2	6	8	6	2	6	5	5	3	2	6	6	6	5	2	6	4	3	4	4
Pam	3	2	6	2	6	1	6	6	5	3	4	2	6	4	8	5	4	5	4	8	2
William	3	2	7	8	6	2	5	5	6	3	4	6	6	4	3	3	4	4	4	8	6
Chris	2	2	8	8	6	2	8	5	7	5	6	6	8	5	3	3	6	5	3	6	6

Tracking - Recommended Desired Goals

NAME	Has Goals	Follows Plan	Positive Attitude	Takes Responsibility	Self Confidence	Supportive Records	Controls Emotions	Doesn't Need Approval	Recovers From Rejection	Comfortable Talking About Money	Supportive Buy Cycle	Consistent Prospecting	Effective Decision Makers	Early Bonding/Questioning	Uncovering Actual Budgets	Discovering Why Prospects Buy	Qualified Quotes and Proposals	Gets Commitments	Strong Desire	Strong Commitment	
Richard	4	3	7	9	7	3	7	6	6	4	3	7	7	7	6	3	7	5	4	5	5
Pam	4	3	9	3	9	2	9	9	8	4	6	3	9	6	10	8	6	8	6	10	3
William	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10
Chris	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10

The recommended desired goals have been adjusted to reflect the growth potential for those individuals with limited potential for growth. These values, along with the recommended beginning ratings, should be entered into the Tracking software.

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THE SUBTLE DIFFERENCES BETWEEN SIMILAR FINDINGS

Similarity	Difference
Will Prospect vs. Isn't Prospecting	The person is willing to prospect but hasn't been prospecting. There is probably no one holding him accountable for this activity.
Won't Prospect vs. Is Prospecting	The person does not like or want to prospect, but since he is being held accountable, he is making the effort.
Uncomfortable Talking About Money vs. Uncovering Actual Budgets	The person is uncomfortable talking about money but is learning the size of the prospect's budget. However, the person probably won't ask any further questions. For instance, if there isn't a budget, he may have difficulty getting the prospect to establish one. If there isn't enough money in the budget, he will probably have trouble getting the prospect to locate more.
Comfortable Talking about Money vs. Not Uncovering Actual Budget	The person is very comfortable discussing money and how much of it a prospect may have, but he isn't asking the right questions to uncover this information. In this situation it is most likely that the person either does not know the importance or does not understand how to accomplish this step.
Not Finding Out How the Prospect Will Buy vs. Finds Out Why Prospect Will Buy	This is simply a case of <i>how</i> vs. <i>why</i> .
Able to Get Past Secretaries vs. Isn't Prospecting	If the person is held accountable for prospecting activities, he will succeed at getting beyond secretaries.
High Money Tolerance vs. Uncomfortable Talking About Money	The person is capable of selling high-ticket products or services but will be unable to do much more than ask for a budget and the money. There won't be much digging to find more money.
Is Prospecting vs. "I do not like making cold calls" (the self-limiting record)	This is exactly as it seems. The person is doing it but hates it!

WHAT THE PROFILE MEANS

As you recall, your people learned about and rated themselves on eleven of the ingredients that are important for success in business development. As you'll see on the Grow Charts, all of these ingredients are inter-related as follows:

Desire, the single most important element of the eleven, measures a person's passion for success. It also helps to indicate whether the person is motivated to earn additional income. Lack of desire is often responsible when a person avoids activities that aren't enjoyable.

If I indicate that one of your people lack desire you can look to their destination and compass for help. Destination tells us whether they have clear, exciting personal dreams and goals and compass indicates whether or not they are on track to reach them by the desired date. If the destination is not established then it may explain why desire isn't very strong. Desire improves when a person gets excited about a clear destination and recognizes that he can fulfill that dream using his business development career as the vehicle. Beware! If a person already has clear destination yet still lacks desire, the hoped for improvement may not take place.

With a clearly established destination the compass can be set once a realistic plan has been finalized. Now that the person has clear destination and a working plan there is finally something to which he can commit. With a strong commitment to the destination and compass, an exercise program can be established. There is a two-part process consisting of preparation (they know what they have to do) followed by execution (they actually do what their exercise plan calls for). An exercise program is the first step in execution and a critical step for success because it not only calls for consistent prospecting (or in some cases, servicing), but when used effectively, it also predicts future revenue and cash flow.

When exercising is consistent, people begin to see progress on their plan, feel better about their accomplishments, and as a result, their self-image improves. Self-image is the most important part of outlook. Any person that has an outlook problem should be considered a negative influence on the rest of the organization. It is often thought that people with good outlooks will have a positive impact on people with negative outlooks but the opposite always happens. With an improved outlook a person's bravery slowly begins to grow. Record collection and bravery support style. A supportive record collection enables your people to develop and improve their style. This is crucial if your people are to take control of the business development process and execute both new and old techniques.

Satisfaction is an element that should be monitored on a regular basis. You should be wary of any person whose level of satisfaction becomes too high. This is the indicator for contentment, which ultimately has a negative impact on desire.

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A committed person with a strong desire for success, clear destination and properly set compass, a consistent exercise program and supportive record collection, healthy outlook, strong bravery and an effective style will be a winner. These elements are all extremely important but they should not be confused with an individual's characteristics or traits. While characteristics and traits have permanence to them, these elements are actually conditions. As with the weather, conditions can change rapidly! Any person that has not perfected each of these elements yet improves upon them, will see dramatic results. A formula which might explain how things work is: Desire + Commitment = Effort. Consistent effort over time = results.