

# **Management Overview**

## **Evaluation of Your Sales Organization**

**Jun-29-2004**



**OBJECTIVE  
MANAGEMENT  
GROUP, INC.**



Dear John,

Thank you for choosing the Dave Kurlan Sales Force Profile. My goal is to present you with a comprehensive understanding of your sales organization along with instructions to improve their overall effectiveness. After a simple orientation to some basic Dave Kurlan concepts and a thorough review of my commentary, you will understand the specific areas where development will directly improve your people, their manager(s), your sales management processes and your company's sales performance.

The Dave Kurlan Sales Force Profile has been used to analyze hundreds of thousands of salespeople in thousands of companies in North America since 1989. You can trust the results of our evaluation with confidence. It highlights the areas for development that really matter for improved sales results.

**What's In Your Profile:**

1. This **introduction** which includes **important expectations**;
2. Details of **major weakness** within your sales force;
3. Specific **Strengths and Weaknesses** for each of your salespeople;
4. **Growth potential** for each person in 21 key selling areas;
5. Each person's personal sales evaluation;
6. **Key Concepts** which are the foundation of our evaluations;
7. Contradictions between your priorities for the business and your manager's;
8. **Sales Management** issues;
9. Areas where your **salespeople are not comfortable** with your model for success.

**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 succeed consistently.**

The evaluation of your sales organization will help you determine how much more business could be closed and learn why some of that business wasn't generated in the past. As you digest this 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 selling process.

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

### **Managing Your Emotions and Building A Better Sales Force:**

There probably won't be a correlation between those people who possess the greatest potential for growth and your top revenue producers. This happens when your top producers 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 individuals' potential for growth rather than their historical results. Your focus for development must be on growth potential.

As you read the commentary, you may feel some resistance. Resistance will take place any time someone believes that the findings and recommendations differ from his own expectations and/or experiences. When your salespeople review their evaluations, you may see them resist as well, typical when someone finds what they believe to be a "discrepancy" with some aspect of the findings. The substantial amount of experience I have in providing evaluations allows me 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 look at this later.

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, former 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. If you encounter resistance of this type, you may want to ask the following question in your own words: "I get the feeling that you are resisting these findings and defending your turf. How can that behavior possibly help us to move forward?"*

**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 to provide your people with 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 results of actual data provided by your salespeople, 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. Review the evaluations with each of your salespeople. Provide appropriate training and coaching to those salespeople who will respond. Make the recommended changes to your sales 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 this evaluation helps you plan for future sales success, build an improved sales 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 five 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 salesperson to improve, that salesperson must have enough strengths in the area of Desire, Commitment and Outlook.
- 2) Hidden Major Weaknesses – These are powerful weaknesses that are usually hidden from view – both yours and the salesperson’s. These weaknesses, when present in certain combinations, are powerful enough to neutralize *all* of a salesperson’s strengths and skills. I’ll talk more about Need for Approval, Non-Supportive Buy Cycle, Tendency to Become Emotionally Involved, Discomfort Talking About Money and Self-Limiting Record Collection later in my commentary.
- 3) Growth Potential – We measure a salesperson’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 weaknesses common to your people as well as the people who have them. I will isolate the issues that are extremely important and identify individuals that should be singled out for either unusually strong or weak selling characteristics.
- 5) Sales Management Implications – The overview will illustrate those areas crucial to effective sales management that must be improved or changed outright in order to grow the sales organization and reach the potential we have presented.

## **The Rather Obvious Format**

You’ve already realized that the introduction is boilerplate. 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 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 the explanations of the weaknesses never change, I have prewritten those 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.

# Management

## Sales Management Issues



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## **ORGANIZATIONAL GROWTH**

Ed needs to become more effective growing the sales organization.

Growing a sales organization consists of coaching, motivating and recruiting salespeople while holding them accountable for performing at the highest possible levels of achievement. I'll discuss the areas where your manager is falling short.

## **COACHING**

Ed needs to become more effective coaching salespeople.

The process of coaching salespeople consists of an ongoing dialog that includes, but isn't limited to, pre-call strategizing and post-call debriefing with each salesperson. Under ideal conditions, this takes place daily. When managers are not effectively coaching their salespeople it is often because they aren't performing their coaching activities. On rare occasions, well-intentioned managers perform the activities - only poorly.

Ed will agree with the coaching problem.

This means your manager seems to be aware that he may not be effective or consistent with the necessary components of coaching.

You may want to begin coaching this manager, which not only causes you to lead by example, but also demonstrates how to be a more effective coach.

## **MOTIVATING**

Ed needs to become more effective motivating salespeople.

Motivating salespeople is an ongoing process where on those days that a salesperson isn't able to "self-start" the manager can step in and provide an external dose of motivation. Unfortunately, those days are far more common than anyone realizes and a manager can only be effective when aware of what will uniquely motivate each salesperson. The only way to accomplish that is for each salesperson to participate in a structured, professional goal setting program as previously described. Since all goals must be derived from a dream, the manager can utilize the dream as well as the goals to motivate his salespeople.

Ed does not believe there is a problem with motivation.

This conflict with our finding occurs when the number of people who lack goals or a plan is not consistent with their manager's claim to know what motivates the salespeople.

I believe that overall in your company, your manager is not familiar enough with the salespeople's goals and dreams. We know that because a number of your people don't have goals and dreams. If your manager takes the time to get to know the people a little better, they may become more responsive to coaching and accountability. If you really want to generate some growth among these people, this is an easy, yet powerful place to begin. You can begin to solve this problem by privately having discussions about your manager's personal goals and dreams. You'll be surprised at what you might learn.

## **RECRUITING**

Ed needs to become more effective recruiting salespeople.

Recruiting is the ongoing process of identifying, finding, screening, testing, interviewing, hiring and retaining stronger salespeople than those who are currently employed. When turnover is either too high (more than 30%) or too low (less than 20%), recruiting is not optimized. This usually happens when the only recruiting taking place is to replace someone or grow in a specific territory. When "need based" recruiting is performed instead of "plan based" recruiting, a manager will often deal from a position of weakness rather than strength.

"Plan based" recruiting begins with the most important step in the process - the identification of your ideal candidate. Our "Corporate Recruiting Manual for Sales Candidates" can provide more information on the key steps in the recruiting process. When proper time is given to identification, the steps that follow are much more easily implemented.

A common recruiting mistake that managers make is failing to "test" a candidate either prior to the interview, or in some cases, at all. As a result, they "fall in love" with a candidate's personality or experience without regard to whether the candidate will successfully and consistently bring in business. The reverse can be true as well. In the latter case, they don't "hit it off" with a candidate or take issue with the candidate's experience without knowing that the candidate will successfully and consistently bring in business.

Ed does not believe there is a problem with recruiting.

This conflict with our finding occurs when the percentage of new salespeople working at the company is much lower or significantly higher than what we would expect from a manager who was recruiting effectively.

As you'll read in a few pages, we identify people who have limited potential for growth. These are people who have no incentive to change. We identify other people who have many serious major weaknesses. In both cases, there may have been mistakes regarding how long the company should retain people or whether these people should have been

hired in the first place. You can begin raising the bar for the future. This can include a target percentage for forced turnover, improved performance among existing salespeople and stronger new hires.

## **ACCOUNTABILITY**

**Ed needs to become more effective holding salespeople accountable.**

Holding salespeople accountable is perhaps the most feared part of sales management, despite the fact that it isn't very difficult. It requires clear, mutual expectations for each salesperson's required activity on a daily basis. Rather than holding them accountable for a certain volume in a particular reporting period, a manager should hold them accountable for the things they need to do on a daily basis, activities which, if performed, would result in the revenue goals being met.

When a salesperson fails to perform the required behavior, the manager should meet with the salesperson, express disappointment and remind the salesperson that the performance was not acceptable. Next, the manager should make it clear that the salesperson must meet those expectations in the next period and impose a penalty for failure to perform as required in the future. I believe that the manager should use a "three strikes and you're out" philosophy. If the salesperson must be reprimanded three times then the salesperson should be replaced. The most important part of this process is following through. Obviously, this is the part that most managers fear. It's a confrontation, it's necessary and it sends a powerful message. "We will no longer accept mediocrity!"

**Ed will agree with the accountability problem.**

**As you begin to hold a manager more accountable in the area of sales management, I believe you will see a significant improvement and more of a willingness to hold salespeople accountable.**

**When you answered the 17 Priority questions you indicated that sales force automation is a priority. Given the findings and your priority, my next recommendation is a simple way to execute one of your strategies while solving one of the problems I have identified.**

**Based on the leading indicators used in the evaluation of your sales force, it appears that accountability and coaching will continue to be issues that you'll need help with. We suggest that you inquire about SalesTrack, our web based software application that includes excellent tools for holding your salespeople accountable, coaching your salespeople, reporting and tracking their activity, measuring their growth from training, and much more.**

The issues that I spoke about in this section are priority number one. Ask Jim Sasena about acquiring some help in the areas of sales management. There are several areas that are quite important, must be addressed immediately and should be taken very seriously.

When you answered the 17 Priority questions you indicated that developing people is a priority. However, based on the issues identified in this section of the document, management is not capable of supporting that strategy at this time.

ISSUE	Strong	Agrees with Weakness	Does Not Agree with Weakness
Growing		✓	
Coaching		✓	
Motivating			✓
Recruiting			✓
Accountability		✓	

In case you were wondering what it means when I say that a manager will agree with a particular problem or won't believe that there is a problem, I will explain it here.

First, we evaluate a sales manager, based on that manager's input to our questions - His/Her perception of things. Then we look at the sales force and draw conclusions based upon the manager's work with the salespeople - shown above. When our conclusion from looking at the sales force is the same as our conclusion from the sales manager's answers, we indicate that the manager will agree with our findings. When our conclusion from looking at the salespeople is different from the conclusion drawn from the manager's answers, we indicate that the manager will likely not believe that there is a problem. In cases like these, the findings in this section of the Management Overview will conflict with the findings in the Sales Manager's Self-Assessment.

## **MANAGEMENT PRIORITIES**

In this concise, straightforward section, we will present the priorities chosen by your management team and explain the impact of how those priorities affect one another. Of course there are no correct or incorrect priorities, only those that help your company reach its goals. We hope that this information will help your team develop more focus and consistency.

### **In this section we will report:**

- 1) Inconsistencies within each manager's Priorities;
- 2) Impact of those Inconsistencies;
- 3) Presentation of Interpersonal Priorities in 4 Categories;
- 4) Conflicting Priorities Between You and Your Managers;
- 5) Analyses of the Conflicts and the Opportunity at Hand;
- 6) Summary of Priorities;
- 7) The 17 Original Questions (Glossary);
- 8) The criteria for Conflict (Glossary);
- 9) Listing of Questions and Categories (Glossary).

### **Action Required on Your Part:**

Every company has inconsistencies in their Priorities and Priority conflicts between managers, so you shouldn't expect your company to be any different. Plan to take the following action steps after you have reviewed the document:

- 1) Eliminate any inconsistencies within your own set of priorities;
- 2) Have your managers eliminate inconsistencies within their set of priorities;
- 3) Schedule a meeting with Jim Sasena and your management team to discuss the conflicts between your priorities for the company and theirs;
- 4) Determine why the conflicts exist: Is it due to poor communication, lack of direction, lack of follow through, lack of focus, neglect or ambivalence?
- 5) Don't assume that your priorities are correct and that theirs are incorrect;
- 6) Gain agreement on each of the 17 priorities with an understanding that there may be situations where different priorities are appropriate for different managers;
- 7) Have each manager indicate those priorities that are relevant to them.
- 8) Request from each manager a plan that states how they will achieve the relevant priorities;
- 9) Hold each manager accountable to their plans;
- 10) If you haven't already done so, have your sales force evaluated. Jim Sasena can help with this step.

As important as it is to focus on the areas of the sales organization that need your attention, it's also an opportune time to include the various priorities of the sales management team. We have compared your priorities in seventeen important areas to those of each sales manager. We will explore two different sets of conflicts, personal conflicts (those within your own priority profile) and interpersonal conflicts (those between you and a sales manager). We present our findings to you here.

## **Potential Conflicting Priorities**

Prior to aligning the priorities between you and your managers, you should resolve any conflicts you have within your own set of priorities. In doing this you may eliminate some of the existing conflicts between you and your managers as well as solidifying your own priorities. Therefore, we will list any personal inconsistencies (if any) and discuss their impact. Then we will review how well your priorities match up with your managers in three major categories.

### **Account Development and Customer Financial Profile**

The following issue pertains to You.

You indicated that your account development priority is PROFIT and your financial priority for a potential customer is their POTENTIAL VOLUME. Most volume contracts start with low profit and only become profitable when the projected volume is realized. Some opportunities may be profitable but do not deliver any significant volume (margin dollars). These two priorities are in serious conflict. (Question 1 Answer B and Question 2 Answer A)

### **Competition and Customer Financial Profile**

The following issue pertains to You.

When you prefer customers that provide POTENTIAL VOLUME and you intend to HOLD FIRM ON PRICE, these may be inconsistent strategies. Often volume opportunities require up front costs which make the short-term profits unattractive. If you have large fixed costs in your business model, volume rather than price (profit) may be the only win for you and your customers. (Question 2 Answer A and Question 16 Answer C)

## Development and Training

The following issue pertains to Ed.

When you intend to use OUTSIDE TRAINING but you intend to REPLACE NON PERFORMERS, make sure to invest in those who can grow and develop instead of training everyone. If you find that you must rebuild your sales organization, it may be wise to invest some of your training dollars in a strong recruiting program. (Question 6 Answer A and Question 8 Answer B)

## Growth and Customer Financial Profile

The following issue pertains to You.

You indicated that you prefer customers that offer POTENTIAL VOLUME and you intend to grow by GROWING EXISTING ACCOUNTS. Customers with potential volume often require upfront investments. It may not be possible to grow your existing customers while investing in the upfront costs of new customers. (Question 2 Answer A and Question 15 Answer B)

## Marketing and Trade Shows

The following issue pertains to You and Ed.

When marketing must CREATE LEADS with MINIMAL PARTICIPATION IN TRADE SHOWS, make sure your absence at key trade shows is not hampering your ability to generate targeted leads. You will have to invest in other lead generation activities which may not generate the same benefits as trade show participation. (Question 12 Answer A and Question 11 Answer C)

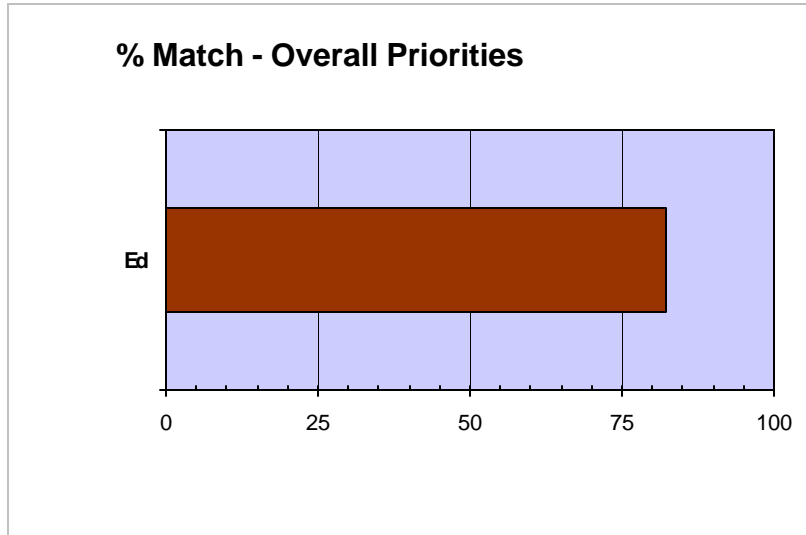
## Summary of Priorities

The following chart shows the answers that each of you provided for the seventeen questions to make it easier to see the conflicts. The questions and possible answers can be referred to near the end of this commentary.

NAME	1. Account & Customers	2. Financial Profile	3. Business Plan	4. Sales Manager's Role	5. Recruiting	6. Training	7. Sales Compensation	8. Developing Employees	9. Sales Force Automation	10. Market Strategy	11. Trade Shows	12. Role of Marketing	13. Reaching Clients	14. Company Identity	15. Business Growth	16. Price Competition	17. Role of Internet	Match %
You	B	A	B	C	C	A	B	A	B	A	C	A	B	C	B	C	B	
Ed	B	B*	B	C	A*	A	B	B*	B	A	C	A	B	C	B	C	B	82%

## Interpersonal Priorities

### Overall Priorities:



The following analysis applies to Ed at 82%

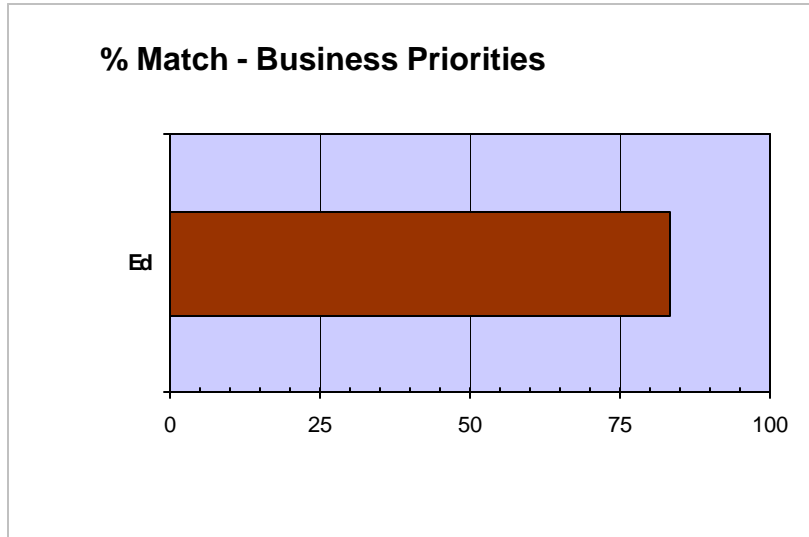
#### **ANALYSIS:**

This suggests that when it comes to the corporate vision you are both on the same page more often than not.

#### **OPPORTUNITY:**

Since so many of the priorities are currently in sync, there is a tremendous opportunity to move to the next level. While there is commonality from a conceptual standpoint, results are achieved when concepts and strategies are actually executed. Use this analysis as an excuse for holding this manager accountable for the execution of these strategies. Ask for plans that detail how these strategies will be accomplished. At the same time, you can discuss the remaining strategies that are not yet in sync (if any) and develop the plans for them as well.

**Business Priorities:**



The following analysis applies to Ed at 83%

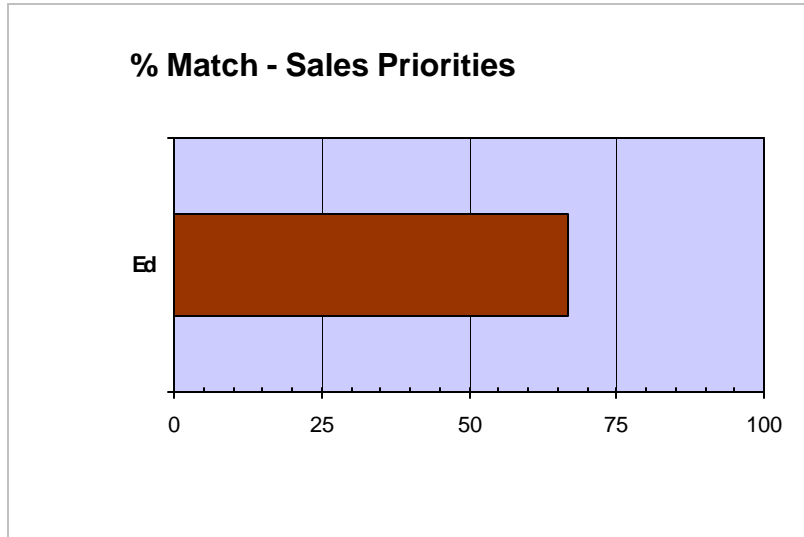
**ANALYSIS:**

Business strategies are the backbone for a growing business and even if a manager is consumed with sales issues most of the time, it's very encouraging that your company's strategic goals of the company have been adopted. This would suggest that you have a more integrated approach to sales development.

**OPPORTUNITY:**

When a manager understands not only what is required from a sales perspective but embraces the bigger picture business strategies as well, it can help that manager to be much more effective. You should be certain that these strategies are not only being shared conceptually, but are being executed as well. Review the plans for achieving the results of these strategies with this manager at your next meeting.

**Sales Priorities:**



The following analysis applies to Ed at 67%

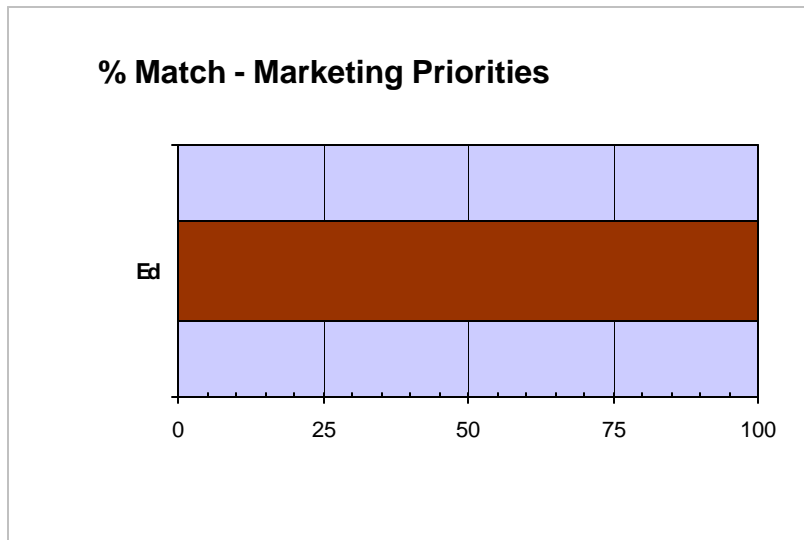
**ANALYSIS:**

Since our Management Overview focuses primarily on sales, sales management and sales development, I should rant and rave about this discrepancy. Every company is different, so I can't pretend to know WHICH priorities are best for your company or WHOSE priorities should be adopted. However, I can suggest that regardless of who has a better handle on how your company should proceed in these areas, there is no time like the present to sort those differences out.

**OPPORTUNITY:**

You have a tremendous opportunity to turn confusion into a structured plan. If you take the necessary time to choose and communicate appropriate priorities in each of the conflicting sales areas, the resulting unified sales approach should create stronger overall conviction from the sales organization. That foundation should support any sales development/training/coaching that takes place.

**Marketing Priorities:**



When you answered the 17 Priority questions you indicated that expanding your market is a priority. However, based on our skill set findings, your company does not have enough hunters, qualifiers and closers to support this strategy at this time.

When you answered the 17 Priority questions you indicated that participating in trade shows is a priority. However, based on our skill set findings, your company does not have enough farmers, qualifiers and ambassadors to support this strategy at this time.

The following analysis applies to Ed at 100%

**ANALYSIS:**

Every company is different and not all sales managers have or even care about marketing input so it is very fortunate when you have a manager who does both.

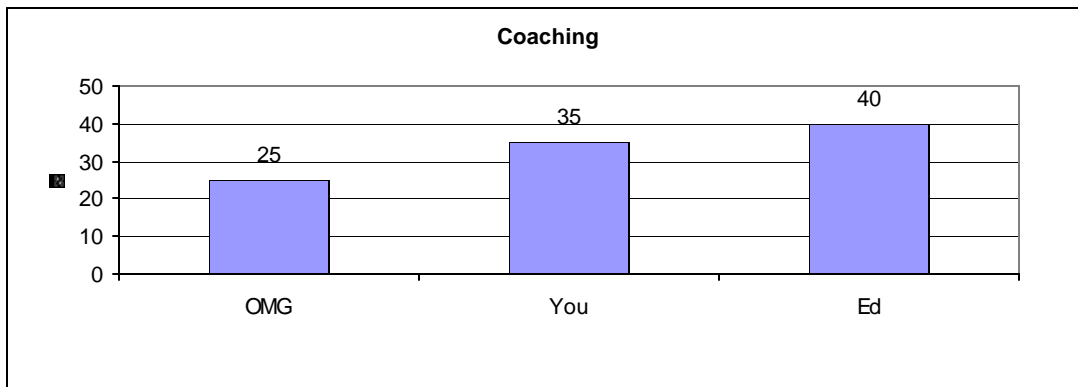
**OPPORTUNITY:**

Nothing is more important to the sales effort than a marketing program that is fully integrated with the company's sales strategies. Since it is so easy to lose sight of the marketing goal, review the marketing priorities and make sure they are being executed in the spirit of the plan.

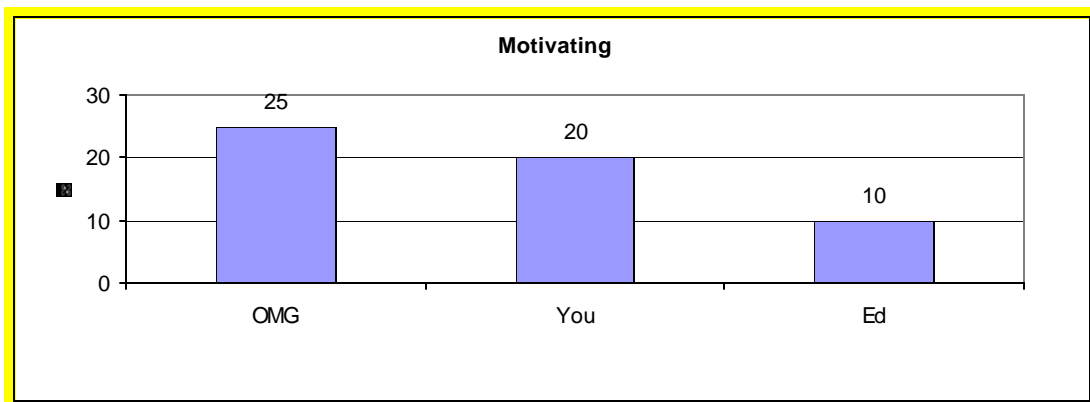
## Sales Management Activity Priorities

Each manager was asked to provide us with the approximate amount of time being invested in 10 important sales management functions. Over the next several pages, we will share those percentages, compare them to the ideal percentages that we recommend, and comment where appropriate. There is no right or wrong in this section, so it should be used as a reality check, to help you determine whether your managers are spending enough time on the issues that will generate revenue and develop people.

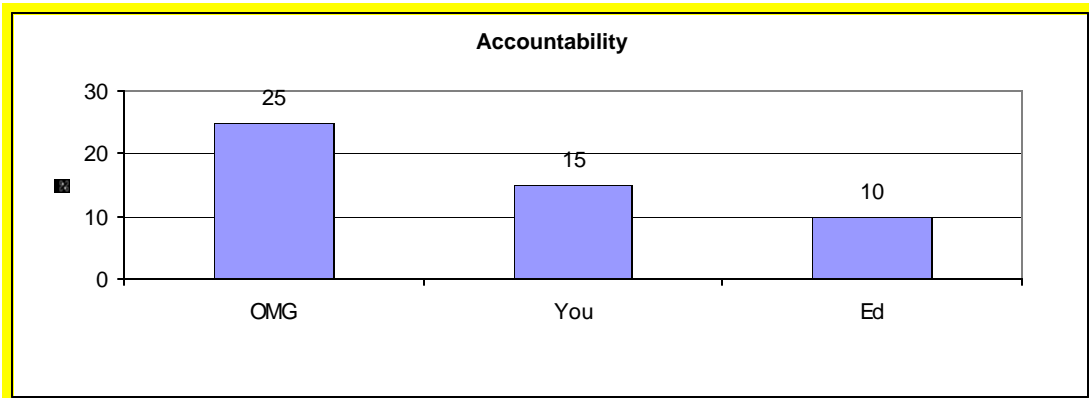
### Percentage of Time - Coaching



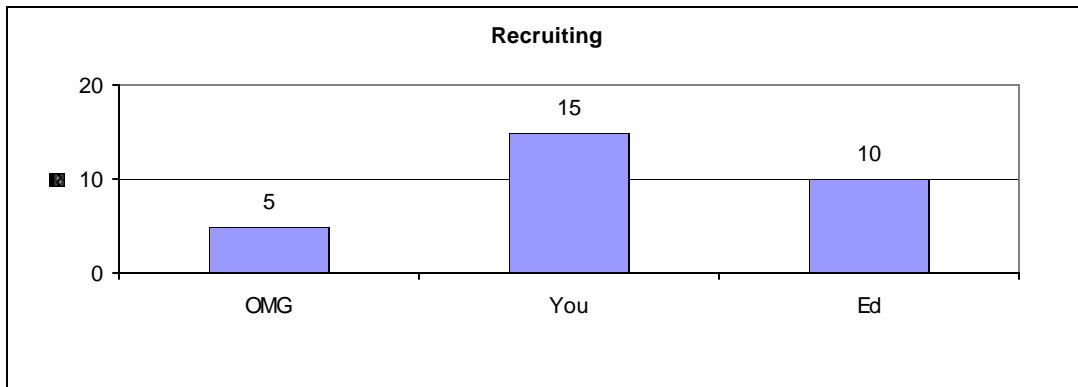
### Percentage of Time - Motivating



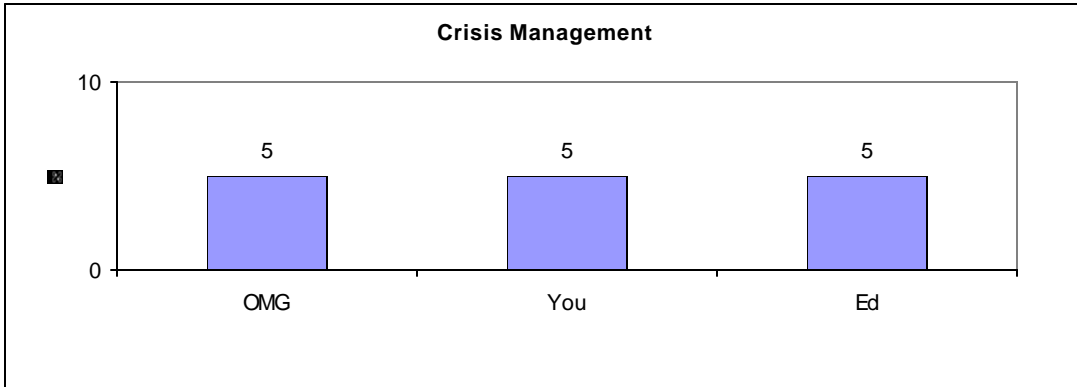
**Percentage of Time - Accountability**



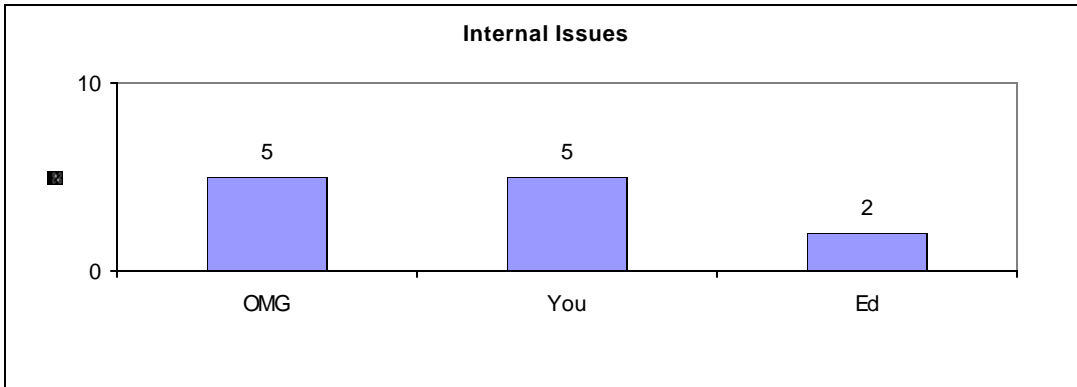
**Percentage of Time - Recruiting**



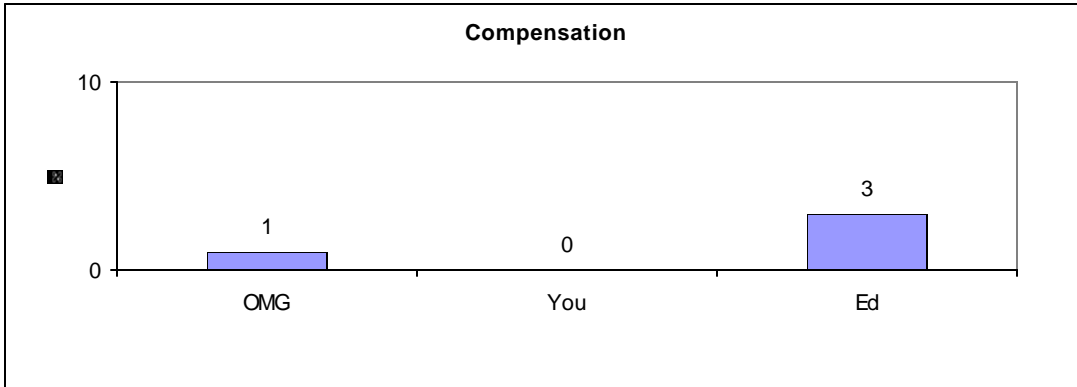
**Percentage of Time - Crisis Management**



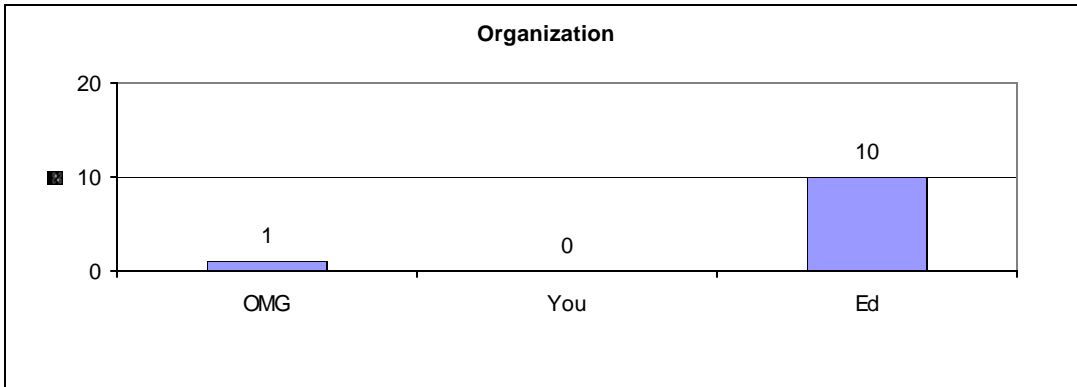
**Percentage of Time - Internal Issues**



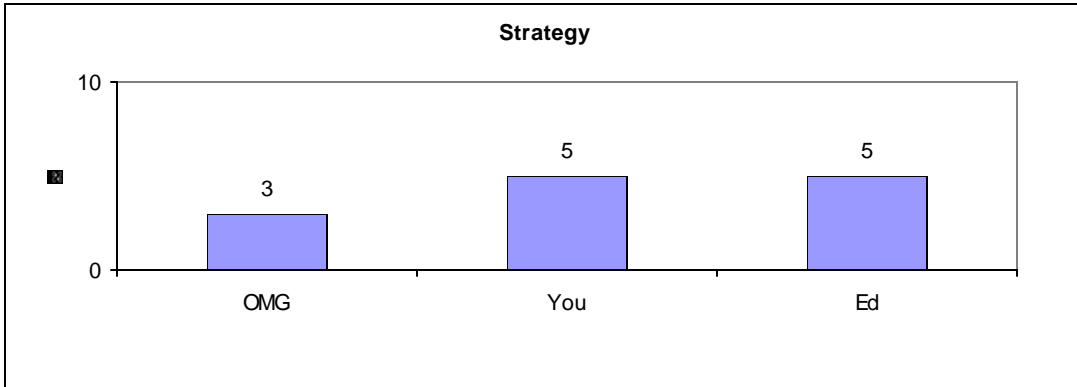
**Percentage of Time - Compensation**



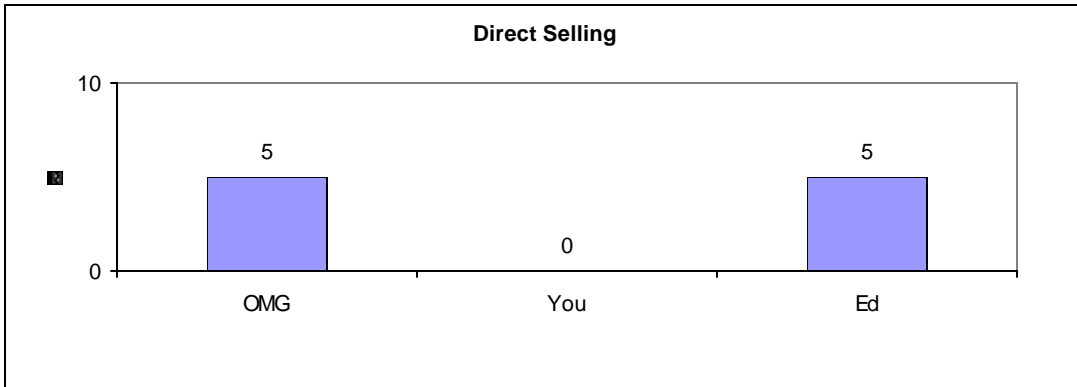
**Percentage of Time - Organization**



**Percentage of Time - Strategy**



**Percentage of Time - Direct Selling**



**Summary of Time Percentages**

NAME	Coaching	Motivating	Accountability	Recruiting	Total Key Management Functions	Crisis Management	Internal Issues	Compensation	Organization	Strategy	Direct Selling	Total Other Functions
	OMG	25	25	25	5	80	5	5	1	1	3	5
You	35	20	15	15	85	5	5	0	0	5	0	15
Ed	40	10	10	10	70	5	2	3	10	5	5	30

**Note Pertaining To: You and Ed**

Based on an analysis of the time allocated to the ten various sales management functions, we believe that the time is being allocated properly and major changes do not need to be made at this time.

**DISCOMFORT**

You might recall completing a profile where you identified what a successful salesperson must do in your business in order to be truly successful. In this section we identify your salespeople who are not totally comfortable with your criteria.

**These Are The Areas In Your Ideal Selling Environment Where Your Salespeople Are Not Totally Comfortable**

UNCOMFORTABLE WITH <b>MANAGEMENT ISSUES</b>	
With Moderate Pressure From Management	Larry
With Little Management	Dawn
Being Compensated Mostly by Salary	Dawn, Larry and Norman
In An Environment With a Lot of Rapid Growth and Expansion	Georgia and Norman
In An Environment That is Calm and Stable	Dawn and Larry
UNCOMFORTABLE WITH <b>MARKET ISSUES</b>	
Calling on Corporate and Industrial Prospects and Customers	Dawn
Calling on Presidents and Owners of Companies	Dawn and Greg
Having to Compete Against a Few Competitors	Larry and Georgia
UNCOMFORTABLE WITH <b>PRODUCT / SERVICE ISSUES</b>	
Asking For Sums of Money That Are More Than \$250,000	Norman
Selling Conceptual Services	Dawn
Selling Products or Services That are in the Middle of the Pack	Dawn, Larry, Georgia and Norman
UNCOMFORTABLE WITH <b>PERFORMANCE ISSUES</b>	
With a Sell Cycle That Takes 3-6 Months	Dawn, Larry, Georgia and Norman
Selling Customers and Then Renewing Them Each Year	Dawn and Norman
Selling Customers and Then Moving On or Renewing Them Annually	Greg and Larry

Overview for ABC Company

Splitting the Time Between Selling New Accounts and Servicing Existing Accounts	Larry, Georgia and Norman
Making a Single Presentation to a Group	Dawn, Greg, Larry and Norman

When the percentage of people who have discomfort with your criteria for success is this large, it can be quite easy to excuse it by saying that your criteria must be unrealistic. However, I believe your criteria are fine and this is more of a reflection on your hiring criteria. This is proof positive that your company has been hiring the wrong people for its sales positions.

# **Management Overview**

## **Pipeline Analysis**

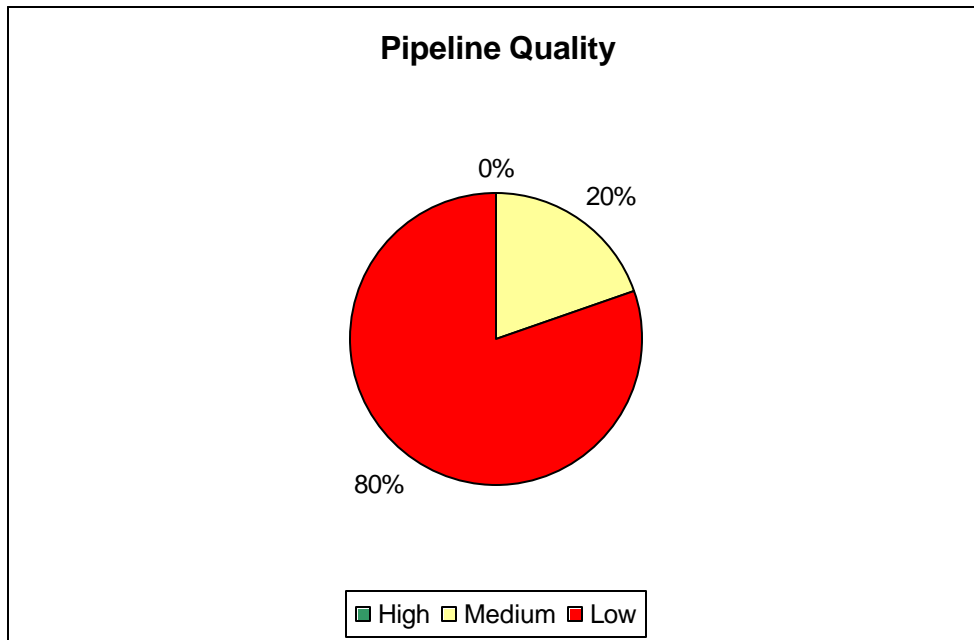


**OBJECTIVE  
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**PIPELINE ANALYSIS**

Your salespeople answered our questions about their pipelines and based upon those answers we would like to provide you with some timely and insightful feedback about the condition of your group’s pipeline. Our commentary is based on data from only those prospects on which your salespeople chose to provide feedback. If the prospects are representative of the majority of their prospects, then this commentary should be used to address the issues brought out here. If the prospects are not representative, the commentary can be used to focus attention on some key areas.

The overall condition of your pipeline appears to be quite poor. The poor quality of the information your salespeople have about their prospects, the lack of intelligence about their competition, the lack of agreements and understandings they have received from their prospects and the likelihood of closing these prospects are all poor.



## **ANALYSIS OF HIGH IMPACT FACTORS**

Of the nineteen questions that are asked, six of them are highly significant because of their constant impact on the likelihood of success. We have described those six questions and their impact on your selling process below:

- **Quote is for final decision maker** (Question 1) – when the quote or proposal is prepared for the final decision maker, there is a much higher likelihood of closing success. Your salespeople answered yes to this question 60% of the time. Since your salespeople seem to be accomplishing this, it's fair to assume that if they are asking the right questions of this individual, the solutions being presented in the quotes or proposals are being met with satisfaction by the decision maker.
- **Decision promised upon delivery of quote** (Question 2) – When there is an agreement in place for a decision at the time of delivery, the likelihood of success is much greater. Your salespeople answered yes to this question 20% of the time. When your salespeople don't get their prospect to agree to make a decision at the time they are presenting their proposal or quote, they are setting the stage for "think it over", put offs, stalls and objections. Most importantly, they won't learn why the prospect hasn't said "yes" because the prospect wasn't expected to say "yes" or "no". These failures all lead to a longer sell cycle, wasted time and missed opportunities.
- **The prospect is committed to buying from someone** (Question 10) – If the prospect hasn't made a commitment to purchase from somebody, there is a good chance that they may not purchase at all. Your salespeople answered yes to this question 30% of the time. Since your salespeople are not learning this important piece of information, their competition for the business increases by one. They are not only competing against other vendors, but also with prospects who may not do anything at all. There is significantly less leverage for salespeople who have not gotten their prospects to commit to somebody's solution and you should have far less confidence in an acceptable outcome.
- **The prospect has the money** (Question 11) – The most common obstacle to closing is when salespeople present a solution that the prospect can't afford to implement. Your salespeople answered yes to this question 60% of the time. Your salespeople seem to be doing a good job in this area. This also indicates that they would not have a problem with under presenting their solutions either. Since so few salespeople accomplish this step effectively, it gives your company a clear advantage each time there is an opportunity to do business.
- **Product/Service will solve the prospect's problem** (Question 19) – Another common mistake is when salespeople present their solution but it's not the best solution for the prospect. Your salespeople answered yes to this question 100% of the time. Your salespeople seem to have this one under control. The advantage of being strong here is that the likelihood of success is much greater when salespeople get their prospects to validate their thinking along the way. Since most salespeople aren't very effective at this, it gives your company a clear edge.
- **There is dissatisfaction with the current vendor** (Question 15) – if the prospect doesn't have a reason to leave their current vendor all the reasons a salesperson can muster may not tempt the prospect to leave either. Your salespeople answered yes to

this question 10% of the time. Your salespeople are not uncovering this information and the current vendor (or the current way of doing things) is at least a known entity while you, even if you present a better alternative, are the relative unknown. Left uncovered, the edge goes to the incumbent.

## **FACTORS REQUIRING ATTENTION**

There were questions to which your salespeople answered affirmatively less than 50% of the time. It would be helpful to identify the questions listed below that have an impact on the likelihood of success in your business and have your salespeople focus on improving in those areas during the upcoming weeks and months.

2. Decision promised upon delivery of quote
3. Nothing can go wrong
5. The prospective customer is creditworthy
7. It won't upset any existing customers
8. There are no potential headaches
9. They have agreed to buy from us
10. They are committed to buying from someone
12. They know about how much it will cost
13. There isn't any competition
14. There isn't an incumbent vendor
15. There is dissatisfaction with the incumbent vendor
16. They said they'd leave the incumbent
18. They don't need competitive quotes

There are many issues that are consistently being left unresolved. While there may be enough opportunities in your pipeline to bring the necessary business in, much of what is in the pipeline is not qualified to the degree where your salespeople have earned the right to quote or propose a solution and close. The good news is that there are limitless opportunities to improve this process in the future.

Despite management's best efforts, not all salespeople perform equally, and that is especially true in the area of asking tough questions, gathering important information and getting commitments that will lead to sales success. The salespeople named below have average scores of 50% or below indicating their ineffectiveness in these areas.

Dawn scored 37  
Greg scored 46  
Georgia scored 44  
Norman scored 42

**SUMMARY OF PIPELINE INPUTS**

Your salespeople answered nineteen questions about some of the accounts in their pipeline (as many as four accounts). The table below shows for each salesperson the total average score and the average score for each question. The maximum score for the total or any one question is 100. The list of questions is provided below in the section titled “PIPELINE ANALYSIS QUESTIONS”.

NAME	Total Score	Q1	Q2	Q3	Q4	Q5	Q6	Q7	Q8	Q9	Q10	Q11	Q12	Q13	Q14	Q15	Q16	Q17	Q18	Q19
Dawn	37	67	0	33	67	67	67	67	33	33	0	33	33	0	0	0	33	100	33	100
Greg	46	100	100	0	0	100	100	0	0	0	0	100	100	0	0	0	0	100	0	100
Georgia	44	50	0	100	100	50	50	50	0	0	50	100	50	0	0	0	50	50	50	100
Norman	42	50	25	25	50	25	100	25	0	50	50	50	50	25	25	25	25	50	25	100

**DETAILED PIPELINE INPUTS**

Your salespeople answered nineteen questions about some of the accounts in their pipeline (as many as four accounts). The table below shows each account that they used and the resulting score in this analysis. The maximum score for each account is 100. The list of questions is provided below in the next section titled “PIPELINE ANALYSIS QUESTIONS”.

NAME	Company 1	Score	Company 2	Score	Company 3	Score	Company 4	Score
Dawn	Client A	31	Client B	46	Client C	34		
Greg	Prospect	46						
Georgia	Company One	50	Company Two	39				
Norman	Customer A	29	Customer B	54	Customer C	24	Customer D	63

**PIPELINE ANALYSIS QUESTIONS**

<b>Number</b>	<b>Pipeline Question</b>
1	This quote is for the final decision maker
2	Decision promised upon delivery of quote
3	I am prepared for the unexpected
4	It will be profitable at your estimated cost
5	The prospective customer is creditworthy
6	We want this business
7	It won't upset any existing customers
8	There are no potential headaches
9	They have agreed to buy from us
10	They are committed to buying from someone
11	They have the money/funding
12	They know about how much it will cost
13	I've dealt with competitive issues if any
14	There is an incumbent vendor
15	There is dissatisfaction with the incumbent vendor (answer yes if no incumbent)
16	They said they'd leave the incumbent (answer yes if no incumbent)
17	The time frame is appropriate
18	They don't need competitive quotes
19	Our product/service will solve their problem

# **Management Overview**

## **Skill Set Summary**



**OBJECTIVE  
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**SKILL SETS**

We understand that all of the terms we use in the evaluation of your sales force may not be familiar to you so we have cross-referenced them with terms with which you may be more familiar. In the tables that follow, we have included the attributes of sales skill sets collected during the evaluation of your sales force. In each skill set table, we have indicated which attributes each individual possesses as well as the total percentage of attributes in each skill set. Not all of the attributes are “positive. For instance, The Ambassador, on its own, describes an individual who easily makes friends but doesn’t necessarily excel in other areas of sales. We believe the summary that follows can help you understand the makeup of your organization in terms of the roles in which your salespeople can perform. Refer to the references near the end of the document for an explanation of subtle differences between various findings.

Name	Hunter Skill Set								
	Prospects Consistently	Gets Past Secretaries	Gets To Decision Makers	Gets Appointments When Prospecting	Receives Plenty of Introductions	Will Prospect	Has No Need For Approval	Recovers From Rejection	% of Hunter Traits
Larry	✓	✓	✓	✓		✓	✓		75%
Norman	✓	✓		✓		✓			50%
Greg	✓	✓	✓	✓		✓	✓		75%
Georgia	✓	✓	✓	✓	✓	✓	✓		88%
Dawn	✓	✓			✓	✓	✓		63%

**SKILL SETS**

Name	Closer Skill Set									
	Gets Prospect To Agree To Make Decision	Won't Make Inappropriate Quotes	Gets To Decision Makers	Attempts To Close	Has Killer Instinct	Won't Accept PutOffs	Has Supportive Buy Cycle	Has No Need For Approval	Controls Emotions	% of Closer Traits
Larry		✓	✓				✓	✓	✓	56%
Norman	✓			✓					✓	33%
Greg	✓		✓	✓				✓		44%
Georgia			✓					✓		22%
Dawn	✓							✓	✓	33%

**SKILL SETS**

Name	Qualifier Skill Set										
	Uncovers Actual Budget	Gets To Decision Makers	Learns Why Prospects Would Buy	Learns How Prospects Would Buy	Does NOT Assume	Comfortable Talking About Money	Has High Money Tolerance	Has No Need For Approval	Controls Emotions	Has Supportive Record Collection	% of Qualifier Traits
Larry	✓	✓				✓	✓	✓	✓	✓	70%
Norman	✓						✓		✓		30%
Greg		✓					✓	✓			30%
Georgia	✓	✓					✓	✓			40%
Dawn				✓				✓	✓	✓	40%

**SKILL SETS**

Name	Farmer Skill Set								
	Has Killer Instinct	Attempts To Close	Controls Emotions	Won't Accept PutOffs	Has Supportive Buy Cycle	Has Difficulty Recovering From Rejection	Has Need For Approval	Won't Prospect	% of Farmer Traits
Larry			✓		✓	✓			38%
Norman		✓	✓			✓	✓		50%
Greg		✓				✓			25%
Georgia						✓			13%
Dawn			✓			✓			25%

**SKILL SETS**

Name	Account Manager Skill Set										
	Develops Bonding and Rapport	Gets To Decision Makers	Uncovers Actual Budget	Knows How To Handle People	Effective Time Management	Lacks Killer Instinct	Has Need For Approval	Won't Prospect	Believes - "I should be their friend"	Inappropriate Follow Up Calls	% of Account Manager Traits
Larry		✓	✓	✓		✓				✓	50%
Norman	✓		✓		✓	✓	✓			✓	60%
Greg		✓		✓		✓				✓	40%
Georgia		✓	✓		✓					✓	40%
Dawn				✓		✓				✓	30%

**SKILL SETS**

Name	Intellectual Skill Set											
	Attempts To Close	Uncovers Budget	Gets To Decision Makers	Learns Why Prospects Buy	Learns How Prospects Buy	Has At Least 10 Skills	Has Need For Approval	Has Non-Supportive Buy Cycle	Has Self Limiting Record Collection	Has Money Issues	Has Difficulty Controlling emotions	% of Intellectual Traits
Larry		✓	✓			✓						27%
Norman	✓	✓					✓	✓	✓	✓		55%
Greg	✓		✓					✓	✓	✓	✓	55%
Georgia		✓	✓					✓	✓	✓	✓	55%
Dawn					✓			✓		✓		27%

**SKILL SETS**

Name	Ambassador Skill Set								
	Develops Bonding and Rapport	Gets Referrals and Introductions	Knows How To Handle People	Enjoys Selling	Inappropriate Follow Up Calls	Wasting Time - Selling System	Believes - "I should be their friend"	Skills Limited To The First 3 Of This List	% of Ambassador Traits
Larry			✓	✓	✓	✓			50%
Norman	✓			✓	✓	✓			50%
Greg			✓	✓	✓	✓			50%
Georgia		✓			✓				25%
Dawn		✓	✓	✓	✓	✓			63%

**SKILL SETS**

Name	Timid Skill Set						
	Has Low Self Esteem	Has Need For Approval	Has Difficulty Recovering From Rejection	Uncomfortable Talking About Money	Has Outlook Problem	Is Not Money Motivated	% of Timid Traits
Larry	✓		✓				33%
Norman	✓	✓	✓	✓			67%
Greg	✓		✓	✓		✓	67%
Georgia	✓		✓	✓		✓	67%
Dawn	✓		✓	✓		✓	67%

# **Management Overview**

## **Management Skill Set Summary**



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**SKILL SETS**

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Name	Performance Master							% of Performance Master Traits
	Doesn't Accept Mediocrity	No Need for Approval From Salespeople	Takes Responsibility	Manages Behavior	Asks Questions	Manages Pipeline	Record Collection Supports Accountability	
Ed		✓	✓		✓	✓	✓	71%

**SKILL SETS**

Name	The Recruiter									
	Upgrades the Sales Force	Uses Correct Hiring Criteria	Hires the Best Person for the Position	No Need for Approval from Salespeople	Good Bonding and Rapport	Good Interviewing Skills	Recruits Consistently	Good Decision Maker	Record Collection Supports Recruiting	% of Recruiter Traits
Ed	✓	✓		✓	✓	✓	✓	✓	✓	89%

**SKILL SETS**

Name	The Coach											83%
	✓ Debriefs Effectively	✓ Handles Joint Sales Calls Effectively	Asks Questions	✓ No Need for Approval from Salespeople	✓ Controls Emotions	✓ Doesn't Rescue the Salespeople	✓ Has a Selling System	✓ Knows Why People Buy	✓ Knows How People Buy	✓ Effective at Getting Commitments	Consistently Coaches and Debriefs	
Ed												

**SKILL SETS**

Name	The Mentor								
	Strong Self Image	Effective When Asking Questions	Effective at Handling People	Effective at Listening	Doesn't Accept Mediocrity	Takes Responsibility	Flexible Thinker	Record Collection Supports Growing People	% of Mentor Traits
Ed	✓	✓	✓	✓		✓	✓	✓	88%

**SKILL SETS**

Name	The Motivator									
	Has Goals and a Plan	Knows What Motivates Salespeople	Gives Recognition	Strong Self Image	Good Bonding and Rapport	Runs Effective Sales Meetings	Doesn't Accept Mediocrity	Takes Responsibility	Record Collection Supports Motivation	% of Motivator Traits
Ed	✓	✓	✓	✓	✓			✓	✓	78%

# Sales

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## Sales Issues



**OBJECTIVE  
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## **SALES PROBLEMS UNCOVERED**

The information that I'll be presenting in this section is sales specific. For the managers or executives mentioned in this section, we will be referring to their strengths, weaknesses, skills and vulnerabilities that are relative to sales but not necessarily sales management.

## **THE MAJOR WEAKNESSES**

I have identified five major weaknesses which, when present in certain combinations, will neutralize all of an individual's strengths and skills, causing a sales paralysis of sorts. These weaknesses are known as "Buy Cycle", "Money", "Approval", "Emotions", and "Self-Limiting Records". You have people who share these weaknesses and on the following pages I will explain who has them, what it means, and how it affects your business.

## **NON-SUPPORTIVE BUY CYCLES**

Norman, Greg, Georgia and Dawn all have Buy Cycles that don't support the selling process.

This is fairly serious. With so many people in your group having the problem, you should probably take a closer look at these criteria the next time you make a decision to interview salespeople.

Understanding this weakness requires a tremendous degree of open-mindedness on the part of you and your salespeople. 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 sell.

Buy Cycle refers to the process by which your salespeople make purchases for themselves. They will tolerate behavior from their prospects when it is similar to their own. A buy cycle that fails to align itself with an ideal selling process causes many of the obstacles your salespeople 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 non-supportive buy cycle makes salespeople more vulnerable to stalls, put offs, lies, excuses, sob stories and other forms of "think it over." 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 salespeople make purchases. Finally, when their buy cycles support the selling process, the stalls and put-offs that used to derail their process will become momentary delays in a single sales call.

**VULNERABLE TO PROSPECTS THAT THINK THINGS OVER**

Norman, Greg, Georgia and Dawn are all vulnerable to prospects that wish to think things over.

Salespeople with 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 salesperson wastes a tremendous amount of time performing unnecessary follow-up.

Alan Naumann, President and CEO of Calico Technologies was interviewed for Fast Company Magazine. He said, "We have to make decisions faster because our customers are making decisions faster and the industry is changing faster than ever before." Ruthann Quindlen, a partner at IVP said, "if your instinct is to wait, ponder and perfect then you're dead." They both believe that from the top down, you must create leaders in your company - and leaders must be effective decision makers.

**VULNERABLE TO PROSPECTS THAT COMPARISON SHOP**

Larry, Norman, Greg, Georgia and Dawn are all vulnerable to prospects that wish to comparison shop.

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

**LOW MONEY TOLERANCE**

Dawn is vulnerable to prospects who could spend a lot of money.

Salespeople 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, salespeople will often invest extra time on these prospects to the exclusion of their other customers and prospects. If a salesperson is in awe of the potential investment a prospect could make and the prospect eventually says, "That's a lot of money" the salesperson understands and is not able to overcome that obstacle. If you want to change the results your salespeople must change their perception of how much money constitutes a lot of money.

There are many areas in the selling process where your salespeople 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 salespeople 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
Larry			✓		
Norman	✓	✓	✓		
Greg	✓	✓	✓		
Georgia	✓	✓	✓		
Dawn	✓	✓	✓		✓

## **NEED FOR APPROVAL**

Norman seems to be the only person that has any need for approval.

Since this represents less than one third of this particular group, it doesn't appear to be as serious as some of the other weaknesses.

When salespeople need approval from their prospects, they are unable to close effectively. They probably focus on comments like, "We really appreciate what you did for us" instead of getting the business closed. They find it difficult to ask tough questions because they're afraid that their prospects may become upset. They tend to be non-confrontational and they will waste time with a prospect who has lied rather than ask the prospect why they were being misled. They are likely to accept "maybes" instead of "no's" 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 "no's" instead of "maybes" they will stop wasting time, become much stronger and significantly shorten their sell cycle!

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.

Let's look a little deeper into some of the weaknesses that often accompany the Need for Approval: Difficulty Recovering from Rejection as well as the problem of being Too Trusting of clients.

## **DIFFICULTY RECOVERING FROM REJECTION**

Larry, Norman, Greg, Georgia and Dawn all have a problem with the time it takes to recover from rejection.

While this weakness will affect a salesperson's ability to close, it's a more frequent companion to the prospecting component of selling. If you need these people to get on the phone and find new business, this weakness may be the primary obstacle to consistent prospecting.

When salespeople begin to recover from rejection, the most serious problem is that the rejection sometimes causes "paralysis." People won't 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. Encourage them to get a "no" when they can't get a "yes." By doing this, they'll succeed either way!

**TOO TRUSTING**

Norman and Georgia both have a somewhat idealistic view of prospects.

While this represents less than half of the group, it's still safe to say that it indicates a real problem. The next time that you interview you'll want to pay more attention to this particular weakness.

The people your company has been hiring are too trusting. They're just too nice. This happens when you focus on hiring nice people rather than real strong salespeople. This problem commonly takes place in small companies, where owners are looking for nice people that can form a core. Companies where Human Resource professionals place an emphasis on an individual's personality rather than their ability to sell also tend to make this mistake. While it is possible to find both very strong and very nice salespeople, the process can be similar to finding a needle in a haystack. If you must choose between the two, your emphasis should be on strong.

A salesperson's 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 salespeople some "How do you know that?" or "How do you know they're real?" type questions. Another good question you can ask 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.

NAME	Need for Approval	Difficulty Recovering From Rejection	Too Trusting
Larry		✓	
Norman	✓	✓	✓
Greg		✓	
Georgia		✓	✓
Dawn		✓	

Now we can move on to another major weakness that often affects a large percentage of people:

## **EMOTIONALLY INVOLVED**

Greg and Georgia are both having difficulty controlling their emotions.

Salespeople that have a tendency to become emotional tend to worry, strategize on the fly, are excitable, creative, or analytical. After sales calls 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 may have asked a question or raised an objection that they weren't expecting so they began to think about handling the obstacle and stopped listening. Next they lose objectivity and control usually leading to an unfavorable outcome. You must help them control their mind clutter. Encourage them to relax, have fun and trust in their ability to say and do the right thing at the right time during calls.

## SELF-LIMITING RECORD COLLECTIONS

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

Norman, Greg and Georgia all have self-limiting record collections.

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

Self-limiting records or beliefs predetermine your salespeople's 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.

### Self-Limiting Records (Beliefs) Among Your Salespeople

A thousand dollars is a lot of money	Dawn
It's OK if my prospect shops around	Norman, Greg and Georgia
It's OK if they think it over	Norman, Greg and Dawn
I must educate the prospect	Larry, Norman, Greg and Georgia
I don't like making cold calls	Greg, Georgia and Dawn
I have a long sell cycle	Greg
Selling isn't fun	Georgia
I'm uncomfortable with certain aspects of selling	Dawn
I have to call on purchasing agents before end users or decision-makers	Larry, Norman and Greg
It's impolite to talk about their money	Georgia
If they're happy with their present vendor then I can't help them	Greg and Georgia
Prospects are honest	Norman and Georgia
Prospects that think it over will eventually buy from me	Georgia

Overview for ABC Company

I should spend measurable time with prospects that don't buy from me	Greg
Any lack of results are due to the economy or marketplace	Greg
Any lack of results are due to my competitors	Norman
A plan isn't important enough to me to have one	Norman
I should tell my prospects why they should buy from me	Dawn
I don't need a strong relationship with prospects in order to sell them	Larry
It's not necessary to ask prospects about their money	Georgia
Rejection wipes me out	Georgia

## **DISCOMFORT TALKING ABOUT MONEY**

Norman, Greg, Georgia and Dawn all find it difficult to have an in-depth conversation with prospects about their finances.

Pamela York Klainer, a career coach who was interviewed for Fast Company magazine said that "most people consider it distasteful to talk about money and it's seen as especially distasteful to talk about our feelings about money."

When salespeople are uncomfortable talking about money they find it extremely difficult to ask prospects how much money there is, where it might be coming from or how to come up with more. This becomes even more difficult when the prospect is equally uncomfortable so they usually fail to learn how much money a prospect will spend with them. Help your salespeople 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 Jim Sasena told me, your company sells software.

I'm guessing that you have a fairly high-ticket sale and that you're not the only game in town - you must have competition. Your salespeople can prevent your competitors from sneaking in, beating them out, low balling or even buying market share by having more comprehensive discussions about finances with their prospects. While I may have indicated that some of your people are uncovering budgets from their prospects, it could be a one-question act. They need to be more inquisitive and persistent in their discussions.

## **SLOW TO DEVELOP RELATIONSHIPS**

Larry, Greg, Georgia and Dawn all need to become more effective at quickly establishing bonding and rapport.

Bonding with a prospect is essential to every sales process. While some of your salespeople have developed strong relationships with their customers, bonding is not being established early enough in the selling process. A salesperson's selling skills are most effective when the prospect is comfortable, relaxed, trusting and open. The questions a salesperson must ask to obtain a favorable outcome should take place during the first call. If bonding hasn't been firmly established the prospect could be much less cooperative. Some salespeople don't have any selling skills other than their ability to develop strong relationships. A professional salesperson must be able to establish bonding AND use their honed selling skills. When this is done effectively and consistently it will usually shorten the selling cycle by eliminating wasted time.

## SELLING SYSTEM

Larry, Norman, Greg and Dawn all need a more effective selling system or they need to implement the one currently being used.

Without a common selling system, each salesperson speaks a different language. It gets complicated when you waste time while managing multiple processes. A common, effective system can assure a favorable outcome while generally preventing your salespeople from wasting their 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 that were common to your salespeople were:

- Inappropriate quotes (could be bids or proposals)
- Inappropriate follow-up calls with prospects
- Calling on purchasing agents too early in the process
- 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
- Your people are not reaching the real decision-makers

When you answered the 17 Priority questions you indicated that sales force automation is a priority. Given the findings and your priority, my next recommendation is a simple way to execute one of your strategies while solving one of the problems I have identified.

One of the ways in which we can help you get a handle on the problem of inappropriate quotes and proposals is with our Qualifier tool. Your salespeople simply log on to [OMGQualifier.com](http://OMGQualifier.com), answer several questions about the prospective account to whom they wish to propose, and a report will indicate whether the prospect is sufficiently qualified. When the account does not 'qualify', instructions are provided for the salesperson to gather additional information. You will be emailed a copy of the report automatically. In appreciation of the trust you have placed in us, we would like to provide you with a free 90-Day trial to Qualifier. If you wish to continue making this service available to your salespeople after the free trial period, please contact your Sales Development expert for Objective Management Group, Inc.

We will be happy to provide training for Qualifier if you request it and there is help available at the site. In order to receive copies of the reports, you must log into the site and enter your email address. Please call 800-221-6337 or send an email to [info@objectivemanagement.com](mailto:info@objectivemanagement.com) when you are ready to have your complimentary account activated.

## SELLING VALUE

Today, most companies see 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 salespeople to differentiate your company from your competitors. They must be able to masterfully sell value and this requires advanced selling skills.

When it comes to selling value, most of your people have selling skills which are above average. Your people have the basics down pretty well. Without a doubt, Ed 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 Greg has more weaknesses, many of them major - so the results won't be as good as they will for Ed who, because of fewer major weaknesses, should be able to execute more effectively and more consistently. Anyway, David Kurlan & Associates, Inc. should be able to help greatly in this area.

Summary Of Selling Skill Problems		
Name	Bonding & Rapport	Selling System
Larry	✓	✓
Norman		✓
Greg	✓	✓
Georgia	✓	
Dawn	✓	✓

## **SATISFIED WITH INCOME AND ENJOYING SELLING**

Individually, the next two findings are not usually reasons for concern. However, when individuals have both “Not Money Motivated” and “Doesn’t Enjoy Selling”, it is a strong indicator of performance problems. Our research shows that most salespeople who fail, who weren’t already flagged with “Lack of Desire” or “Lack of Commitment”, had the combination of “Not Money Motivated” and “Doesn’t Enjoy Selling”. Incentive to Change is an important finding because it helps us determine whether the individual is trainable and capable of improved performance. As you can imagine, someone who doesn’t like what they do and isn’t motivated by the money it can bring, doesn’t have much incentive to change.

Greg, Georgia and Dawn are not really motivated to increase their incomes at this time.

When salespeople aren't motivated to increase their income their desire to achieve additional success in sales can be affected. These individuals often lack the incentive to find new business. If they are good at servicing accounts, sometimes it makes sense to offer a modest salary for providing service only. In the past 25 years, I have n't seen a truly successful salesperson that wasn't tremendously motivated to earn more money. One possible solution would be to encourage them to set greater personal goals that would require a significant increase in income.

Georgia does not enjoy selling.

<b>NAME</b>	<b>Doesn't Enjoy Selling</b>	<b>Not Motivated to Earn More Money</b>
Dawn		✓
Greg		✓
Larry		
Georgia	✓	✓
Norman		

## **GOALS, PLAN AND TRACKING**

Norman, Greg, Georgia and Dawn have all not finished working on goals, goals management and a tracking program.

In most cases your salespeople either don't have goals or they haven't connected their goals to a 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 a good place to start. Have your salespeople 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 and set a "have by" date. They must determine how much money they need to earn in the next twelve months and then, create a plan which, when followed, allows them to reach their goals. A 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 sales management practices and Goals and Plans are good examples. You haven't required your people to accomplish this important process. Although this is a fundamental part of sales, it's also a symbol of the kind of work that you must do in order to get your sales management house in order.

## **THE FOUR CRUCIAL ELEMENTS**

The following four crucial elements for success are the most important elements we look at. We are able to determine incentive for change, growth potential and even whether an individual is trainable, just from looking at this combination of elements.

### **OUTLOOK**

None of your people have an outlook problem that I was able to detect.

This is extremely positive. It's very unusual when I see a sales force and there isn't even an isolated incident of someone with less than desirable outlook. This tells me that expectations are realistic, the environment is good and your people enjoy working at your company.

### **EXCUSE MAKING**

Norman and Greg are both making excuses when the desired results aren't obtained.

When salespeople make excuses, they're actually selling themselves short and when you accept their excuses 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, 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 to raise their expectations by asking, "If you couldn't use that excuse, what could you have done differently to overcome that obstacle?" This strategy empowers people and forces them to hang in there and work harder or smarter, knowing that you won't accept that excuse ever again.

TIP - 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.

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

When salespeople 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.

Norman will blame your competition.

When salespeople blame the competition it often means that they feel that your competition either low-balled a price or purchased additional market share. The reality is that a salesperson either failed to sell the value of your company or its products or services. In essence, the salesperson was outsold by your competition. In order for salespeople to take responsibility for being outsold they must first admit that they were ineffective. Since they don't believe that you wish to hear about their ineffectiveness they create excuses instead.

Someone has been accepting excuses from your salespeople. This is one of the easier problems to solve and by doing so now you will see an immediate change for the better in their performance!

NAME	Makes Excuses	Blames the Economy	Blames your Company	Blames the Competition
Norman	✓			✓
Greg	✓	✓		

### COMMITMENT

None of your people lack commitment!

Not only is this a good thing, but believe it or not, it's also fairly unusual when not one person is commitment challenged! I congratulate you for heading up such a dedicated group of people.

### DESIRE

None of your people lack desire either!

You probably don't know how rare it is for me to find an organization where all of the people have a strong desire to become more successful in sales.

Desire is the single most crucial element for success and I congratulate you for your role in this strong showing. You're either hiring people that already possess strong desire, helping people maintain their strong desire or both! Keep up the good work!

**SUMMARY OF CRUCIAL ELEMENTS**

I've just completed the four most crucial categories - outlook, excuse making, desire and commitment. Based on the results for your salespeople in these four elements, I don't have major concerns with any of them.

NAME	Lack of Desire	Lack of Commitment	Outlook Problem	Excuse Making
Norman				✓
Greg				✓

## **TRAINABLE WITH POTENTIAL FOR GROWTH**

Ed, Dawn, Greg, Larry and Norman all have very realistic potential for growth.

They all have strong desire and commitment too. In addition, you should also be able to recognize that they all have a real good outlook.

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

Ed, Dawn and Larry all 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.

Greg and Norman both have many weaknesses and a lot 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 salespeople need in the area of skills training.

Ed and Larry both have skills that are good enough to begin working on advanced skills right away.

Dawn, Greg and Norman must all improve their existing skills before tackling advanced skills.

There is no question at all that with the right training, ongoing and conducted regularly, you will see dramatic results and tremendous improvement.

I'd like to make some training recommendations but feel a need to clarify them first. Everyone has different training needs that vary by the amount of training required as well as the content of the training. While I can be specific about the content, the amount is a little more difficult because it depends on so many things. Some of the factors include the location of your salespeople, their in-the-field or on-the-phone requirements, the proximity of the trainer(s) to your offices, the number and type of weaknesses an individual possesses, your budget, the way a training company prefers to structure its training and the expertise of the trainer. So it's with all that in mind that I will attempt to make some recommendations as to "how much" training each person will require. The actual training that your sales development expert recommends will likely vary, based on the factors I just mentioned. So look at these recommendations as a way to gauge the differences in each individual's requirements rather than an etched-in-stone plan.

The amount of training I suggest for managers in the following recommendations include not only their sales training requirements but their sales management requirements as well.

Dawn will benefit from about eight months of training.

Greg, Larry and Norman will all benefit from about twelve months of training.

Ed will benefit from about fourteen months of training.

All of the training should have a role-playing component. If your people succeed with prospects who, in role-play, are more difficult than any real prospect they encounter their sales calls will be much more successful.

Based on the leading indicators used in the evaluation of your sales force, it appears that accountability and coaching will continue to be issues that you'll need help with. We suggest that you inquire about SalesTrack, our web based software application that includes excellent tools for holding your salespeople accountable, coaching your salespeople, reporting and tracking their activity, measuring their growth from training, and much more.

Ed would benefit tremendously from some sales management training. I strongly suggest this as a way of helping you build a stronger sales organization.

### **SUMMARY OF TRAINING RECOMMENDATIONS**

NAME	Months Required	Type	Good Strengths	Many Weaknesses
Larry	12	Advanced	✓	
Norman	12	Improve Skills		✓
Greg	12	Improve Skills		✓
Dawn	8	Improve Skills	✓	
Ed	14	Advanced	✓	

## **LIMITED POTENTIAL FOR GROWTH**

In his best-selling book, "Good to Great," author Jim Collins explained that good-to-great leaders first made sure that they first got the right people on the bus, the wrong people off the bus, the right people in the right seats and then they figured out where to drive it. This might explain the discomfort you feel when you begin to read through the next several pages for the first time.

Collins also reported that good-to-great leaders of good-to-great companies also had the discipline to confront the most brutal facts of their current reality, whatever they might be.

Georgia has limited potential for growth at this time.

Georgia has limited potential for growth because Georgia is not motivated to earn more money and does not enjoy selling.

This combination doesn't support either growth or change so it's not realistic to expect similar results training this individual as you'll experience from training the previous group. There just isn't enough incentive to change.

**TRAINING NEEDS**

Below we list the areas in which your salespeople need help. The percentage of the group requiring help is listed to the right of each area:

<b>TRAINING AREA</b>	<b>CORE COMPETENCY</b>	<b>TRAINING MODULE</b>	<b>% of Group</b>
Eliminate Put-Offs	Doesn't Need Approval	Objections	100
Learning to Recover from Rejection	Recovers From Rejection	Selling Process	83
Improve Bravery	Strong Self Confidence	Success Barriers	83
Getting Stronger Appointments	Reaches Decision Makers	Hot Buttons	67
Fewer Inappropriate Time Wasting Decisions	Effective Listening And Questioning	Hot Buttons	67
Improve Productivity	Consistent Effective Prospecting	Prospecting	67
Improve Selling Skills	Discovering Why Prospects Buy	Selling Process	67
Shortening the Sell Cycle	Qualifies Proposals & Quotes	Selling Process	67
Mastery of a More Powerful Selling System	Discovering Why Prospects Buy	Selling Process	67
Establishing Early Bonding and Rapport	Early Bonding And Rapport	Prospects Buying Strategies	67
Changing Non-Supportive Buy Cycles	Supportive Buy Cycle	Success Barriers	67
Become Comfortable with Financial Conversations	Comfortable Talking About Money	Success Barriers	67
Creation of Goals Management Plans	Follow Goals With A Plan	Charting Your Course	67
Comprehensive Goal Setting Program	Has Written Goals	Charting Your Course	67
Improve Motivation	Strong Desire For Success	Charting Your Course	50
Organization Skills and Time Management	Follow Goals With A Plan	Charting Your Course	50
Reprogramming Self-Limiting Record Collections	Supportive Record Collection	Success Barriers	50
Eliminating Excuses	Takes Responsibility	Success Barriers	33
Better Understanding of People	Early Bonding And Rapport	Prospects Buying Strategies	33
Better Closing Skills and Execution	Gets Commitments And Decisions	Closing the Deal	33
Getting Prospects to Agree to Make Decisions	Gets Commitments And Decisions	Selling Process	33
Uncovering Real Budgets More Effectively	Uncovering Actual Budgets	Addressing Budget Concerns	33
Getting to Actual Decision Makers	Reaches Decision Makers	Results Oriented Prospecting	33

Overview for ABC Company

Learning to Control Their Emotions	Controls Emotions	Objections	33
Improve Listening Skills	Effective Listening And Questioning	Objections	17
Improved Questioning Skills	Effective Listening And Questioning	Hot Buttons	17
Overcoming Their Need for Approval	Doesn't Need Approval	Success Barriers	17

**Final Training Recommendations:**

David Kurlan & Associates, Inc. has the expertise to help your people in these areas. Our experience with David Kurlan & Associates, Inc. has been highly favorable and we recommend that you take advantage of their numerous training and coaching talents.

For the last 15 years, our experience with companies who are committed to both excellence and change know that accomplishing these two goals requires long-term commitment. Depending upon your position in the marketplace, successful completion of this initiative can take 3-5 years.

Our findings confirm that accountability starts at the top and trickles down to the salespeople. As Jim Collins states in his book, "Good to Great," "Confront the most brutal facts of your current reality, set the standard for building an enduring company and demonstrate an unwavering resolve to do whatever it takes to produce long-term results." Your desire to make your company great, along with your commitment to change for the better will be both rewarding and profitable.

### Summary Of Organizational Strength

<b>TRAINABLE</b>	<b>YES</b>	<b>Weaker with Potential</b> Norman Larry Greg	<b>Stronger - Need a Challenge</b> Dawn Ed
	<b>NO</b>	<b>Consider a Different Role</b> Georgia	<b>Maintain if Results are Acceptable</b> none

#### Develop Those Who Have Potential

This group represents the people who have the greatest potential for growth. These aren't necessarily your strongest people, but they have the potential to become stronger. These are the people in whom you should invest heavily, provide training and coaching, and down the road, your investment will pay dividends.

If ever there was group with a heavy concentration of salespeople who could significantly improve, this would be the one. There's nothing better than having a group of people that can become two to three times better with training and coaching.

#### Challenge Those Who Are Trainable and Stronger

This group represents the people who are already quite strong and with the challenge of advanced training and coaching, will become even stronger. Investing in this group will provide immediate dividends.

#### Maintain Existing Business With Those Who Are Not Trainable

You don't have any people that fall into this category.

#### Consider a Different Role for Those Who Are Not Trainable

This group represents the people that you should consider replacing. The group consists of those who have no incentive to change, and/or those who are hopelessly weak. Unless you are thrilled with the contributions that the people in this group are making, the time may be right to replace them with stronger salespeople.

*\*\*NOTE\*\* For certain people whose primary role is NOT sales, including sales engineers, application engineers and other non-selling professionals, the recommendation to consider replacement can be ignored.*

### 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	Uncomfortable Talking About Money	Non-Supportive Buy Cycle	Ineffective Selling System/Skills	Not Developing Instant Bonding	Lack of Desire	Lack of Commitment	Not Money Motivated	Too Trusting of Prospects	Limited Potential for Growth	Months of Training	Growth Potential
Ed																	14	72
Larry							✓			✓	✓						12	41
Norman	✓		✓	✓		✓	✓	✓	✓	✓					✓		12	112
Greg	✓		✓	✓	✓		✓	✓	✓	✓	✓			✓			12	122
Georgia	✓			✓	✓		✓	✓	✓		✓			✓	✓	✓	12	112
Dawn	✓						✓	✓	✓	✓	✓			✓			8	112

This chart is intended to be a guide for training and coaching. It shows each of the areas covered in this overview and indicates the areas in which each of your people will require assistance. Just a reminder; the number for *months of training* illustrates the relative difference in training requirements between each individual. The actual frequency and length of training required will vary based on a number of factors. Please ask your sales development expert to provide a training recommendation based on those factors.

### Management Summary Chart

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	Ineffective Selling System/Skills	Non-Supportive Buy Cycle	Not Running Strong Sales Meetings	Self-Limiting Collection of Management Records	Need for Approval from Salespeople	Limited Management Growth Potential	Not Holding People Accountable
Ed	✓				✓	✓		✓			✓				✓

### Findings Summarized As Core Competency Ratings

Below is a summary of each salesperson’s assessment related to the 21 Core Competencies. The assessment findings are used to determine a rating between 0 and 10 for each of the Competencies. The last column contains the Sales Quotients which are calculated by assigning weights to the ratings in each of the 21 Core Competencies.

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	Reaches Decision Makers	Effective Listening/Questioning	Early Bonding and Rapport	Uncovering Actual Budgets	Discovering Why Prospects Buy	Qualified Quotes and Proposals	Gets Commitments	Strong Desire	Strong Commitment	Sales Quotient
Larry	10	10	9	10	10	8	9	10	7	10	6	10	6	7	3	8	8	9	7	8	10	147
Norman	2	2	10	2	10	5	9	8	8	5	2	10	4	7	10	8	8	6	7	10	10	123
Greg	7	4	9	2	10	5	8	9	8	5	2	10	6	7	5	5	8	6	7	8	10	114
Georgia	8	8	9	10	8	3	8	9	5	3	2	10	10	6	5	7	7	8	4	8	10	119
Dawn	8	8	8	10	9	8	9	10	7	3	2	10	8	7	5	3	8	5	7	6	6	114

### Priority Questions

<ol style="list-style-type: none"><li>1. <b>With regard to accounts and customers my number one priority is:</b><ol style="list-style-type: none"><li>a. Volume</li><li>b. Profit</li></ol></li><li>2. <b>With regard to the financial profile of a potential customer my number one priority is:</b><ol style="list-style-type: none"><li>a. Potential volume</li><li>b. Credit worthiness</li></ol></li><li>3. <b>With regard to the details of the business my number one priority is to:</b><ol style="list-style-type: none"><li>a. Follow the plan without deviation</li><li>b. Pursue unplanned opportunities whenever they appear</li></ol></li><li>4. <b>I see the sales manager's role as:</b><ol style="list-style-type: none"><li>a. A manager who maintains personal sales.</li><li>b. A salesperson with supervisory responsibility</li><li>c. Manage and develop salespeople</li><li>d. A supervisory position</li></ol></li><li>5. <b>With regard to recruiting, my number one priority is to hire:</b><ol style="list-style-type: none"><li>a. Only A players</li><li>b. The first available candidate</li><li>c. The best available candidate</li></ol></li><li>6. <b>With regard to providing training my number one priority is to:</b><ol style="list-style-type: none"><li>a. Bring in outside training professionals</li><li>b. Have our people provide the training</li><li>c. Realize that training doesn't work</li><li>d. Hire salespeople who don't require any training</li></ol></li><li>7. <b>With regard to compensation I believe that we ultimately have a plan that is:</b><ol style="list-style-type: none"><li>a. All salary</li><li>b. Salary plus bonus</li><li>c. Salary plus commission</li><li>d. All commission</li></ol></li><li>8. <b>With regard to developing people my number one priority is:</b><ol style="list-style-type: none"><li>a. Develop our existing people</li><li>b. Replace all our non performers</li></ol></li></ol>	<ol style="list-style-type: none"><li>9. <b>With regard to Sales Force Automation my number one priority is to:</b><ol style="list-style-type: none"><li>a. Have the latest and greatest installed</li><li>b. Plan a future installation</li><li>c. Continue without these tools</li></ol></li><li>10. <b>With regard to our market strategy my number one priority is to:</b><ol style="list-style-type: none"><li>a. Expand it</li><li>b. Defend it</li><li>c. Maintain it</li></ol></li><li>11. <b>With regard to Trade Shows my number one priority is to participate:</b><ol style="list-style-type: none"><li>a. In every appropriate show</li><li>b. In targeted shows</li><li>c. As little as possible</li></ol></li><li>12. <b>With regard to the role of marketing my number one priority is for it to:</b><ol style="list-style-type: none"><li>a. Create leads</li><li>b. Create visibility</li><li>c. Generate sales</li><li>d. Enhance image</li></ol></li><li>13. <b>With regard to reaching our clients my number one priority is to:</b><ol style="list-style-type: none"><li>a. Create new channels</li><li>b. Develop existing channels</li></ol></li><li>14. <b>With regard to our identity my number one priority is to be known as a leader in:</b><ol style="list-style-type: none"><li>a. Price</li><li>b. Quality</li><li>c. Service</li><li>d. Expertise</li></ol></li><li>15. <b>With regard to growth my number one priority is:</b><ol style="list-style-type: none"><li>a. Finding new business</li><li>b. Growing existing accounts</li></ol></li><li>16. <b>With regard to competition my number one priority is to:</b><ol style="list-style-type: none"><li>a. Beat their price</li><li>b. Match their price</li><li>c. Hold firm on our price</li></ol></li><li>17. <b>With regard to an internet strategy my number one priority is to:</b><ol style="list-style-type: none"><li>a. Take a wait and see attitude</li><li>b. Use it to compliment our business</li><li>c. Move to an internet based business</li><li>d. Have a web presence</li><li>e. Ignore it for now</li></ol></li></ol>
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## Questions and Their Categories

Question	Title	Category
1	Account & Customers	Business
2	Financial Profile of Prospects	Business
3	Business Plan	Business
4	Sales Manager's Role	Sales
5	Recruiting	Sales
6	Training	Sales
7	Sales Compensation	Sales
8	Developing Employees	Sales
9	Sales Force Automation	Sales
10	Market Strategy	Marketing
11	Trade Shows	Marketing
12	Role of Marketing	Marketing
13	Reaching Clients	Marketing
14	Company Identity	Marketing
15	Business Growth	Business
16	Price Competition	Business
17	Role of Internet	Business

<b>THE SUBTLE DIFFERENCES BETWEEN SIMILAR FINDINGS</b>	
<b>Similarity</b>	<b>Difference</b>
Will Prospect vs. Isn't Prospecting	The salesperson 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 salesperson 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 salesperson is uncomfortable talking about money but is learning the size of the prospect's budget. However, the salesperson 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 salesperson 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 salesperson 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 salesperson is held accountable for prospecting activities, he will succeed at getting beyond secretaries.
High Money Tolerance vs. Uncomfortable Talking About Money	The salesperson 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 salesperson is doing it but hates it!
Has Killer Instinct vs. Lacks Killer Instinct	When we find "Has" we believe the salesperson consistently seeks to close business. When we find "Lacks" we believe the salesperson consistently avoids or does not seek to close. Those who "may" seek to close we find as neither having nor lacking killer instinct.

## WHAT THE PROFILE MEANS

As you recall, your salespeople learned about and rated themselves on eleven of the ingredients that are important for success in sales. 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 salesperson's passion for success. It also helps to indicate whether the salesperson is motivated to earn additional income. Lack of desire is often responsible when a salesperson avoids activities that aren't enjoyable.

If I indicate that one of your salespeople lacks 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 salesperson gets excited about a clear destination and recognizes that he can fulfill that dream using his sales career as the vehicle. Beware! If a salesperson 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 salesperson 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, daily prospecting (or in some cases, servicing), but when used effectively, it also predicts future sales and cash flow.

When exercising is consistent, salespeople 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 salesperson that has an outlook problem should be considered a negative influence on the rest of the sales force. 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 salesperson's bravery slowly begins to grow. Record collection and bravery support style. A supportive record collection enables your salespeople to develop and improve their style. This is crucial if your salespeople are to take control of the selling 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 salesperson whose level of satisfaction becomes too high. This is the indicator for contentment, which ultimately has a negative impact on desire.

A committed salesperson 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 salesperson 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.

## **PROFILE DEFINITIONS**

**DESTINATION** – How clearly the individual has defined his goals.

**COMPASS** – How well the individual is aimed at his destination.

**RECORD COLLECTION** – The quality (supportive vs. self-limiting) of the collection of beliefs held by the individual.

**OUTLOOK** – How the individual feels about himself, his job and his company.

**COMMITMENT** – The individual's willingness to do whatever it takes.

**DESIRE** – The individual's passion for success.

**EXERCISE PROGRAM** – The consistent actual performance of planned activity.

**STYLE** – The combination of personality, bonding and rapport, technique and selling process necessary for effective selling.

**BRAVERY** – The ability to do what must be done, even when it is uncomfortable.

**SATISFACTION** – Happiness with one's income.

**RESULTS** – The bottom-line.

**Here's a copy of the cover letter that each of your salespeople received with their evaluation. Please note our attempt to set proper expectations while making them aware that we are not criticizing them personally.**

“Thanks for completing and returning your self-assessment folio. Before you read your completed personal evaluation, I'd like to explain a few of its concepts.

First, I'd like you to remember the spirit in which this evaluation was intended. Its primary purpose is to give you additional insights with which to increase sales; a benefit designed to increase earnings for you and your company. This is not in any way intended to be negative or critical.

Second, this isn't a psychological assessment or a personality profile; therefore it shouldn't in any way be read as a critique of you as an individual. It should only be seen as a microscopic view of how you think and function in ways that affect your success as a salesperson. That may help you to understand any possible disagreements you may have with certain portions of my commentary, which are based entirely on sales values and more than 20 years of successful sales, sales management and sales training experience. While it isn't my intent to challenge your personal value system, acceptable sales values and performance may differ significantly from your personal beliefs and expectations.

Most salespeople want to know whom they are being compared to when strengths and weaknesses are indicated. In this evaluation, you are being compared to the ideal salesperson. While a comparison to Joe or Mary Average would show you in a more favorable light, it would only serve to encourage mediocrity.

Finally, don't take anything personally, it isn't meant that way. Any weaknesses described on the following pages are sales related weaknesses only, not character flaws. The changes I've suggested are designed to help you control the selling process more effectively, and as a result, shorten the selling process, sell more, and sell more often. Thanks again for your participation and good luck in your pursuit of sales excellence!”