

IntRAtrain Coach's Activity Guide
New Salespeople

Welcome to the IntRAtrain Business Development Services Sales Development Program!

Employees are the most important asset of every business. Without employees, nothing would function effectively, efficiently, or profitably. Thus, it is important to IntRAtrain to provide you the tools and resources to bring your employees to their optimum performance level so they and you can realize your full potential. That is why we developed this program.

How it Works

It's easy to get started. And, you have options available to you. First, you need to identify the personnel and positions you want to be involved in this system. Then, each employee will complete a Skills Assessment to identify their strengths and where improvement might be indicated. You and/or their direct supervisor will also complete an assessment of the same individual(s). The direct supervisor will do a side-by-side comparison which will indicate where there are differences between the manager's evaluation and the employee's evaluation and the desired skill level. The results will be used in designing an Individual Learning Plan (ILP) for each employee.

If that sounds complicated, don't worry! The assessments and resulting reports are all available on-line. It is easy to do and it results in consistency in evaluations. It will be important for you and the employee to discuss the evaluations and significant differences in attributes.

If your new employee is a salesperson, you will want to refer to the Sales Competency Matrix, included in this manual. The matrix lists the competencies for Work Ethic, Interpersonal Skills, Teamwork, Communication, Results Orientation, Customer Service, Technical Skills, and Sales Knowledge. Then, a description for each of the attributes under the competency is described for the three sales levels: Sales Rep 1, Sales Rep 2, and Sales Rep 3.

Based on the descriptions you will be better able to determine the skill level for the individual and recommend and assign learning courses and experiences. After you have evaluated the individual's attributes and based on your evaluations, you and the employee will agree on the courses necessary to bring them to a desired skill level in the various attributes. From the available library of courses, workshops, and other resources, you and the employee can select those that will have the greatest positive impact on the employee's professional growth. This will then become the Individual Learning Plan for the employee.

Again, don't worry; the courses that comprise the development system for each of the positions are laid out for you in "bundles". All of the courses listed in the bundle can become part of the requirements for training for the individual and can be accessed or scheduled from the learning management system.

After the Individual Learning Plan is completed and the employee is set up in the system, the employee is empowered to take charge of implementing the program and managing their own growth and development. That means they take responsibility for setting up meetings with you, completing courses, attending on-site and web-based instructor-led training, completing projects, etc. This is all laid out for them in their Learner's Guide, which is available for viewing and printing from the website.

Your responsibility is to ensure they stay on track and continue to work toward the goals set up in their Individual Learning Plan. How do you do this? Again, the delivery of the program, including when meetings should be scheduled is laid out for you in a Manager's/Coach's Guide for each of the positions and is available for viewing or printing from the website. Also included is a matrix that illustrates a recommended process for the first year.

You will follow the Guide, using it to monitor the employee's progress and offer constructive feedback and evaluation. This is important because the employee won't know when they've reached their destination if they don't know where they are or how they're doing on this journey. You will be their touchstone when they need advice or encouragement or if they encounter roadblocks.

IntRAtrain Sales Development Program Process Matrix

New Salespeople													
	Type of Activity	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Web conference with Instructor, host													
Meet with Supervisor, expectations, development process	Acct.	Week 1											
Map out and complete Orientation Process	Acct.	Week 1											
Create Individual Learning Plan	Acct.	Week 1-3											
IntRAtrain Web Conference - sales development process	Web, Seller	Last Friday each month											
Complete Fundamentals of IntRAtrain Sell Through Needs and Relationships(STNR)	Online, Seller	Week 3-7											
Web Conference - STNR review, discussion, questions, assignments	Web, Seller		Last Friday each month										
Web Conference - Results, discussion, key activities for this time of year	Web, Seller			Week 10									
IntRAtrain Sell Through Needs and Relationships	Instructor Led session				Week 10-20								
Start 21 day practice	Seller			Week 11-21									
10 days after IntRAtrain Sell Through Needs and Relationships, web conference, results, next steps	Web, Seller			Week 12-22									
Quarterly web sales conferences - sales priorities, challenges	Web, Seller			Last Friday of Month			Last Friday of Month			Last Friday of Month			Last Friday of Month
Push Email Sales Support	Email	1st Monday	1st Monday	1st Monday	1st Monday	1st Monday	1st Monday	1st Monday	1st Monday	1st Monday	1st Monday	1st Monday	1st Monday

IntRAtrain Sales Development Program Process Matrix

Coaches for New Salespeople													
	Type of Activity	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Process review when new person starts	Web, Coach	Week 1											
How to set up an effective ILP	Web, Coach	Week 1											
Reviewing the Sales Process - STNR	Online, Coach	Week 2											
Pre-IntRAtrain Sell Through Needs and Relationships session	Web, Coach		Week 8										
Post-IntRAtrain Sell Through Needs and Relationships session	Web, Coach				Friday after IntRAtrain Sell Through Needs and Relationships training								
Quarterly priorities, getting the most out of salespeople	Web, Coach			3rd Friday of Month			3rd Friday of Month			3rd Friday of Month			3rd Friday of Month
Push Email Sales Coaching Support	Email	1st Monday	1st Monday	1st Monday	1st Monday	1st Monday	1st Monday	1st Monday	1st Monday	1st Monday	1st Monday	1st Monday	1st Monday

COACH'S ACTIVITY GUIDE – NEW SALESPEOPLE

Coach's Activity Guide - The purpose of the Coach's Activity Guide is to minimize the preparation time for your meetings with the learner (new employee) and maximize the effectiveness of those meetings. Your Coach's Activity Guide will also suggest activities that utilize your management skills to reinforce the learning and on-the-job effectiveness of the new salesperson.

One of the things we know about adult learners is that they learn about key concepts and skills through training courses; they learn how to use the concepts and skills by applying them on the job and by talking about their experiences with their manager and their peers. Your Coach's Activity Guide will provide suggestions towards further shortening the learning curve for your new employee.

Learner's Activity Guide – Your new employee will use a Learner's Activity Guide, whose purpose is to guide him/her through the learning and application of the New Salesperson On-Boarding Process. This Learner's Activity Guide places the responsibility for learning and application on the learner (new employee). It directs him/her to the specific activities necessary for to continuously enhance his/her effectiveness. The Learner's Activity Guide will tell the new employee when to schedule meetings with you and the purpose of those meetings.

Coach's Activity	Plan	Date Started	Date Complete
Participate in "Process review when new person starts" Web, Coach	Week 1		
Participate in "How to set up an effective ILP" Web, Coach	Week 1		
Meet with your new salesperson to: <ul style="list-style-type: none"> <input type="checkbox"/> Explain what is expected of him/her as a salesperson. <ul style="list-style-type: none"> • Job Description, including specific responsibilities. • To what are you holding him/her accountable? • Sales activity expectations, such as number of customer contacts each week including phone calls, emails, face-to-face meetings, plans/proposals, and number of calls on prospects. • Use of Key Account Action Plan. • Your role in joint sales calls. <input type="checkbox"/> Explain the orientation process. <ul style="list-style-type: none"> • Who do you want him/her to meet with and what he/she should ask these people? • Who do you want him/her to observe on sales calls? • What do you want him/her to read? • Other orientation. • Review his/her Employee Assessment results. • Talk about strengths first and ask for his/her ideas on how he/she can capitalize on these strengths as a salesperson. • Talk about the largest differences or gaps and ask for ideas on what he/she needs to do to narrow the differences or close these gaps. • Use the IntRAtrain Competency and Resource Matrix to provide suggested resources for narrowing the differences or closing the largest gaps. <input type="checkbox"/> Set up a timetable for completion of his/her Individual Learning Plan (ILP) and a date to meet to review his/her ILP. 	Week 1		
Participate in "Reviewing the Sales Process – STNR" On-line, Coach	Week 2		
Your new salesperson will schedule a meeting with you to review and reach agreement on his/her Individual Learning Plan.	Weeks 1-3		

Meet with your new salesperson to review and reach agreement on his/her Individual Learning Plan.	Weeks 1-3		
Your new salesperson will schedule a meeting with you for after the intrAtrain Web Conference (Note: by reviewing your new salesperson’s Learner’s Activity Guide, you can see when he/she will be asking for a meeting; thus, your guide from this point forward will just include the meetings and the purpose of those meetings).	Weeks 1-3		
Meet with your new salesperson to discuss his/her completed Self- Reflection Worksheet (see Learner’s Activity Guide “Tool Kit”) and to present a summary of the key things he/she learned from the intrAtrain Web Conference. Be ready to offer appropriate customer and prospect background information; suggestions regarding effective sales practices; etc.	Within 3 days of INTRATRRAIN Web Conference		
Meet with your new salesperson to discuss his/her updated Application and Development Log ; his/her completed Self-Reflection Worksheet ; and the summary of the key things learned from the intrAtrain Web Conference. Ask him/her to describe the key concepts and skills learned from intrAtrain Fundamentals of Selling (FOS).	After completion of STNR Within 3 days of INTRATRRAIN Web Conference		
Meet with your new salesperson to identify and complete a Key Account Action Plan for his/her first sales call, which will be a joint sales call with you. Continue doing this with your new salesperson for his/her first five sales calls.	Within 3 days of completing STNR and on-going		
Meet with your new salesperson <u>weekly</u> to discuss his/her updated Application and Development Log and completed Self-Reflection Worksheet . For the meeting after the intrAtrain Web Conference, include discussion of the key things he/she learned from the intrAtrain Web Conference. It is appropriate for you to add items to the agenda, such as progress against goals and expectations; additional learning about your Coop, etc.	Weeks 12 – 24 with option of continuing for 12 months or switching to bi-weekly		

Frequently, on an informal basis, ask your new salesperson: “Which salesperson skills have you used today?” (This will often provide an opportunity for a huddle – a quick, stand up, coaching session).	After completion of STNR and continuously		
Participate in “Pre-IntRAtrain Sell Through Needs and Relationships session” Web, Coach	Week 8		
Participate in “Post-IntRAtrain Sell Through Needs and Relationships (XSS) session” Web, Coach	Friday After completion of XSS		
Meet with your new salesperson so he/she can present and discuss the key concepts and skills from IntRAtrain Sell Through Needs and Relationships and his/her Salesperson Application and Development Log .	After completion of IntRAtrain Sell Through Needs and Relationships		
Go on joint sales calls with your new sales person at least once each week. Make sure he/she has completed a Key Account Action Plan for the call and that you have a copy of the plan before the call.	8 - 52		
Participate in “Quarterly priorities, getting the most out of salespeople” Web, Coach	3rd Friday of Months 3, 6, 9, & 12		
Apply the ideas from “Quarterly priorities, getting the most out of salespeople” as you continue to meet with your new salesperson <u>weekly</u> to discuss his/her updated Application and Development Log and completed Self- Reflection Worksheet . For the meeting after the intRAtrain Web Conference, include discussion of the key things learned from the intRAtrain Web Conference. It is appropriate for you to add items to the agenda such as progress against goals and expectations; additional learning about your Coop, etc.	Weeks 12 – 24 with option of continuing for 12 months or switching to bi-weekly		
Apply key ideas from “Push Email Sales Coaching Support” – First Monday of each month	Months 1 - 12		
Continue to frequently, on an informal basis, ask your new salesperson: “Which salesperson skills have you used today?” (This will often provide an opportunity for a huddle – a quick, stand up, coaching session).	After completion of STNR and continuously		

Sales Competency Matrix

Competency	Sales Rep I	Sales Rep II	Sales Rep III
Work Ethic			
Energy Level	<ul style="list-style-type: none"> Enthusiastic, visible effort, hard work 	<ul style="list-style-type: none"> Enthusiastic, visible effort, hard work 	<ul style="list-style-type: none"> Enthusiastic, visible effort, hard work Is a role model for other Sales Reps
Follow Through	<ul style="list-style-type: none"> May miss deadlines due to over-committing or lack of experience Functions as more of an individual contributor and may not fully use the resources of the team Good administrative organization (returning phone calls, emails in a timely manner) 	<ul style="list-style-type: none"> Is aware of and properly plans for problems or potential delays Tracks progress to assure follow up Organizes work data for quick retrieval Follows through on commitments 	<ul style="list-style-type: none"> Sets well defined goals and timelines and completes tasks ahead of schedule Generates plans that address strategic concerns. Fully utilizes the resources of the team Communications are clear, concise and easily understood
Optimism / Resilience	<ul style="list-style-type: none"> Positive, optimistic, weathers adversity well, able to handle criticism and rejection well, bounces back quickly 	<ul style="list-style-type: none"> Positive, optimistic, weathers adversity well, able to handle criticism and rejection well, bounces back quickly 	<ul style="list-style-type: none"> Positive, optimistic, weathers adversity well, able to handle criticism and rejection well, bounces back quickly
Serious Mindedness	<ul style="list-style-type: none"> Takes pride in doing things well, is business like and professional 	<ul style="list-style-type: none"> Takes pride in doing things well, is businesslike and professional 	<ul style="list-style-type: none"> Takes pride in doing things well, is businesslike and professional
Self Reliance	<ul style="list-style-type: none"> Displays a sense of urgency Wraps up loose ends before closing out projects Errors are typically due to lack of experience 	<ul style="list-style-type: none"> Takes personal responsibility for accuracy/ completeness of work Errors typically are due to underestimating required effort or resources Handles details without getting bogged down 	<ul style="list-style-type: none"> Handles a demanding workload effectively Gets things done!!! Plans for the unexpected and seldom makes errors on critical matters Takes charge and manages issues as opposed to being overwhelmed by them
Quality of Work	<ul style="list-style-type: none"> Takes pride in doing high quality work 	<ul style="list-style-type: none"> Takes pride in doing high quality work 	<ul style="list-style-type: none"> Takes pride in doing high quality work Is a model for others regarding quality of work

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Competency	Sales Rep I	Sales Rep II	Sales Rep III
Interpersonal Skills			
Social Skills	<ul style="list-style-type: none"> • Outgoing • Values and encourages relationships • Enjoys developing customer relationships 	<ul style="list-style-type: none"> • Understands and respects boundaries • Builds a solid base of support • Shows appreciation and concern for others 	<ul style="list-style-type: none"> • Takes an active interest in strengthening rapport • Stays involved at multiple levels within the organization • Values individual differences and other points of view
Positive about People	<ul style="list-style-type: none"> • Balanced outlook regarding people and their intentions • Appeals to all customer segments • Conveys respect and consideration for others 	<ul style="list-style-type: none"> • Conveys respect and consideration of others • Listens carefully to what others are saying and respects their point of view 	<ul style="list-style-type: none"> • Responds sensitively to the feelings of other • Demonstrates patience and respect during difficulties
Influencing/ Assertiveness/ Conflict Management	<ul style="list-style-type: none"> • Takes initiative to address issues • Knows when assistance is needed in dealing with critical issues and is not afraid to ask for help • Communicates a position on important issues 	<ul style="list-style-type: none"> • Presents sound arguments to support positions • Probes effectively to help others determine their needs • Shows poise, even when under pressure 	<ul style="list-style-type: none"> • Directly faces difficult or challenging issues • Expresses important points of view with conviction • Challenges team members when necessary • Uses enthusiasm to create interest and excitement • Builds consensus
Effectively conveying thought or feeling/expressive	<ul style="list-style-type: none"> • Free and easy conversational style • Speaks in a clear and succinct manner 	<ul style="list-style-type: none"> • An active participant in meetings • Can speak effectively to all levels of the organization • Provides information to people at their level of understanding 	<ul style="list-style-type: none"> • Stays involved in multiple levels within the organization • Actively encourages others to express their point of view
Flexibility	<ul style="list-style-type: none"> • Responds well to changing priorities • Handles setbacks without overreacting • Embraces changes as a fact of life 	<ul style="list-style-type: none"> • Willing to compromise to achieve broader goals • Resourceful • Able to work with a variety of personality styles • Builds win/win relationships 	<ul style="list-style-type: none"> • Actively seeks and promotes diverse ideas and input • Encourages flexibility and adaptability in others • Works with others to determine the best way to do things or reach goal

Sales Competency Matrix

Competency	Sales Rep I	Sales Rep II	Sales Rep III
Teamwork			
Accommodating	<ul style="list-style-type: none"> Keeps team members well informed 	<ul style="list-style-type: none"> Works with team members to develop and agenda with priorities and commitments clearly defined 	<ul style="list-style-type: none"> Holds SELF and others accountable for their contribution and performance
Supportive	<ul style="list-style-type: none"> Keeps team members well informed 	<ul style="list-style-type: none"> Shares ideas and solicits input from team members 	<ul style="list-style-type: none"> Places team needs ahead of personal needs
Collaborative	<ul style="list-style-type: none"> Volunteers to become involved in new projects/activities 	<ul style="list-style-type: none"> Capitalizes on the strengths of others in order to gain efficiency and improve performance 	<ul style="list-style-type: none"> Challenges the thinking and direction of the team to ensure they have looked at all possibilities

Sales Competency Matrix

Competency	Sales Rep I	Sales Rep II	Sales Rep III
Communication			
Informing	<ul style="list-style-type: none"> Speaks in a clear and succinct manner Gives well planned, organized instructions and presentations 	<ul style="list-style-type: none"> Avoids overexplaining or overpowering the listener with information Provides information to people at their level of understanding Actively participates in meetings 	<ul style="list-style-type: none"> Outstanding presentation skills Confidently handles questions and challenges when in front of a group Anticipates critical issues before they come up in meetings
Listening	<ul style="list-style-type: none"> Avoids interrupting or cutting people off Remains open-minded Avoids distractions that might disrupt or interfere with the flow of communication 	<ul style="list-style-type: none"> Uses appropriate nonverbal behavior to convey interest and understanding Encourages others to express their point of view Actively paraphrases or restates the speaker's points in order to confirm understanding 	<ul style="list-style-type: none"> Able to summarize other viewpoints and crystallize an action plan Clearly understands and articulates the differences in others points of view and seeks to minimize misunderstanding
Written Communication	<ul style="list-style-type: none"> Writes in a clear, concise manner Makes proper use of grammar, spelling and punctuation Uses spell check and others tools to minimize the possibility of writing errors Proof reads what he/she has written 	<ul style="list-style-type: none"> Organizes documents logically Writes for the reading level of the audience Demonstrates good command of language 	<ul style="list-style-type: none"> Capable of explaining and summarizing complex concepts or strategies clearly and succinctly in writing Writing enhances understanding of the reader vs. providing further confusion
Informing	<ul style="list-style-type: none"> Speaks in a clear and succinct manner Gives well planned, organized instructions and presentations 	<ul style="list-style-type: none"> Avoids overexplaining or overpowering the listener with information Provides information to people at their level of understanding Actively participates in meetings 	<ul style="list-style-type: none"> Outstanding presentation skills Confidently handles questions and challenges when in front of a group Anticipates critical issues before they come up in meetings
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Sales Competency Matrix

Written Communication	<ul style="list-style-type: none">• Writes in a clear, concise manner• Makes proper use of grammar, spelling and punctuation• Uses spell check and others tools to minimize the possibility of writing errors• Proof reads what he/she has written	<ul style="list-style-type: none">• Organizes documents logically• Writes for the reading level of the audience• Demonstrates good command of language	<ul style="list-style-type: none">• Capable of explaining and summarizing complex concepts or strategies clearly and succinctly in writing• Writing enhances understanding of the reader vs. providing further confusion
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Competency	Sales Rep I	Sales Rep II	Sales Rep III
Results Orientation			
Accountability	<ul style="list-style-type: none"> • Takes ownership of his/her mistakes and works quickly to correct them 	<ul style="list-style-type: none"> • Takes personal responsibility to produce work that is error free 	<ul style="list-style-type: none"> • Holds self and others accountable for producing high quality professional I work product
Action Oriented	<ul style="list-style-type: none"> • Gets right to work on projects and assignments 	<ul style="list-style-type: none"> • Organizes work for quick retrieval to ensure responsiveness to the customer • Plans work process for optimal efficiency • Ensures work goal is clearly defined to reduce the need for “re-work” 	<ul style="list-style-type: none"> • Sets well defined goals, timelines and work processes • Communication is clear, concise and easily understood • Plans work effort for optimal productivity and speed of execution
Problem Solving	<ul style="list-style-type: none"> • Draws in appropriate resources to resolve issues • Actively participates in problem solving sessions 	<ul style="list-style-type: none"> • Separates symptoms from core problems • Rigorously pursues information • Recognizes and acts on early warning signs 	<ul style="list-style-type: none"> • Balances short-term, immediate needs with the broader business factors • Sees the implications of decisions
Time Management	<ul style="list-style-type: none"> • Uses time efficiently • Does not waste time • Completes administrative work in a timely manner • Handles details without getting bogged down 	<ul style="list-style-type: none"> • Prioritizes and spends time on the most important tasks • Stays with a routine task until it is completed to ensure it is done quickly 	<ul style="list-style-type: none"> • Develops plans and processes to ensure necessary work is completed on schedule, on budget and meets or exceeds customer requirements

Sales Competency Matrix

Competency	Sales Rep I	Sales Rep II	Sales Rep III
Customer Service			
Customer Focus	<ul style="list-style-type: none"> • Stays visible and involved • May overlook important customer needs and requirements due to lack of experience • Puts customer first at all times 	<ul style="list-style-type: none"> • Responds directly to customer objectives and concerns • Displays a sense of urgency to customer needs • Recognizes subtle differences between customers 	<ul style="list-style-type: none"> • Customer feels that they are this person's primary accountability • Actively solicits feedback regarding how the company can improve its support and service • Has an outstanding understanding of customer needs and the market
Questioning/ Probing	<ul style="list-style-type: none"> • Has a general understanding of customer problems and concerns • May fail to probe deeply and analyze information to understand the real issues • May jump to conclusions or allow bias and personal preference to influence understanding customer needs • May be reluctant to receive customer feedback out of concern it will reflect negatively 	<ul style="list-style-type: none"> • Separates symptoms from core problems • Makes effective use of questions and probes for detail • Encourages customer feedback 	<ul style="list-style-type: none"> • Summarizes points in order to seek confirmation • Encourages customers to express their point of view
Suggesting	<ul style="list-style-type: none"> • Recommends product and services based on what customer states they need 	<ul style="list-style-type: none"> • Gathers information on customer needs before making product or service recommendations • Always demonstrates the value of the product or service in comparison to the cost 	<ul style="list-style-type: none"> • Able to subtly persuade • Determines exactly what the customer needs or expects and always exceeds their expectations regarding performance and service
Customer Satisfaction	<ul style="list-style-type: none"> • Responds directly to customer requests • May miss opportunities to "steer" the customer regarding product or service expectations. 	<ul style="list-style-type: none"> • Probes for additional needs they may not be expressed or known by the customer. • Ensures that the organization supports all the needs of the customer and adds value at every level of the transaction 	<ul style="list-style-type: none"> • Understands the spoken and unspoken needs of customers and can read the subtle inferences. • Ensures customer knows they are number one with the company and received the right product or service at the right time and at the right price

Sales Competency Matrix

Competency	Sales Rep I	Sales Rep II	Sales Rep III
Technical Skills			
<ul style="list-style-type: none"> • Technical Abilities 	<ul style="list-style-type: none"> • Possesses the basic technical skills to perform the job • Devotes appropriate time to learning new skills and competencies to improve performance and productivity 	<ul style="list-style-type: none"> • Demonstrated competency in all technical aspects of the job • Focuses on continual improvement of technical skills and staying current with emerging trends and requirements 	<ul style="list-style-type: none"> • Mastery of all technical aspects of the job • Frequently trains new or inexperienced Sales staff to improve their knowledge and skill
<ul style="list-style-type: none"> • Product/Service Knowledge 	<ul style="list-style-type: none"> • Possesses basic knowledge of product or services • May miss sales opportunities due to lack of knowledge and / or skill in selling the product or service • Dedicated to continually improving knowledge level • Asks good questions of more experienced staff • Knows when to bring in more experienced staff to support sales effort 	<ul style="list-style-type: none"> • Demonstrated competency and understanding of all products and services and the best approach to sell these to customers. 	<ul style="list-style-type: none"> • Demonstrated mastery of product and services • Frequently trains new or inexperienced staff, or is brought in to support their sales efforts • Understands the direction the market / industry is moving and what changes will be required in product or services to remain competitive
<ul style="list-style-type: none"> • Computer Skills 	<ul style="list-style-type: none"> • Possesses requisite computer skills to handle all aspects of the job • Devotes appropriate time to learn additional skills that are required 	<ul style="list-style-type: none"> • Possesses requisite computer skills to handle all aspects of the job • Devotes appropriate time to learn additional skills that are required 	<ul style="list-style-type: none"> • Possesses requisite computer skills to handle all aspects of the job • Devotes appropriate time to learn additional skills that are required

Sales Competency Matrix

Competency	Sales Rep I	Sales Rep II	Sales Rep III
Sales Knowledge			
Prospecting	<ul style="list-style-type: none"> • Is developing an understanding of the market and customer base • May miss sales opportunities due to lack of market opportunity or failure to ask for referrals • Has a limited network due to level of experience and time in the market • Tends to focus sales efforts on known customers 	<ul style="list-style-type: none"> • Has a solid understanding of the market and where the opportunities for growth are • Asks customers for leads, follows up on referrals and able to make cold calls effectively • Organizes territory and studies it systematically • Spends time every month contacting lost or infrequently serviced customers to identify new opportunities 	<ul style="list-style-type: none"> • Comprehensive knowledge of market, customer base and areas of greatest growth opportunity • Continually aware of changes that are occurring in the marketplace and the opportunities these present to grow the business • Conducts systematic research to find new businesses to call on • Pre-qualifies sales prospects to ensure the most effective use of time and limited resources
First Impression	<ul style="list-style-type: none"> • Makes a positive first impression • May have a tendency to be “too eager” or over-talk • Could turn off customers if they feel he/she is all talk and no-action • Needs to establish credibility through outstanding service • Talks more than listens 	<ul style="list-style-type: none"> • Extremely positive impression with current and prospective customers • Professional, knowledgeable and service oriented • Able to relate to customers at all levels • Listens more than talks 	<ul style="list-style-type: none"> • Outstanding professional image and knowledge and service orientation • Able to read the subtle differences between customers and react accordingly • Varies approach to meet the needs of the customer
Overcoming Objections	<ul style="list-style-type: none"> • Responds to objections when they have been clearly articulated by the customer • May mis-read cues or buying signs due to lack of experience • May try to make excuses for non-performance or over-explain as oppose to actively listening and implementing appropriate changes to improve service. 	<ul style="list-style-type: none"> • Able to pick up on subtle cues from customer indicating dissatisfaction or reluctance to buy and changes approach accordingly • Actively listens to the customer and totally understands their needs before proposing solutions 	<ul style="list-style-type: none"> • Anticipates customer objections and needs and reflects these in the sales presentation • Can read very subtle signs from customer and responds immediately and appropriately • Outstanding listening skills

Sales Competency Matrix

<p>Convincing</p>	<ul style="list-style-type: none"> • Presents sound arguments to support recommendations • May “tell more than sell” 	<ul style="list-style-type: none"> • Probes effectively to help others identify needs they did not know they had • Uses enthusiasm to create interest and excitement • Presents new ideas or options in a convincing manner. Ensures that proposal meets all the needs of the customer 	<ul style="list-style-type: none"> • Knows the key decision makers and the issues that need to be addressed or resolved. Structures proposal to meet/exceed these requirements • Extremely comfortable around senior management and able to build consensus to achieve commitment to action
<p>Closing Skills</p>	<ul style="list-style-type: none"> • Asks for the sale • May choose poor timing to close the sale and leave opportunities on the table. 	<ul style="list-style-type: none"> • Knows when the time is right to ask for the sale • Ensures that all critical issues are addressed and that there is a commitment from the customer • Follows up on all commitments to build credibility 	<ul style="list-style-type: none"> • Never overlooks an opportunity to cross sell other products or services before the sale is closed. • Ensures that the customer is delighted with product service and support • Actively seeks referrals and references to other customers