

Sales Performance Assessment™

SPA Development Report

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Welcome to the **Sales Performance Assessment™**! The Sales Performance Assessment (SPA) is a powerful process of personal development designed to provide feedback to you on 24 sales practices, based on your own perspective of how you approach your sales role.

To help you understand the degree to which you are currently using these 24 sales practices, your scores were compared to a large sample of salespeople who have completed the Sales Performance Assessment™ Self Questionnaire. Your scores are expressed in terms of percentiles based on this norm group. Thus, a score of 75% implies that you scored higher than 75% of salespeople in the normative sample (and, conversely, that you scored the same as or lower than 25% of these salespeople). The specific norms that have been used are:

Norm Group: North America n=12063 (Jan2012)

Presented by: **Management Research Group, Inc™**

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**WHAT THIS REPORT CONTAINS:
REPORT FLOW CHART**

INTRODUCTION

Orientation to questionnaire purpose & feedback



SUMMARY PROFILE

See all your scores at a glance



UNDERSTANDING THE SALES PRACTICE

Expanded information on Sales Functions & Sales Practices



EXPLORING YOUR FEEDBACK

Interpreting your profile using combinations of Sales Practices



ESTABLISHING PRIORITIES FOR SUCCESS

Examine which sales practices are critical for your role at your organization



TAKING ACTION ON YOUR GOALS

Use your feedback to create an action plan

Introduction

The **Sales Performance Assessment™ (SPA)** is based on the principle that your development is substantially assisted by your own insight. The SPA Development Report provides you with feedback on the practices or behaviors that need to be sustained, strengthened or modified to enhance your sales effectiveness, and the motivations or drivers that characterize your unique approach to your sales role.

The attitude you have toward feedback will strongly influence the benefit of this report. Please keep the following advice in mind:

- **Use the information as a developmental aid.** Avoid viewing your feedback as the final word on your performance; instead, use it to help plan tactics and strategies to enhance your future effectiveness.
- **Your feedback profile identifies both behaviors and drivers.** Behaviors can be changed, and drivers can be understood and used to leverage performance and enhance personal satisfaction; thus, **you have control** over the factors that can help you reach maximum effectiveness as a professional salesperson.
- **Trust the feedback profile's description of your approach to the sales role.** The SPA Self Questionnaire is a proven, professional instrument that shows how individuals actually behave in sales roles.
- **Do not view high scores as "good" and low scores as "bad."** A given sales orientation is rarely all positive or all negative. For example, a high score on Empathy indicates sensitivity to and concern for other people. Alternatively, the strongly empathetic salesperson may run the risk of becoming too close to customers, perhaps losing objectivity and having difficulty dealing with conflict.
- **Recognize that the aim of the Sales Performance Assessment™ process is to help you achieve your goal of increased sales effectiveness.** Your development as a professional salesperson will be enhanced through (1) recognizing your strengths, weaknesses and motivations, and (2) designing strategies to enhance strengths, address weaknesses, and use your motivations to your advantage.

The following page presents the profile of your scores on the 24 sales practices measured by the Sales Performance Assessment™.

Summary Profile

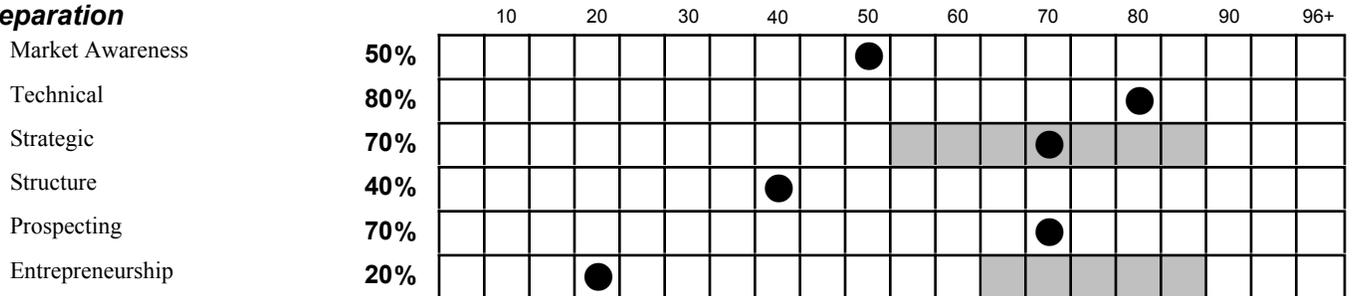
On following page is a one-page profile which shows your scores on all of the sales practices measured by the Sales Performance Assessment™. This Summary Profile will provide you with an overview of your current approach to your sales role, and the following pages will provide you with more in-depth information about each one of the sales practices in your profile.

Sales Performance Assessment™

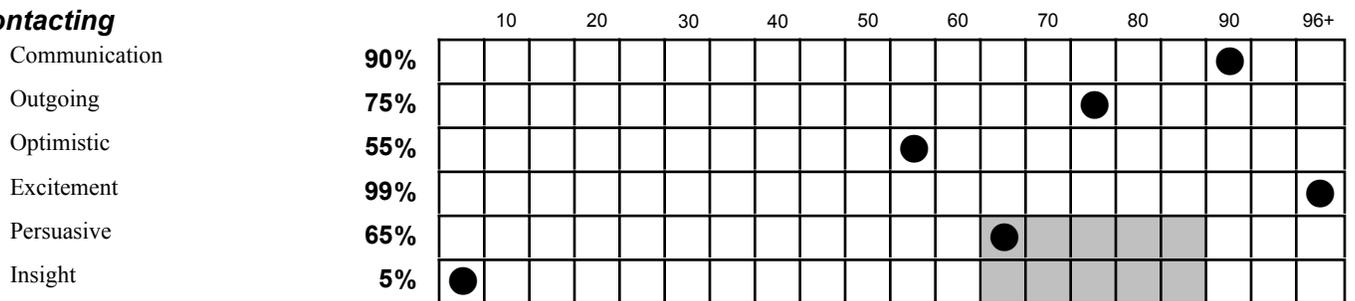
Summary Profile



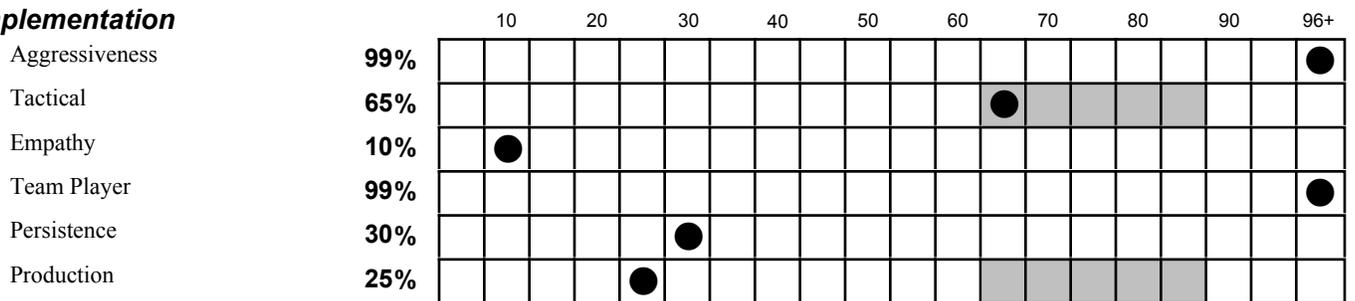
Preparation



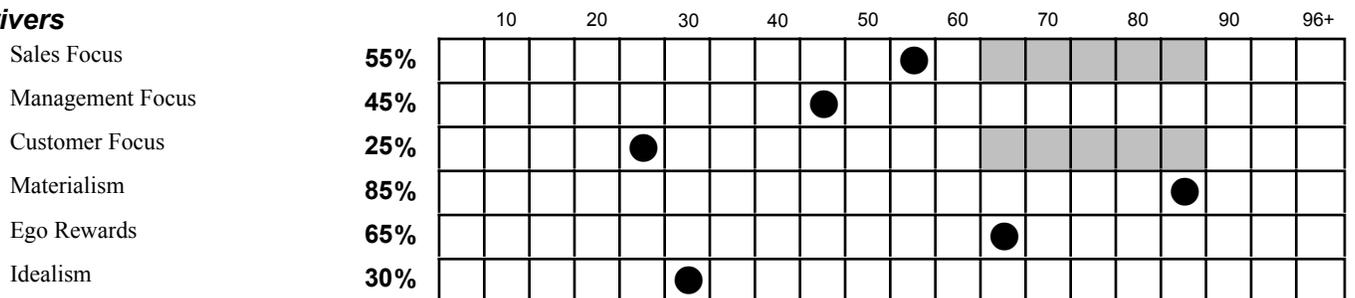
Contacting



Implementation



Drivers



Understanding the Sales Practices

The following pages provide a detailed description of each of the sales practices measured in your profile. These descriptions will help you to gain a better understanding of your approach to sales, as well as its strengths and limitations.

Profile Elements

Please keep the following information in mind as you proceed through this section of your report:

Your scores represent your own perspective. Each feedback scale shows your score as a percentile, and provides brief descriptions of the behaviors that characterize both high and low scores. Also included are a list of Potential Assets and Potential Liabilities associated with both high and low scores, in order to provide you with more interpretive information on each of the sales practices. Each page of this section also presents the opportunity for you to consider the importance of the sales practice in your current sales role, and to make notes or comments.

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PREPARATION

It requires preparation and planning to target and capture new markets - as well as to keep pace with existing ones. Customers, products and competitors are constantly changing. It is a challenge for every salesperson to search for, find and use the appropriate information to plan his or her sales efforts.

Salespeople need to have more than just market awareness and information, however. They need to know their products and services - their solutions. Some products do not require great technical sophistication, while others do. In certain situations, the lack of such technical knowledge may be the crucial reason one loses a sale.

Thinking about and planning a sales approach also requires some degree of strategy and analysis. Sales professionals have a finite amount of time and energy to expend; therefore, they must structure and organize their efforts.

Channeling energy into generating leads and finding prospects is a critical factor for achieving success for many sales professionals. Prospecting may also require some ingenuity and risk taking in order to find new ways to go after markets and potential customers.

Successful sales professionals know the value of being prepared and keeping one's market and prospects clearly in sight as the sales process unfolds.

The six Sales Practices associated with Preparation are:

MARKET AWARENESS

TECHNICAL

STRATEGIC

STRUCTURE

PROSPECTING

ENTREPRENEURSHIP

Market Awareness

Understanding market trends and analyzing customer buying patterns.



This sales practice measures the degree to which salespeople emphasize the importance of being in touch with market trends, as well as knowing as much information as possible about customer buying patterns. People who score high on Market Awareness take an analytical approach to the market. They believe in seeking and using any information available to them, including that supplied by market research. They take pride in knowing what is going on in the marketplace.

Salespeople who score low do not take this analytical approach to understanding the market. They may go into the field and take their chances with what they find. They may be skeptical of how much can be foretold, as opposed to discovered through direct experience.

LOWER SCORES:

Potential Assets

- May be more practical than theoretical
- May depend upon personality power
- May be good at personalizing a sales approach
- May be highly intuitive and instinctive

Potential Liabilities

- Not up-to-date on market trends
- Shallow understanding of the market
- May be at a disadvantage with highly knowledgeable customers
- May use obsolete information

HIGHER SCORES:

Potential Assets

- Studies market systematically
- Understands customers' buying patterns
- Knows what competitors are doing
- Finds opportunities
- Explains trends to the customer

Potential Liabilities

- Can over-analyze the market
- May be too busy studying to take action
- May miss business implications
- May know theory but not people
- May have difficulty converting knowledge into sales

How important is this behavior in your current sales role?

High

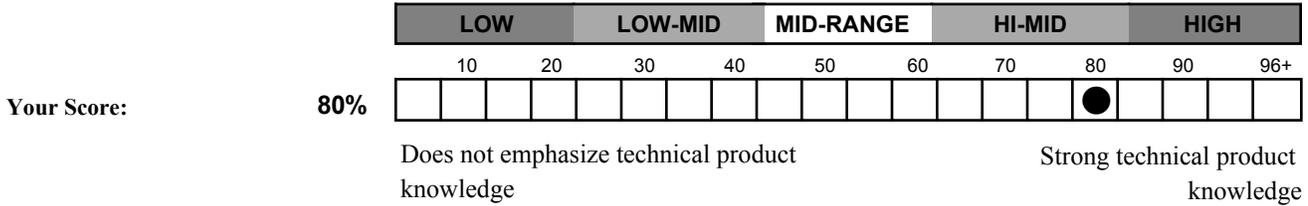
Medium

Low

Comments:

Technical

Having an in-depth knowledge of the products/services, and selling on the basis of product/service expertise.



People who score high on Technical take a good deal of pride in the extent of their product knowledge. They like to see themselves as having an in-depth understanding of how their products or services work. Often they are appreciated by technically-oriented customers, who tend to be skeptical of people who try to bluff their way through without this in-depth knowledge.

People who score low are likely to have relatively little interest in the technical underpinnings of the product/service. Either their product line may not require an in-depth technical understanding, or they may feel that they know enough to sell it, and that is good enough for them.

LOWER SCORES:

Potential Assets

- May be more customer-oriented
- May be more practical
- May see long-term strategic issues
- May utilize outside expertise

Potential Liabilities

- May give unconvincing presentations
- May be unaware of strengths/weaknesses of competitors' products
- May lack sufficient product/service knowledge
- May be overwhelmed by highly technical customers

HIGHER SCORES:

Potential Assets

- Strong product/service knowledge
- Projects an air of expertise
- Can field tough questions
- Helps solve difficult/complex problems

Potential Liabilities

- May overwhelm non-technical customers
- May get lost in a maze of technical issues
- May use technical knowledge as a crutch to avoid more important questions
- May lose sight of overall goals

How important is this behavior in your current sales role?

High

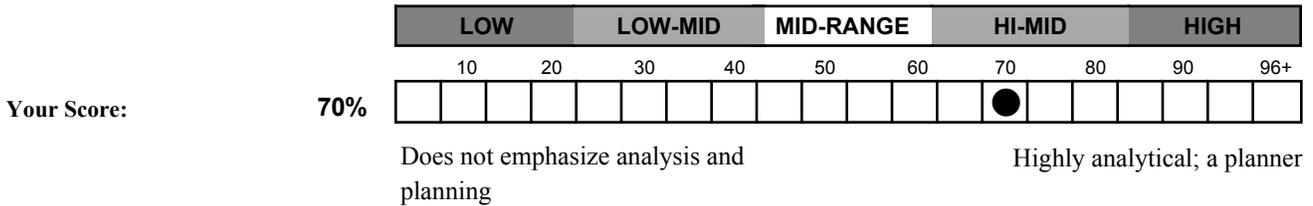
Medium

Low

Comments:

Strategic

Taking a planned and logical approach to selling; analyzing and solving complex problems for the long term.



Sales strategists are the people who believe in taking a logical and comprehensive approach to the sales process. They like to work from sales plans and build in contingency arrangements. These planners/analysts are likely to spend a fair amount of time in the office preparing for meetings and presentations. When addressing customers, they do not like to find themselves feeling unprepared and having to improvise their answers. They like working with complex issues and pride themselves on their ability to create long-term strategies.

Low scores are associated with people who tend to be a good deal more spontaneous and intuitive in their approach to the selling process. They may not believe that selling is facilitated by analyzing and planning.

LOWER SCORES:

Potential Assets

- May be a hands-on achiever
- May focus on interpersonal aspects
- May pursue closing the sale earlier in the process
- May have a more practical technical approach

Potential Liabilities

- May miss subtle cues
- Doesn't plan ahead
- May miss the implications of his/her promises
- May not understand customers' long-term issues
- May have difficulty dealing with complex problems

HIGHER SCORES:

Potential Assets

- Long-term planner
- Incisive thinker
- Analytical problem solver
- Sees customers' problems
- Plans development of territory/targets

Potential Liabilities

- May be too theoretical
- May have difficulty conveying enthusiasm
- May do too much thinking, too little doing

How important is this behavior in your current sales role?

High

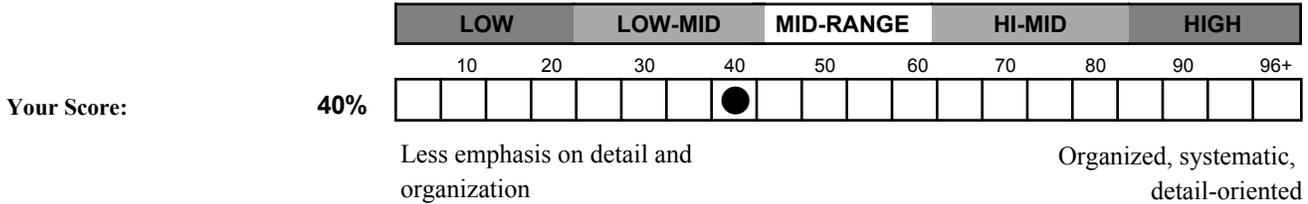
Medium

Low

Comments:

Structure

Taking an organized and systematic approach to selling, and feeling comfortable with the administrative aspects of the role.



Salespeople who score high on Structure are organized and systematic. Their sales approach will be orderly and consistent. They tend to prefer to follow detailed sales plans - either those that they create themselves, or those that are created by their organization. They understand that the selling process includes an element of organization and administrative work, and they will complete this work in an accurate and methodical way.

Salespeople who score low tend to emphasize the importance of spontaneity in their approach to sales. They are not especially interested in the administrative aspects of their jobs. They have to force themselves to take care of what they may consider to be the least critical dimension of successful selling.

LOWER SCORES:

Potential Assets

- May be intuitive and creative
- May be flexible
- May be quick on one's feet
- May be quick to recognize opportunities

Potential Liabilities

- May cause administrative problems
- May promise without delivering
- May be inconsistent
- May fail to cover territory systematically

HIGHER SCORES:

Potential Assets

- Keeps administrative work up-to-date
- Is organized and systematic
- May have potential for administrative management
- Pays attention to details

Potential Liabilities

- May have a tendency towards rigidity
- May get into a rut
- May lose sight of overall goals
- May have trouble shifting gears in front of a customer

How important is this behavior in your current sales role?

High

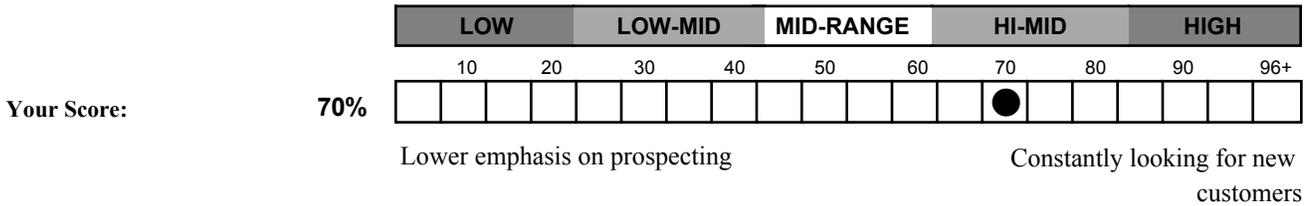
Medium

Low

Comments:

Prospecting

Devoting attention to the process of finding potential customers by developing contacts, using referrals and pursuing leads.



Salespeople who score high on Prospecting generally try to keep many leads in the pipeline. They do not hesitate to ask for such leads from friends, relatives, bosses, or customers. They emphasize the importance of numbers in achieving a certain percentage of sales conversions. They try to make sure that they always have enough people to call on. As a result, they are constantly looking to expand their contacts, generate referrals and pursue leads.

People who score low may not need to keep a large backlog of prospects because of the nature of their job; or, they may feel that they can find potential customers when the need arises.

LOWER SCORES:

Potential Assets

- Not needed in some sales situations
- May nurture existing customer base
- May be concerned with quality, not quantity of prospects
- Pays more attention to other types of sales activities

Potential Liabilities

- Pipeline can dry up
- May be overly complacent
- May lose touch with market trends
- May be too dependent on existing customers
- Cannot afford to lose any prospects

HIGHER SCORES:

Potential Assets

- Appreciates new market opportunities
- Stays active, rather than becoming complacent by staying with current customers
- Constantly adding new leads

Potential Liabilities

- Can waste time on the wrong prospects
- May spend more time generating leads than following through on making the sale and developing existing customers
- Those asked for referrals may feel exploited, resentful
- Must have comparable interpersonal skills, or ends up simply making prospect lists

How important is this behavior in your current sales role?

High

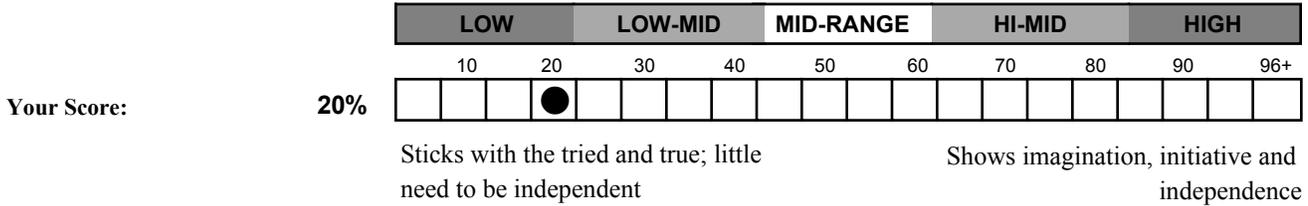
Medium

Low

Comments:

Entrepreneurship

Acting as an independent business professional; viewing the sales role in a creative fashion; willing to take risks and pursue things independently.



Entrepreneurs are especially likely to follow their own star. While they may have some identification with their organizations, they may secretly see themselves as independent business people. They perceive themselves as innovators and idea people, and may devise creative approaches to their products and customers. They delight in having product lines which are new and original. They feel comfortable taking risks.

People who score low may prefer to work in an organization where there are some guidelines and predictability. They do not see themselves as independent, creative risk-takers.

LOWER SCORES:

Potential Assets

- May be a good team player/company person
- May make good use of experience and established procedures
- May be careful, cautious
- May focus on what has worked well in the past

Potential Liabilities

- Can get into a rut
- Does not challenge the status quo
- May be too hesitant - May miss opportunities
- May be too easy in negotiating

HIGHER SCORES:

Potential Assets

- Creative - Open to new ideas
- Independent
- Shows great initiative in new markets
- A risk-taker

Potential Liabilities

- May be difficult to manage
- May be impulsive - May not think through implications
- Likely to be unhappy with corporate restrictions
- May discount past experience and end up reinventing the wheel

How important is this behavior in your current sales role?

High

Medium

Low

Comments:

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CONTACTING

Once prepared with product, market and customer knowledge, it is necessary to make contact and begin the process of producing sales.

This part of the sales process requires making a good first impression on the customer. Salespeople need to feel reasonably comfortable in meeting new people and establishing contact with them. Whether the contact is made in person or with the aid of technology, there are often numerous obstacles to bypass in order to get to the "right" person and make the appropriate impact.

Many sales processes rely on building excitement about the value of the product or service and its potential for meeting the needs of the customer. This may imply having good business instincts, providing sufficient information, and presenting a solution in a convincing manner.

How much emotion, persuasion and information is used may vary depending on the sales situation, but the success of the sale is greatly influenced by the quality of the sales person's behaviors at the point of customer contact.

The six Sales Practices associated with Contacting are:

COMMUNICATION

OUTGOING

OPTIMISTIC

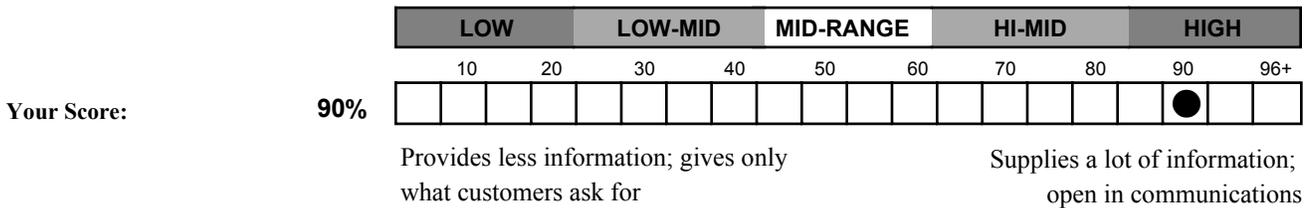
EXCITEMENT

PERSUASIVE

INSIGHT

Communication

Providing clear and adequate information to customers and being open with them.



Salespeople who score high on Communication emphasize the importance of being articulate with customers and keeping them informed about products and services. They are often quite open in what they say and have great faith in the power of communication.

Salespeople who score low may believe that talking can sometimes work to one's disadvantage - one can talk oneself out of a sale. They prefer not to overwhelm people with information; they may take a more narrow and focused approach to communication.

LOWER SCORES:

Potential Assets

- Does not waste time just talking
- May be willing to listen
- May be able to influence in a subtle fashion
- May sell with actions, not words
- Less likely to talk at the wrong time

Potential Liabilities

- May not keep customers well-informed
- May appear to be too reserved or easygoing
- May not sell customers enough
- May move too quickly and not spend enough time with customers
- Customers may feel something is being hidden

HIGHER SCORES:

Potential Assets

- Educates and informs the customer
- Develops customer loyalty
- Easy for customers to deal with
- Provides extensive product information

Potential Liabilities

- May overwhelm customers with information
- May talk too much
- May not set appropriate priorities
- May not be focused enough in communication
- May reveal information not intended for the customer

How important is this behavior in your current sales role?

High

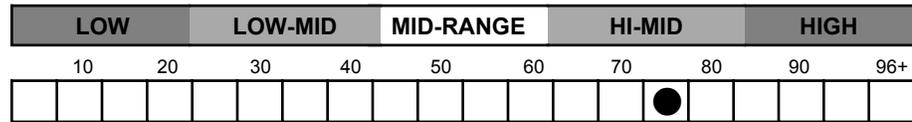
Medium

Low

Comments:

Outgoing

Acting in a friendly, accepting, and informal manner with customers and others.



Your Score:

75%

Does not show easy familiarity in relations

Friendly, reaches out to others; forms relationships easily

Salespeople who score high on Outgoing emphasize the interpersonal aspects of selling by turning potential customers into friends. They are affable, gregarious and informal, and expect others to like them. They get to know people easily, and may seek to establish reciprocity in relationships.

Salespeople who score low are unlikely to feel that their success in selling is directly proportional to their friendliness. Instead, they may emphasize other elements such as planning or product knowledge.

LOWER SCORES:

Potential Assets

- May be helpful in technical roles
- May be analytic, objective
- May be less vulnerable to rejection
- May have a high level of endurance

Potential Liabilities

- May have trouble engaging customers
- May have difficulty handling the emotional aspects of sales
- May be too dependent upon a few customers
- May take rejection too seriously
- May come across as too reserved or formal

HIGHER SCORES:

Potential Assets

- Makes friends easily with customers
- Interacts well with a wide range of customers
- Can get a good response from others in the company
- May project a positive, welcoming attitude
- Has a basic ability to engage others

Potential Liabilities

- May not be practical enough
- May alienate highly reserved customers
- May depend too much on being "friendly"
- May move more slowly to close a sale
- May not be objective in evaluating a customer's potential

How important is this behavior in your current sales role?

High

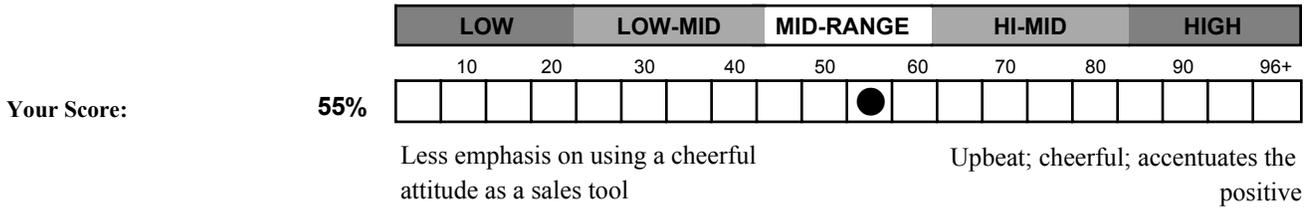
Medium

Low

Comments:

Optimistic

Maintaining a positive attitude; demonstrating an upbeat, cheerful manner.



High scores on Optimistic are associated with individuals who emphasize the importance of taking a positive and upbeat approach to life and work. They have observed that people are more likely to give a positive response when in a good mood, and they try to bring about that mood. They try to avoid feeling pessimistic or negative. They expect to be successful with the next customer, even if they lost the last one. They tend to assume that things will turn out well. They emphasize the positive quality of their products or services and, in their optimism, may promise that a product will do something without being completely sure that it will. They try to portray themselves in a cheerful light regardless of the circumstances.

Individuals who score low are less likely to expect the best possible outcome in every situation. They may pride themselves on the fact that they are more tough-minded. They may be much more realistic in their approach, avoiding the pitfalls of an overly hopeful mentality.

LOWER SCORES:

Potential Assets

- Likely to be more realistic
- Tends to avoid disappointment
- May be viewed as sincere
- May sympathize with customer problems

Potential Liabilities

- May appear negative or ungrateful
- May miss opportunities
- Has difficulty acting happy when isn't

HIGHER SCORES:

Potential Assets

- Upbeat - Conveys confidence
- Presents materials positively
- Gives customers a lift
- Makes sales by accentuating the positive

Potential Liabilities

- May appear superficial
- May be unrealistic in appraising problems
- May not look at products in depth

How important is this behavior in your current sales role?

High

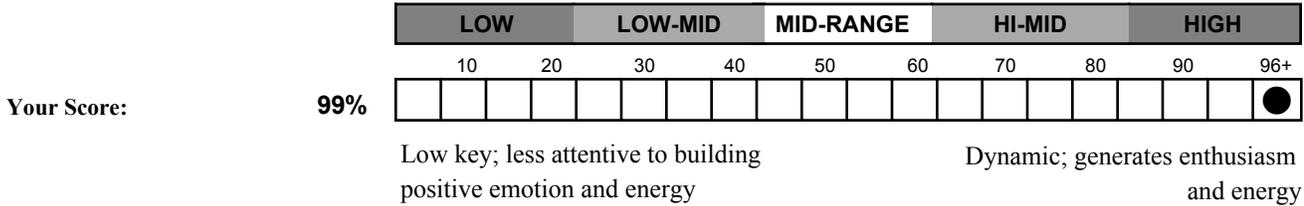
Medium

Low

Comments:

Excitement

Using emotional intensity and energy to build enthusiasm and excitement in oneself and others.



Individuals who score high on Excitement are likely to be rather dynamic salespeople. They pay a great deal of attention to the emotional dimensions of an encounter. They tend to be intense, spontaneous, and emotionally expressive. They like to interact with people in a way that ensures that others will remember them. They use their emotional impact to create enthusiasm for their products and services, as well as for themselves.

Low scores are associated with individuals who are less intense and tend to use a low-key, understated approach. They may believe that their customers do not have to be engaged on an emotional level in order to respond well to their products and services. They may also feel that being too dramatic may detract from the image they are trying to convey of themselves and what they are selling.

LOWER SCORES:

Potential Assets

- May be less vulnerable to rejection
- May be quietly competent
- May seem mature, stable
- May be steady under pressure

Potential Liabilities

- May not be expressive enough
- May lack interpersonal impact
- May not be dramatic enough
- May be uncomfortable with the emotional element of sales

HIGHER SCORES:

Potential Assets

- Makes dynamic presentations
- Identifies with the product/service
- Can get customers to be enthusiastic and committed
- Very effective when combined with a strong marketing plan

Potential Liabilities

- May be overly sensitive, vulnerable to rejection
- May be unrealistic
- May inflame a tense situation
- May try to sell emotionally in settings where a more reserved manner is needed

How important is this behavior in your current sales role?

High

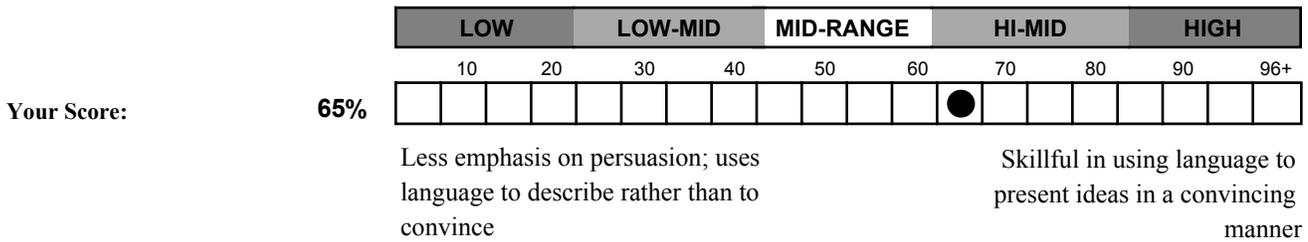
Medium

Low

Comments:

Persuasive

Actively focusing on convincing, persuading and negotiating in a compelling way.



People who score high on Persuasive believe in using persuasive language to make a compelling, convincing case for their positions. They have confidence in their ability to present their product line and ideas attractively. They are sensitive to and knowledgeable about the political realities of the sales process, and they will use this to their advantage. They can often be effective negotiators.

Individuals who score low are not inclined to try to persuade and convince customers. They tend to want others to judge their actions rather than their words. They may feel that their product or service can sell itself by virtue of its features, rather than needing a persuasive effort to make the sale. Or, they may assume (sometimes mistakenly) that others understand and share their ideas, and there is no real need for persuasion. Their style may be perceived as sincere and candid, or as overly direct and blunt. However, they may find that they do not have as much impact or influence on their customers as they desire.

LOWER SCORES:

Potential Assets

- May be seen as quite sincere
- Uses other methods of interpersonal influence
- May take a more planned, organized approach
- May develop deeper relationships with customers

Potential Liabilities

- May not do well with strongly persuasive customers
- May rely too much on sales aids rather than interpersonal influence
- May not recognize opportunities for influencing
- May be too inclined to make concessions instead of trying to influence the customer

HIGHER SCORES:

Potential Assets

- Can be compelling and convincing
- Can market ideas well
- May be a good negotiator
- Can convince customers to buy

Potential Liabilities

- May neglect some of the details
- May be seen as too glib or slick
- May be less prepared and depend too much on persuasive skills
- May talk when should be listening

How important is this behavior in your current sales role?

High

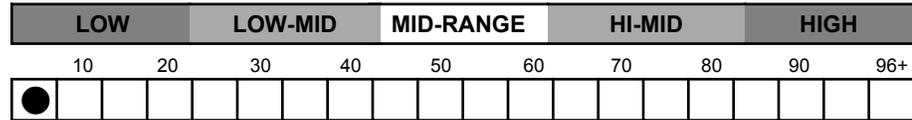
Medium

Low

Comments:

Insight

Perceptive in reading people and situations, and adept at using this knowledge to determine customers' needs and identify sales opportunities.



Less attentive to reading people and opportunities

Perceptive; looks beneath the surface

Salespeople who score high on Insight feel that they are adept at reading people and situations. They will adapt to customer needs, and they have an instinct for what to say. These individuals quickly recognize when opinions or options have shifted, and they respond with corresponding shifts of their own. They are very alert to clues and cues in situations, and use this information to create a positive outcome.

Salespeople who score low do not emphasize the importance of insight in their sales work. Their sales situations may be much more straightforward and may not require interpreting interpersonal nuances. They may depend upon structured, analytical approaches rather than attempting to read people and situations.

LOWER SCORES:

Potential Assets

- May take things at face value
- May be more straightforward, direct
- May spend more time gathering information and building knowledge

Potential Liabilities

- May not understand customers' motivations and underlying needs; may solve the wrong problem
- May be taken advantage of
- May have difficulty adapting to changing situations
- May miss changes in customers' moods and important subtleties

HIGHER SCORES:

Potential Assets

- Effective reader of non-verbal cues
- Able to change approach easily
- Able to gauge appropriate timing
- Quickly recognizes new opportunities

Potential Liabilities

- May react too quickly
- May misread people or situations
- May miss long-term implications
- May neglect structure and detail

How important is this behavior in your current sales role?

High

Medium

Low

Comments:

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IMPLEMENTATION

Implementing a sales solution may require a quick transaction or a more lengthy engagement. Whether short term or long term, relationships develop between salespeople and customers as well as between salespeople and other members of the sales team. This team may be internal or external to the salesperson's organization. In most cases, sales achievements and customer solutions occur as a result of both individual and shared efforts.

Often, sales situations require being sensitive to customer problems, feelings and concerns. Showing empathy may be a key factor in developing and maintaining a positive sales relationship.

There are also times during the sales process when some degree of forcefulness may be needed in order to negotiate, remain competitive and create a profitable business solution for both parties.

Implementing a successful sales process involves a balance of "people and task" activities. Being practical, action-oriented and goal-driven can truly advance a sale. But sales is also a profession where rejection and resistance require persistence and perseverance.

Sales is not an easy profession. Salespeople who set high standards and are willing to push themselves to meet these standards often find that sheer hard work will take them a long way toward achieving success.

The six Sales Practices associated with Implementation are:

AGGRESSIVENESS

TACTICAL

EMPATHY

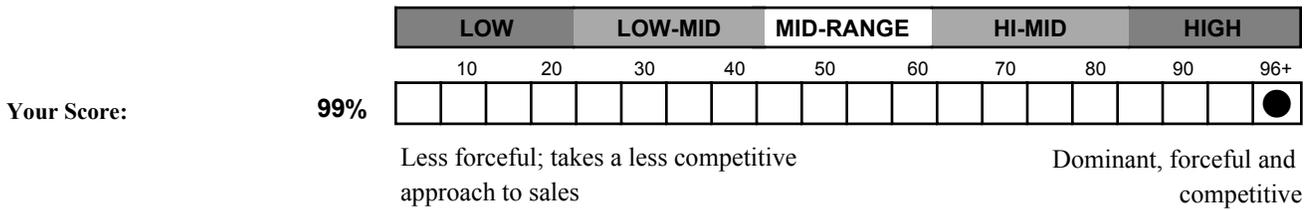
TEAM PLAYER

PERSISTENCE

PRODUCTION

Aggressiveness

Engaging with others in a forceful and competitive manner.



High scores are indicative of individuals who interact with others in a forceful, competitive manner. This may be displayed as assertiveness in moving the customer to make a decision, classic high-pressure sales, or vigorously contesting the competition. These salespeople push to close the sale - they are not afraid to ask for an order. They enjoy high-intensity engagement, and are likely to do well with equally forceful customers.

Salespeople who score low on Aggressiveness are more likely to see sales as a vehicle for accommodating the customer in a "win/win" situation. Instead of forceful confrontation, they may try more subtle measures to make the sale.

LOWER SCORES:

Potential Assets

- Does not alienate customers
- Can be patient
- May be sensitive to customer needs
- May be easygoing

Potential Liabilities

- May have difficulty asking for orders
- May be vulnerable to rejection
- May not be tough enough
- May concede too easily

HIGHER SCORES:

Potential Assets

- Strong presence
- Can be a good negotiator
- Good in highly competitive markets
- Not afraid to push for the sale

Potential Liabilities

- May come across as too serious or intense
- Customers may feel intimidated
- May be seen as high-pressure
- May be viewed as insisting on own way

How important is this behavior in your current sales role?

High

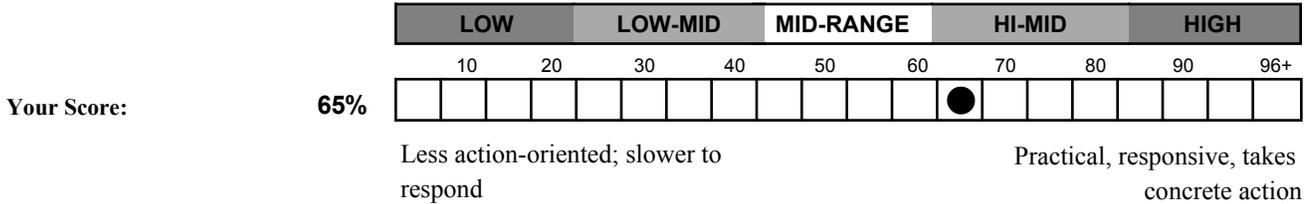
Medium

Low

Comments:

Tactical

Having a very practical and concrete orientation towards the selling process that emphasizes being responsive and action-oriented.



Salespeople who score high on this sales practice approach selling in a very concrete and practical fashion. Tactical people are doers who will often show a good deal of flexibility. If one thing does not work, they will try something else. They will respond quickly to a request or situation with a simple, sensible course of action. They tend to prefer expedient and practical solutions.

Salespeople who score low may approach selling from a more analytic and strategic orientation. They may prefer to think before they act, and may emphasize finding solutions they believe to be more comprehensive, even if these take longer to identify and implement. They may feel less comfortable in a fast-paced, action-oriented environment.

LOWER SCORES:

Potential Assets

- May get positioned for the long term
- May do well with complex sales processes
- May be able to think as well as do
- May give well-prepared presentations

Potential Liabilities

- May have difficulty dealing with a customer's impatience
- May lack flexibility
- May move too slowly - May miss opportunities
- May provide overly complicated solutions

HIGHER SCORES:

Potential Assets

- Creates practical solutions
- Can change direction quickly
- May have good business instincts
- Enjoys being involved in the action

Potential Liabilities

- May act before thinking
- May have a short-term sales focus
- May sacrifice long-term goals for short-term gains
- May over-simplify complex problems

How important is this behavior in your current sales role?

High

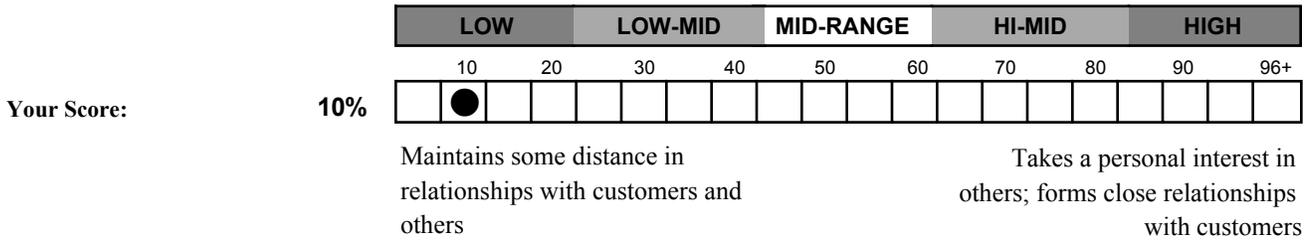
Medium

Low

Comments:

Empathy

Showing genuine interest in other people, being sensitive to others' feelings, and building close relationships with customers.



Individuals who score high on Empathy have a natural concern for people and their well-being. They transfer this to their relationships with customers. They try to understand their customers' problems, and want to find solutions that will help them. They may be less inclined to view selling as a technical exercise. They may also see the sales field as an opportunity for helping others.

Individuals who score low are unlikely to project strong feelings of empathy. They may be more business-like in the way they approach the sales process, or they may be friendly without forming strong personal bonds with customers and colleagues. They may establish firmer boundaries in their relationships with others.

LOWER SCORES:

Potential Assets

- May be tough-minded
- May be able to change direction quickly
- Objective in relationships
- Pays attention to factors other than interpersonal

Potential Liabilities

- May be viewed as self-serving
- May build less customer loyalty
- May cause customers to feel they are being maneuvered
- May show less interest in customers as people
- May be seen as less cooperative or helpful

HIGHER SCORES:

Potential Assets

- Concerned about people
- May convert empathy to sales
- Makes a positive impact
- Good listener
- Establishes long-term relationships
- Goes out of his/her way for others

Potential Liabilities

- May be vulnerable - Can be taken advantage of
- May lack business instincts
- May forget that the job is to sell
- May not be assertive enough with customers

How important is this behavior in your current sales role?

High

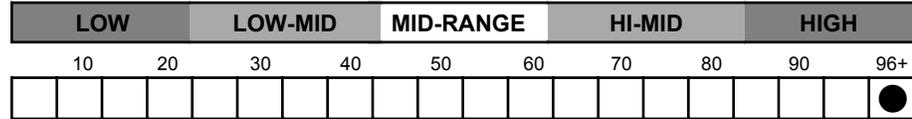
Medium

Low

Comments:

Team Player

Being loyal to the organization and attending to its needs; aligned with the team.



Your Score:

99%

Less interest in team membership;
less aligned with organization

Loyal team member; attentive to
the organization's expectations

Salespeople who score high on Team Player like being a member of an organization and a team. They believe in their organization and its mission, and want to feel that they are contributing to its success. These individuals tend to stay pretty close to company ideas and suggestions; they will adhere to company policy.

Salespeople who score low may see themselves as much more independent. They prefer to use their instincts, without necessarily following company sales plans and policies. They may view the need to align with a team and/or organization as hindering rather than helping their sales success.

LOWER SCORES:

Potential Assets

- May be independent, forceful
- Tends to supply his/her own drive
- May show a strong professional orientation
- May show initiative
- May need little guidance or support from the company

Potential Liabilities

- May engage in unproductive conflict
- May reinvent the wheel
- May be seen as self-serving
- May not see the big picture
- May have problems with the company/team

HIGHER SCORES:

Potential Assets

- A good team player
- Less likely to over-promise
- Sells what the company can support
- Doesn't reinvent the wheel
- Likely to represent the company well

Potential Liabilities

- May lack independent initiative
- Can be taken advantage of
- May miss opportunities
- May be too dependent upon the company's reputation
- May not challenge the organization/team to improve

How important is this behavior in your current sales role?

High

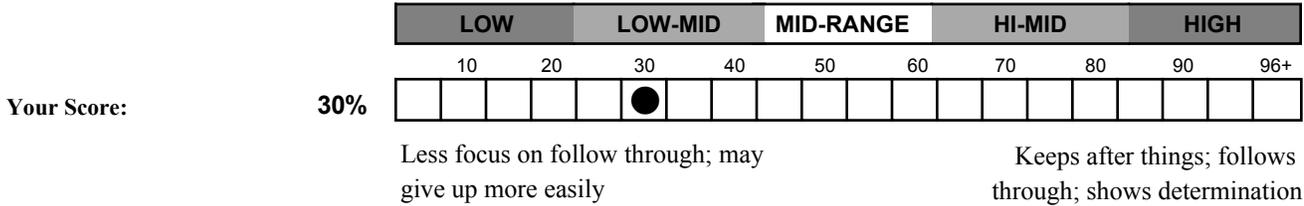
Medium

Low

Comments:

Persistence

Taking an approach to sales that emphasizes perseverance and determination in order to achieve success.



Individuals who score high on Persistence emphasize the importance of determination and perseverance. They believe that if they just keep trying, eventually the sales will come. They may keep a vision of what success looks like in front of them so that if things do not go well, they are still able to carry on. They do not get too upset if their ego gets bruised a bit on occasion - they accept that as part of the job. They are inclined to show great discipline and follow-up, even in situations that are not initially promising.

Individuals who score low are more likely to emphasize elements other than perseverance. They may try for the quick maneuver, or feel that there are too many opportunities to spend a lot of time on those that are not immediately successful. They may emphasize the importance of strategy, calling only on those customers most likely to buy rather than thoroughly covering the market.

LOWER SCORES:

Potential Assets

- May be flexible
- May show creative initiative
- May be able to see the big picture
- Likely to avoid unproductive activities
- May be more insightful about a prospect's potential

Potential Liabilities

- May give up too easily
- May be too idealistic
- May start strong but lose momentum
- May show less follow-through on customer requests

HIGHER SCORES:

Potential Assets

- Not easily discouraged
- Can sell through sheer determination
- May be systematic, organized
- Will follow through on customer requests
- Needs little external motivation for self-discipline

Potential Liabilities

- May be unimaginative
- May be too tied to structure
- May lose sight of the big picture
- May neglect basic interpersonal skills
- May not know when to let go of an unproductive situation

How important is this behavior in your current sales role?

High

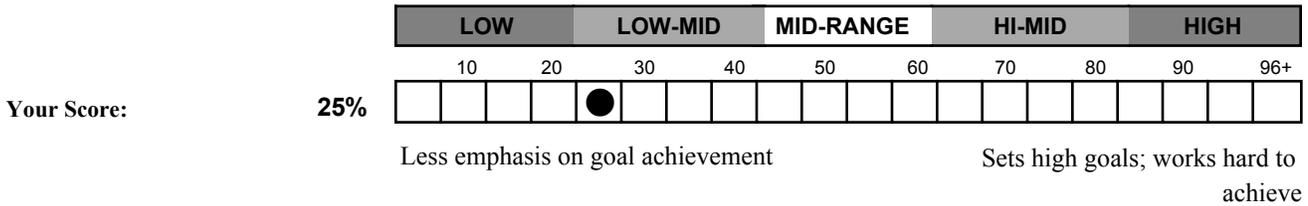
Medium

Low

Comments:

Production

Taking an approach to sales that emphasizes setting very high standards for achievement; having a strong results orientation.



Salespeople who score high on Production emphasize the importance of ambitious goals and setting high standards for themselves. They see themselves as results oriented, and may view the sales field as a testing ground for their abilities. They are very serious about high achievement and push themselves to get ahead. They feel that it is important to focus their energy on performing at a high level. They are ambitious and have a goal-oriented definition of success.

Salespeople who score low spend less energy on constantly trying to achieve more. They may emphasize the accuracy of their insights, their ability to impress customers with the depth of their product knowledge, or the amount of information they communicate. They may set limits in defining the goals and results that are meaningful to them.

LOWER SCORES:

Potential Assets

- May be willing to nurture prospects for a longer period of time
- May be spontaneous
- May project positive feelings
- May be quick on his/her feet - Flexible
- May have high standards for quality

Potential Liabilities

- May not realize full potential
- May fail to meet goals
- May not be willing to prepare adequately
- May be too dependent upon interpersonal skills

HIGHER SCORES:

Potential Assets

- Hardworking
- Sets high standards
- Constantly pushes to achieve
- Has a strong desire to succeed

Potential Liabilities

- May be overly serious
- May not pay attention to other aspects of the sales process
- May miss opportunities to build relationships
- May generate little positive excitement
- May become exhausted, burned out

How important is this behavior in your current sales role?

High

Medium

Low

Comments:

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DRIVERS

Sales can be a uniquely satisfying role. The salesperson is often on the leading edge of change: nothing happens unless something is sold. The rewards are there as well. These rewards come in many forms, from pride in being a sales professional, to delight in making lots of money, to great satisfaction from closing a particularly difficult account.

In sales, there can be tremendous rewards, but also tremendous competitive pressures. The long-term management of these pressures is extremely important for a salesperson's emotional well-being. Thus it becomes acutely important for the professional salesperson to be able to use the rewards of sales to build a positive defense against the inevitable disappointments.

What each of us considers a reward is shaped by the pattern of our underlying motivations . Some motivations appeal to us strongly, others to a moderate degree, and others do not move us at all. Our strongest motivations are likely to be especially significant and meaningful to us, and may well act as driving forces in our career and larger life.

These strong drivers may be used as vehicles for increasing our success and satisfaction in our field. We may design an approach to the job that will enlist these drivers and use them to our advantage. We may also de-emphasize certain aspects of the job which are inconsistent with our strongest drivers.

Of course, there will always be certain aspects of reality that modify and limit our actions to some extent. It is vital, however, that we not focus solely on these potentially limiting realities. We are more in charge of our own destiny than we sometimes realize.

The six Sales Practices associated with Drivers are:

SALES FOCUS

MANAGEMENT FOCUS

CUSTOMER FOCUS

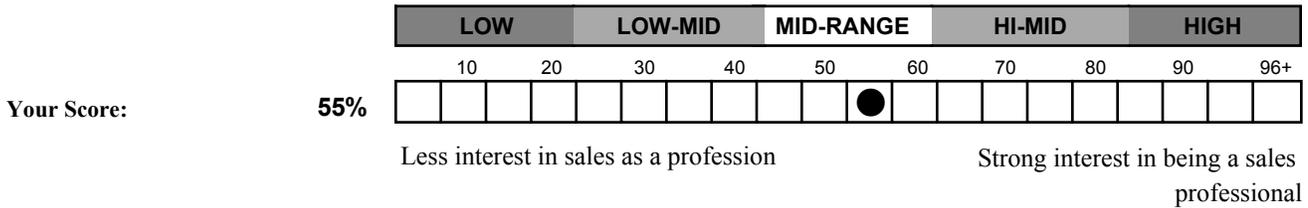
MATERIALISM

EGO REWARDS

IDEALISM

Sales Focus

Identifying with and taking pride in the sales role, and having a strong commitment to selling and the sales profession.



High scores on Sales Focus are associated with individuals who have a strong identification with the role of salesperson. They are proud of the sales field and believe in it. Often they do not mind being called a salesperson even if this is not their official title. They have a strong commitment to selling.

Low scores are associated with individuals who may be effective in sales but often see it as a stepping stone to something else (management, for example), or a necessary aspect of their true profession (consultant, technical specialist, etc.) They do not have a strong identification with selling as a career.

LOWER SCORES:

Potential Assets

- May feel comfortable in many roles
- May view sales more in terms of problem solving
- May get others to work for him/her

Potential Liabilities

- May not be well prepared to sell
- May not enjoy sales
- May see sales strictly as a step to another role

HIGHER SCORES:

Potential Assets

- Identified with the sales role - Confident in sales work
- Likely to enjoy all aspects of selling
- Willing to devote energy to selling
- Takes selling and sales role seriously

Potential Liabilities

- May be less motivated by non-sales aspects of the role
- May want to do everything him/herself
- May be seen as too narrowly focused on sales

How important is this behavior in your current sales role?

High

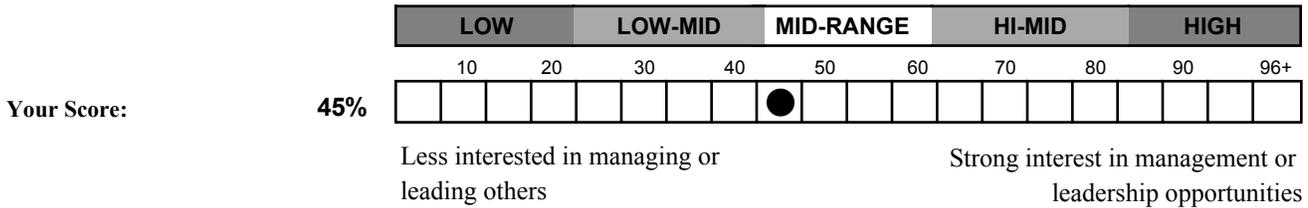
Medium

Low

Comments:

Management Focus

Emphasizing the management dimension of the sales role, organizing the efforts of others, and using leadership skills to get things done.



Individuals who score high on Management Focus emphasize the importance of the management dimension of the sales role. They believe in organizing the efforts of others as well as their own. They tend to depend upon their leadership skills to get things done - not only with customers, but also in relationship to other aspects of selling (for example, relationships with colleagues or suppliers). They may aspire to move into a managerial role, or may already be in a management or leadership role, or look upon selling as a means of getting into a leadership role.

Individuals who score low are not interested in managing or leading others. They emphasize other aspects of selling that can be accomplished without the need to supervise others. They may feel that they are professional salespeople first and foremost, and they will let the management possibilities fall to others or take care of themselves in other ways.

LOWER SCORES:

Potential Assets

- May enjoy focusing on selling
- May be seen as happy at his/her current level
- May have a strong technical orientation

Potential Liabilities

- May wait for others to make decisions, solve problems
- May not lead customers enough
- May be too dependent upon technical expertise
- May discount the importance of leadership in the sales process
- May be viewed solely as an individual contributor

HIGHER SCORES:

Potential Assets

- May be a good leader/manager
- May take a leadership role with customers
- May be a good mentor for newer salespeople
- May show a high degree of confidence
- May show a good deal of initiative

Potential Liabilities

- May prefer management to sales
- May expect product/service to sell itself
- May attempt to lead when should be following
- May come on too strong with colleagues

How important is this behavior in your current sales role?

High

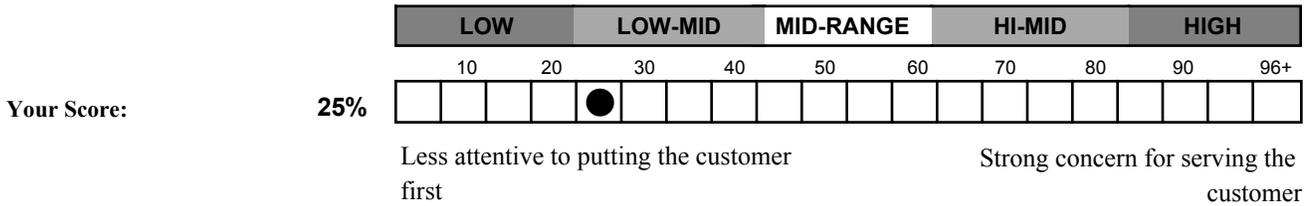
Medium

Low

Comments:

Customer Focus

Emphasizing the importance of putting the interests of customers first, and treating them well by providing both product quality and service.



Individuals who score high on Customer Focus believe very strongly in the importance of customer service. They will fight for their customers and make sure the customers' interests come first. They may also try to see what the customer's long-term needs will be and adapt themselves and their product line to those needs. There may be an idealistic quality to their feelings about the sales field. They are likely to feel that the key to success is making sure customers are happy.

Individuals who score low do not pay a great deal of attention to the dimensions associated with a strong concern for customer service. They set boundaries around what they are willing to do for a customer; or, they may be in a field which does not involve a great deal of customer service, or where customer service is taken care of by others.

LOWER SCORES:

Potential Assets

- Less vulnerable to rejection
- May be a good negotiator
- Deals well with customer resistance
- Likely to view him/herself as a salesperson, not a servicer
- May put the organization's needs first

Potential Liabilities

- May be seen as only out for him/herself
- May be insensitive to customer needs
- May build little customer loyalty
- May not listen to customers enough

HIGHER SCORES:

Potential Assets

- Builds customer loyalty
- Anticipates customer needs
- Not egocentric or demanding
- Will fight for customers
- May relay customer input back to the organization

Potential Liabilities

- May be unrealistic in appraising situations
- May be uncomfortable with conflict
- May teach rather than sell
- May be happier serving than selling
- May not take chances or push customers enough

How important is this behavior in your current sales role?

High

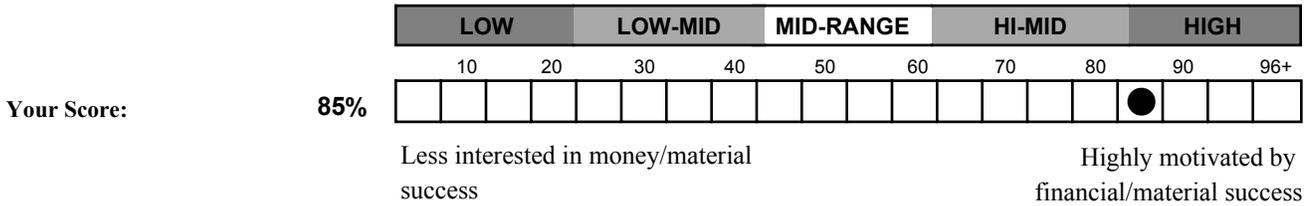
Medium

Low

Comments:

Materialism

Being strongly motivated to sell by financial and other material incentives.



Individuals who score high on Materialism tend to be motivated by financial gain. Part of the reason they are drawn to sales is the potential for significant financial compensation. They respond well to financial incentives. They tend to scorn low-paying but steady compensation schemes. They are likely to judge themselves and others by material wealth. They may enjoy working with high margin products or services which give the possibility for immediate gains, but which may involve some risk. Or, they may be drawn to working with larger accounts where the sales potential is greater.

Individuals who score low tend to be less motivated by financial gain and more inclined to see benefits in other types of rewards. There may be elements other than money which are equally if not more important to them. Success for them is not necessarily measured by the degree to which they can build their material wealth.

LOWER SCORES:

Potential Assets

- May be sincere, customer oriented
- May be more patient in closing a sale
- Looks for long-term gains
- May develop enthusiasm in certain customers
- May have an easygoing manner

Potential Liabilities

- Can be taken advantage of
- May miss opportunities
- May be reticent in asking for orders
- May not work hard enough

HIGHER SCORES:

Potential Assets

- May be good at finding opportunities to make money
- Often quick to close the sale
- May show a great deal of initiative
- Will be highly engaged if the compensation is good

Potential Liabilities

- May be viewed with distrust by some customers
- May be seen as self-serving
- May use high pressure tactics
- May be insensitive to customer needs
- May be manipulated by financial incentives

How important is this behavior in your current sales role?

High

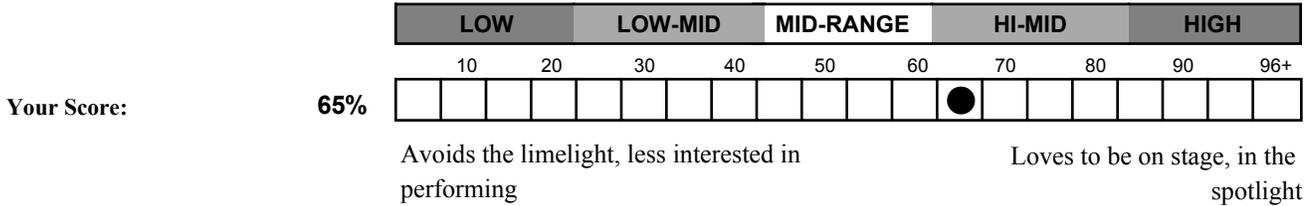
Medium

Low

Comments:

Ego Rewards

Viewing the sales role as providing the opportunity to gain status and recognition; seeking to be the center of attention.



Salespeople who score high on Ego Rewards love to be in the spotlight and on stage. Closing a sale represents an affirmation to them - an affirmation which lets them know they are doing well. They respond to opportunities which put them in a positive light and allow them to be the center of attention. They may be overly sensitive to criticism. They like to be with people who are successful, and they want to be regarded as successful. They can be very charismatic.

Salespeople who score low are much less concerned about attention and status, perhaps preferring to gain satisfaction from elements such as the technical nature of the job or the financial rewards. They are more likely to be somewhat reserved in their demeanor and in their relationships with people. They may feel less comfortable in situations where they are the center of attention.

LOWER SCORES:

Potential Assets

- May be low-key - Easygoing
- May plan presentations more carefully
- May develop customer loyalty
- May be a good listener
- May use technical expertise to gain respect

Potential Liabilities

- May feel less comfortable giving presentations
- May not seem confident enough
- May have difficulty forming initial contacts
- May be intimidated by powerful people

HIGHER SCORES:

Potential Assets

- Can project positive feelings
- Dynamic, confident presenter
- Shows great interpersonal initiative
- Holds people's attention

Potential Liabilities

- May alienate some customers
- May overwhelm more low-key colleagues
- May be viewed as self-centered
- May talk when should be listening
- May monopolize the center of attention

How important is this behavior in your current sales role?

High

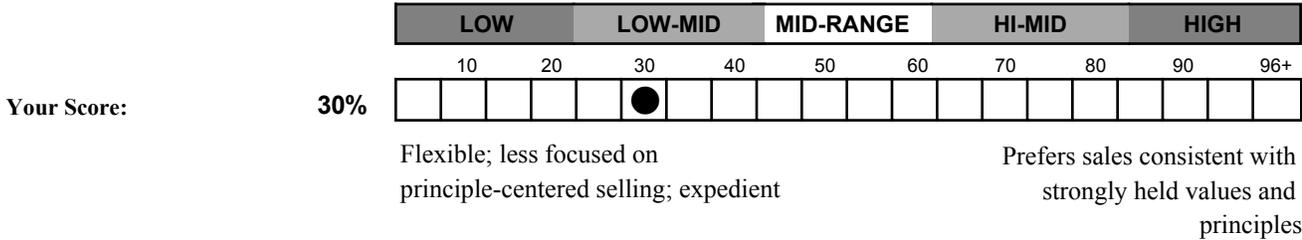
Medium

Low

Comments:

Idealism

Emphasizing the importance of the company's and one's personal integrity and principles, refusing to compromise these to make a sale.



Individuals who score high on Idealism tend to be quite concerned about selling in a manner that will not compromise their values. They will not sell for companies which lack a high measure of integrity, and they may look upon selling as a vehicle for realizing their values. They will tell customers the truth, even if it costs them a sale. If the products they sell do not do what they are supposed to do, they are likely to feel that they have been betrayed by their organization. They are unlikely to sacrifice long-term values for short-term gains.

Individuals who score low tend to be flexible in their approach to selling. They are more inclined to tell the truth attractively. They may also see themselves as being so identified with the professional sales role that they will sell almost anything. They are less likely to link their sales role to their personal principles.

LOWER SCORES:

Potential Assets

- Can often be flexible
- More open to selling a variety of products
- Likely to look at alternatives
- May be quite sophisticated about people

Potential Liabilities

- May be distrusted by some customers
- May be too expedient
- May lose sight of the overall goal
- May fail to take a stand on issues

HIGHER SCORES:

Potential Assets

- Can make a compelling link between products and principles
- Can be very sincere
- Builds trust with customers
- Conveys a strong belief in his/her products/services

Potential Liabilities

- May be viewed as unrealistic or too theoretical
- May be overly rigid
- May be unsophisticated about business

How important is this behavior in your current sales role?

High

Medium

Low

Comments:

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Exploring Your Feedback

You have now received feedback on each of the Sales Practices measured in the Sales Performance Assessment™. To obtain a more comprehensive view of your sales performance, you will want to explore how individual sales practices combine with others.

For example, a sales professional who scores high on both Technical and Production will approach selling as an ambitious expert. A sales professional who scores low on Technical but high on Production is likely to employ a sales approach that is less focused on product and service expertise and drives for results in other ways, such as the relationship aspects of selling.

As you can imagine, there are hundreds of combinations of the various sales practices that can provide additional insight into your approach to sales. The following pages highlight some of the more significant combinations in your profile. This information is derived from an analysis of high scores (70% or above) and low scores (35% or below) in your profile.

Your Perceptions

The following summary presents the major interpretive points suggested by your feedback data. As you read these statements, you may wish to check or highlight those you agree represent significant aspects of your sales approach, or those you would like to explore further and perhaps discuss with others who have observed your sales approach: your boss, your peers, or a coach. In your approach to your sales role, you describe yourself as:

Preparation

- Preferring to focus efforts on being part of a team and an organization rather than taking an innovative, independent approach to the sales role.
- Presenting in-depth product knowledge and expertise in a forceful and direct manner.
- Constantly looking for any occasion to add new customers to the base; willing to give a sales pitch at the slightest opportunity, and using emotional intensity to create excitement and enthusiasm for it.
- Energetic, enthusiastic, and comfortable working in a fast-moving environment, but also careful to pay attention to planning strategies and thinking through the implications.
- Making a lot of sales calls but less likely to qualify them; sometimes failing to recognize when a prospect is not really a good potential customer.

Contacting

- Projecting enthusiasm to customers without monitoring their reactions; capable of delivering upbeat sales messages, but unlikely to recognize quickly enough when these are not working with a particular person.
- Enthusiastic and assertive; likely to be forceful in interactions with others, but running the risk of being viewed as exerting high pressure and possibly as being almost overpowering.
- Direct and forceful in a sales interview; less attuned to the reactions of customers, possibly missing the subtle cues that would indicate when a less assertive approach should be used.
- Putting a lot of emotional intensity into communications; likely to draw favorable reactions from people by providing ample information in a dramatic fashion, but also likely to sometimes overwhelm others with information.
- Fully informing customers about what is going on, but not always recognizing when to stop talking; less attentive to signals from the audience which indicate that they have heard enough.

Your Perceptions (Continued)

Implementation

- Able to naturally energize a group; likely to build enthusiasm and get the team excited about the organization's objectives.
- Spending less energy on gathering insights into people, and more time on following company policy and team mandates, possibly missing subtle cues that could result in better integration into the team and/or the organization.
- Responding to the company's and team's needs in an assertive way; likely to be quite forceful and direct in the effort to do what the company wants.
- Assertive, competitive, and willing to push for a desired outcome; not particularly attuned to people's feelings, however, and likely to sometimes be perceived as insensitive to the needs of others.
- Competitive as well as communicative; likely to provide customers with a wealth of information, but running the risk of competing with them for air time, rather than listening to their needs and concerns.

Drivers

- Having a high level of energy and enthusiasm, but less likely to focus this energy on the customer service aspects of the sales role.
- Willing to be forceful in pushing a customer to accept a point of view; utilizing an approach to the sales process that favors aggressiveness more than service.
- Having a strong identification with the team and the organization that may sometimes overshadow the best interests of the customer; likely to keep the organization's needs and position firmly in mind when considering a customer's requests and concerns.
- Providing clear and up-to-date information, but placing less emphasis on advocating for the customer; more likely to communicate to customers what the company wants them to know than to communicate to the company what the customer wants or needs to receive.
- Emphasizing the importance providing in-depth information to others, without feeling a need to align ongoing communications with personal principles, values and beliefs.

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Establishing Priorities for Success

Having received and explored your feedback, you must now prioritize the practices which are most important for you to leverage, change or develop.

Tools for Establishing Priorities

This report contains several tools for establishing developmental priorities:

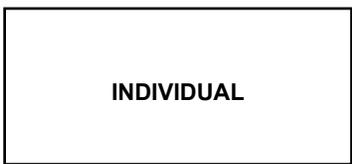
- 1. Your evaluation:** As you received your feedback on each of the sales practices, you identified and commented on the importance of each practice to your sales role.
- 2. The Four Filters:** This tool, presented on the following page, provides a method of viewing your feedback through four "filters" - Organization, Role, Situation and Individual.
- 3. Strategic Directions:** Management Research Group's Strategic Directions process determines which sales behaviors, from those measured in the questionnaire, are required to achieve the organization's strategic objectives. Using the Strategic Directions process, a group of leaders engage in a facilitated process to establish the most important sales behaviors, and then determine an ideal score range for each of these behaviors. If your organization completed this process, these ranges are shown in the profile on page 47.
- 4. Role Requirements:** Even if your organization did not engage in the Strategic Directions process, you can conduct a similar process based on your own understanding of what sales behaviors are most important for success in your sales role. Consider the evaluations you made earlier as you received your feedback on each of the sales practices. If the profile on page 47 is identified as Role Requirements, mark those behaviors you feel are required for success in your role.

As a sales professional, you know that success requires establishing priorities and developing focused action plans. Take the time to use the tools provided in this report to help you prioritize your efforts.

Establishing Priorities for Success in Your Role, Organization and Situation

One way to establish priorities is to think about your feedback passing through four filters: Organization, Role, Situation and Individual.

The Four Filters



Organizational purpose and strategy help shape and define a sales force. One organization may require sales professionals to use a technical approach, while other organizations require entrepreneurship in order to be successful. Given what you know about your organization's strategic directions and requirements, what sales practices will be your priority to develop, change or leverage?

Some sales practices will be more important than others depending upon the nature of the product or service you are selling, your industry, customers and competitors. Different sales roles will create the need to achieve different business outcomes under different circumstances and with different people.

Even sales professionals in the same role will face unique situations requiring the use of specific sales practices. For example, a sales person may be working with a new team or using new technology to support his or her sales efforts. Different selling contexts may require different sales behaviors in order to achieve success.

When establishing priorities, your individual perspective adds another dimension. For example, a particular sales behavior may have neither a positive nor a negative impact on achieving a successful outcome but exhibiting that behavior may make you feel more comfortable.

Use this priority-setting tool to help focus your efforts in preparation for creating a developmental action plan.

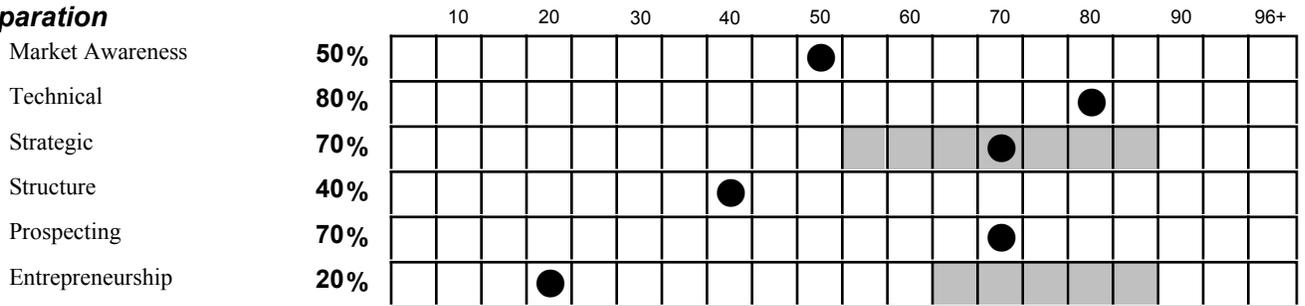
The following page presents either a Strategic Directions or a Role Requirements profile, described earlier in this section and intended to help you further establish priorities for your development and success.

Sales Performance Assessment

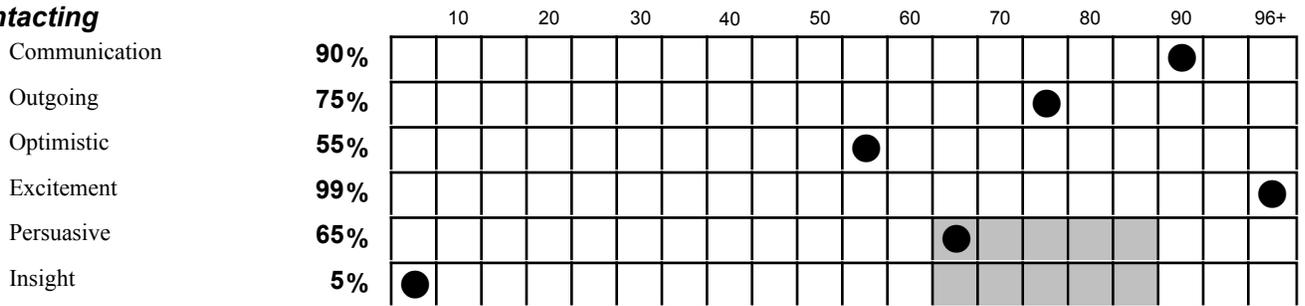
Strategic Directions Profile

LOW	LOW-MID	MID-RANGE	HI-MID	HIGH
-----	---------	-----------	--------	------

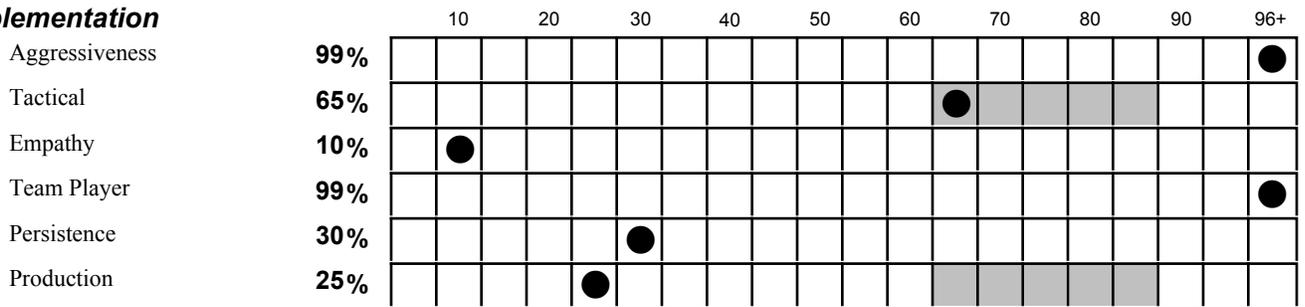
Preparation



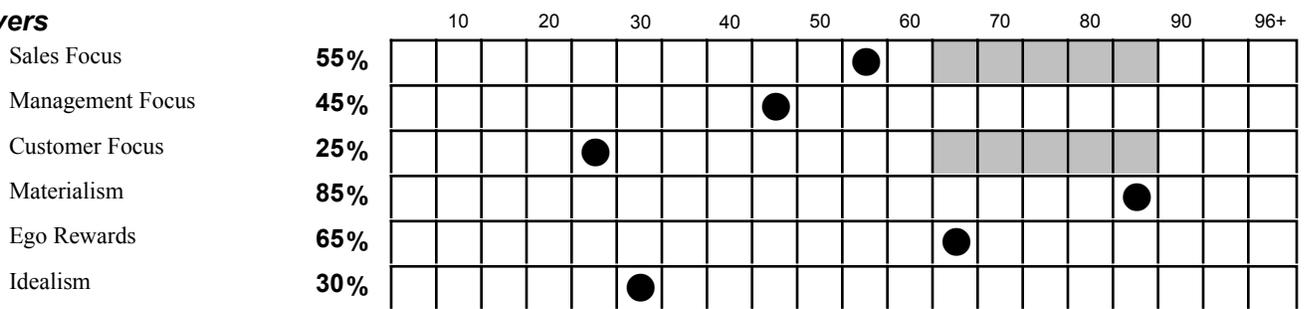
Contacting



Implementation



Drivers



The Bottom Line

You have now had the chance to receive and explore your feedback and establish priorities using the tools available in the Sales Performance Assessment™ process. As you reflect upon this information, you should now be able to answer the question: "What are my strengths?" "What opportunities do I have for development?" Being able to answer these questions will make your action plan goal-directed and aimed at making you even more effective and successful than you are today.

"What are my 3 greatest strengths?"

Strength	Example
1.	
2.	
3.	

"What are my 3 most important developmental opportunities?"

Your feedback is likely to contain some areas where you have developmental opportunities. List those below, and provide any examples you recall about how these have limited your success in your selling efforts. You may want to ask your coach or someone you know and trust to confirm this for you.

Developmental Opportunity	Example
1.	
2.	
3.	

Taking Action on Your Goals

Goal-directed action planning is the hallmark of sales success. This section will assist you in creating a personal development plan you can use to attain your goals.

You have now determined which sales practices are most important for you to develop. Your time is valuable, so allocate it carefully. You are likely to accomplish more by concentrating on one or two of the most significant developmental opportunities rather than working on too many issues at once.

Choose TWO or THREE sales practices that you feel are the most important for you to address. In making your choices, refer to your Bottom Line worksheet on page 48, as well as the work you did in Establishing Priorities for Success.

Tools for Action Planning

1. **S.M.A.R.T. guidelines:** In order to be effective, an action plan must be:
 - S Specific
 - M Measurable
 - A Action oriented
 - R Realistic
 - T Time-bound
2. **Action Planning Tips:** The following page lists some helpful tips for creating dynamic and achievable action plans.
3. **Action Planning Guides:** This section includes worksheets for creating specific goal-oriented action plans associated with each of your developmental opportunities.

Tips for Action Planning

The following tips will help you create executable action plans. Add any tips you think are important for you to remember.

- Remember the S.M.A.R.T. guidelines.
- When developing your action plan, it is usually easier to work on acquiring and developing behaviors than on decreasing the use of behaviors that are "too high." When possible, choose to develop behaviors that will increase your success and minimize any liabilities.
- Choose goals that are truly meaningful to you. State the goal in terms that are specific and positive.
- Assess potential obstacles by thinking of the internal and external barriers that you may need to overcome in order to reach your goal. **Internal barriers** are obstacles that exist within you (i.e. lack of confidence, time allocation problems). **External barriers** are obstacles that exist in the world around you (i.e. limited resources, market conditions). Once you have identified these obstacles, think of methods for dealing with and overcoming each one.
- Identify resources that are available to you or that you need to obtain. Consider resources inside or outside your organization. Sample resources include training, co-workers, books, or your own knowledge, skills and experiences.
- Assign completion dates to each action step. Make them incremental and achievable.
- Choose action steps that are dramatic and fun. The more positive feelings you can gain along the way, the more likely the action step is to be helpful.
- Make sure that your action steps are realistic, and weigh the importance of reaching a goal with the time you have available to achieve it. A good guideline for any professional is to allocate to development 5% to 10% of the time you spend in your job activities.
- Evaluate how your strong drivers might be used to help you achieve your goal. These motivating forces will help you increase your feelings of fulfillment and satisfaction as you work toward the achievement of your goal.
- The proof of the quality of an action plan is in its results. If the plan is developmental, it implies change. To ensure that action and change lead to the desired results, set a date to evaluate your progress toward your stated goal.
- Choose a coach and link your action plans to your work activities. Remember, your goal is to increase your effectiveness in your sales role. A coach can provide the impetus for action planning and implementing your goals.
- **Other tips:**

Action Planning Guide #1

1. **Developmental Opportunity:** _____

2. Restate the Developmental Opportunity as a Developmental Goal. What are the objectives of this developmental activity? What specific changes are you looking to make?

3. What specific action steps will you undertake to achieve this goal?

Action Step:

Target Completion Date:

4. Are there major obstacles to overcome or additional resources needed in order to achieve this developmental goal?

5. How could your strong sales drivers be used to support your efforts to achieve this developmental goal?

Strategy:

Sales Drivers:

6. Date to review your progress toward this goal: _____

Action Planning Guide #2

1. **Developmental Opportunity:** _____

2. Restate the Developmental Opportunity as a Developmental Goal. What are the objectives of this developmental activity? What specific changes are you looking to make?

3. What specific action steps will you undertake to achieve this goal?

Action Step:

Target Completion Date:

4. Are there major obstacles to overcome or additional resources needed in order to achieve this developmental goal?

5. How could your strong sales drivers be used to support your efforts to achieve this developmental goal?

Strategy:

Sales Drivers:

6. Date to review your progress toward this goal: _____

Action Planning Guide #3

1. **Developmental Opportunity:** _____

2. Restate the Developmental Opportunity as a Developmental Goal. What are the objectives of this developmental activity? What specific changes are you looking to make?

3. What specific action steps will you undertake to achieve this goal?

Action Step:

Target Completion Date:

4. Are there major obstacles to overcome or additional resources needed in order to achieve this developmental goal?

5. How could your strong sales drivers be used to support your efforts to achieve this developmental goal?

Strategy:

Sales Drivers:

6. Date to review your progress toward this goal: _____