



Rainmaker - SFA Sales Performance Review tm

Examinee: - **JONATHAN HIGGS**

Company: - ABC Industries

Date: - December 17, 2011

SFA Sales Development Format

INSTRUCTIONS:

The information contained in this report is designed to assist in understanding and interpreting traits necessary for success in Sales. Read the header information atop each page. This section is designed for Management Review and interpretation and is designed to be used as part of the facilitation process. The development text section is designed to be shared with the examinee.

CONTENTS:

- ◆ **Success Factor Analysis** and Job Suitability Rating
- ◆ Management Recommendation - Action Plan

CONFIDENTIAL

SAMPLE REPORT



Success Factor Analysis

THIS PERFORMANCE DEVELOPMENT SALES REPORT IS PRINTED IN TWO PARTS

CONTENT

1. Confidential Executive Summary:

This summary is designed to show the behavioral match of the examinee as compared to successful salespeople in the same type of job. This portion of the report is not to be disseminated to the examinee as it contains a job suitability ranking based on your determination of the behavioral requirements of the job (as submitted to us on the Analyst-Link "Activator" form).

2. SALES TRAINING & DEVELOPMENT INSIGHTS:

This is the "Training" section of the Success Factor Analysis. It is designed to assist the sales manager and the employee in understanding the behavioral and motivational requirements of the job and to help identify areas where training effort should be focused. This section consists of a behavioral hierarchy analysis of strengths and weaknesses and the (c) Success Insights development text. It contains valuable insight into the "work-style" of the examinee to help them understand their approach to the job and their response to the work environment. The header atop each page contains information for use.

NOTE:

Pay close attention to the "Value to the Organization" and "Ideal Environment" pages as they are symbiotically linked.

For a person to achieve their optimum value to the organization their ideal work environment needs must be fulfilled. The more closely the organization can provide the "Ideal work environment" the more "Value to the organization" attributes will be realized. Understanding the link between these two pages is critical to developing the examinee.

Understanding the SFA

Page 1: The Success Factor Analysis

Shows the SFA rating and ranking of the examinee compared to successful people in the same type of job numerically and graphically.

Page 2: Manager's Report

Shows behavioral and motivational strength and includes analyst comments along with Natural and adapted work-style profile.

*For an in-depth explanation of work-styles go to www.analyst-link.net
Click on "Administrator" Scroll down to The Value of Intelligence
Click on the "Understanding work styles" link.*



SUCCESS FACTOR ANALYSIS

RANK as *Sales Associate*

Examinee: **Jonathan Higgs**

Overall Job Suitability: 39% Poor

Selling Skill Rating: 50.33% - Merged into total rating.

***Temporary morale drop**

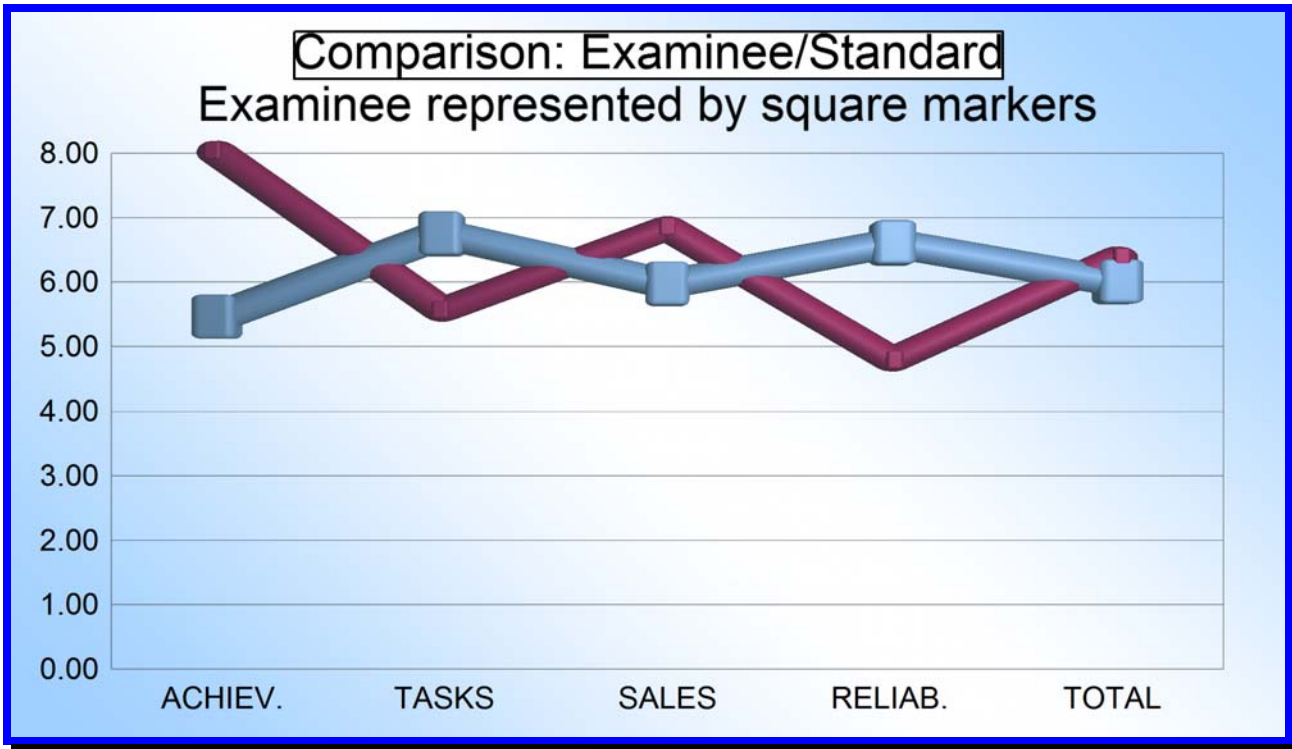
Post-Hire Standard

Achievement Factors:	7.98
Task/Detail Factors:	5.56
Merged Selling Factors:	6.82
Reliability Factors:	4.79
COMPENSATING FACTORS:	6.36

Examinee/Comparison to Standard:

5.45 Marginal	-Lower
6.72 Good	-Higher
5.96 Marginal	-Lower
6.58 Good	-Higher
5.99 Marginal	-Lower

Ability to work on commission: 6.04 Acceptable



NOTES: _____ Company: **ABC Industries**

Sales Manager's Report

ABC Industries

Jonathan Higgs

39% Poor
Sales Associate

STATUS: L/T Employee

- Employed 1 year or more.

BEHAVIORAL RANKINGS		Match to "Standard"	
Sales Factors:	6.57 Good	-----	Lower
Achievement Factors:	5.45 Marginal	-----	Lower
Task/Detail Factors:	6.72 Good	-----	Higher
Reliability Factors:	6.58 Good	-----	Higher
Compensating Factors:	5.99 Marginal		
Behavioral Inventory:	6.43		
Advancement Potential: -			
Ability work on Commission: Acceptable			
Selling Skill Rating: 50.33%			

CURRENT FOCUS

BEHAVIORAL TRAITS	Standard	Examinee	TRAINING REQUIREMENTS
>> Merged Sales Traits-	6.82	5.96	- Overall training recommended.
Achievement Traits-	7.98	5.45	- MISMATCH TO JOB REQUIREMENTS.
Task Propensities-	5.56	6.72	- None
Consistency/Reliability-	4.79	6.58	- None

- NOTE: A grade equal to the standard is recommended for "Key" items marked > or >>.

ANALYST COMMENTS:

- Current sales orientation matches those who are focusing on client relations and servicing.
- Achievement traits are in decline. Probe Cause.
- Jonathan is best suited to a customer service position.

- Examinee's Natural work-style = "Supporting Relater " adapting toward "Supporting Relater "

* NOTE: To be productive the examinee may require additional development & supervision.

- All ratings based on a scale of 1 to 10. 5.00 is a passing albeit marginal grade.

Education years: 14

Rank: 3=Poor, 4=Below Average, 5=Marginal, 6=Acceptable, 6.50=Good 7=Above Average, 8=Excellent, 9=Superior
> = Key job parameter traits. >> = Most important job trait as selected by the test administrator.

Number of jobs in 10 years: 2 Work Years: 10 Supervision: Minimum 12/17

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NOTES:



Success Factor Analysis

Understanding the SFA *(Continued)*

Page 3: Detailed Development Guide

This page shows comparison of candidate traits to the standard (successful people in the same type of job) and indicates areas in need of improvement ranging from minor issues to those requiring Professional Assistance.

For best effectiveness focus on developing no more than three issues at a time.

Page 4: Natural/Adapted Behavioral Focus

This page indicates any stress issues and shows the examinee's current focus.

Review to determine if their focus is positive.

Development Information:

Reducing Turnover - Orientation training

Creating a "Communications Link" with their manager is the key to developing a positive attitude about the job and the company.

To assist in this effort, an orientation workbook called the "Success Discovery Process" (SDP) was created. The SDP is customized for this assessment. Print a copy for the examinee and ask they fill it out completely. Afterwards facilitate the SDP with them. Keep in mind that they will usually disagree with any negative statement so listen carefully as to why they disagree. The goal here is to create a "Communications Link" so the employee views you as a coach and a mentor, not a disciplinarian. Remember, you as a manager and coach are the key to reducing turnover!



DETAILED DEVELOPMENT GUIDE

Prepared for: **Jonathan Higgs**
As: **Sales Associate**

-INSTRUCTIONS:

Carefully review the training and development recommendations listed on this page. Discuss them with your Sales Manager or Facilitator. Keep in mind they refer to "Behavioral and Motivational" traits, not skills. Items marked with > are considered to be important to the job. Item marked >> is of key importance.

Traits & Propensities	CURRENT FOCUS		TRAINING RECOMMENDATIONS	Stress Levels
ABC Industries	Standard	Examined	- Selling Skill Rating: 50.33%	
SELLING PROPENSITIES:				
> Closing	9.30	6.42	* PROFESSIONAL TRAINING REQUIRED.	-
> Handling Objections	8.71	6.25	- SUBSTANTIAL training required.	-
Empathy/Listening Skills	5.00	6.83		Low
Preparation/Thoroughness	5.00	6.83		Low
Presentations/Communication	8.71	6.58	- SUBSTANTIAL training required.	-
Prospecting/rejection	8.38	5.58	* PROFESSIONAL TRAINING REQUIRED.	-
> Follow-up/Thoroughness	5.17	6.92		-
Servicing after the sale	4.92	7.17		-
>> Sales Propensity Averages->	6.90	6.57		
ACHIEVEMENT PROPENSITIES:				
> Challenge/Competitiveness	7.79	5.33	- SUBSTANTIAL training required.	-
Persuasiveness	8.75	6.17	* PROFESSIONAL TRAINING REQUIRED.	-
Results/Goal Orientation	7.25	4.83	- SUBSTANTIAL training required.	-
Self Confidence	7.63	5.25	- SUBSTANTIAL training required.	-
> Motivation/Self Directed	8.46	5.67	* PROFESSIONAL TRAINING REQUIRED.	-
Achievement Averages->	7.98	5.45		
TASK PROPENSITIES:				
Client Relations/Sociable	6.46	6.42		-
Information/Fact Gathering	5.83	6.92		-
Paper Work/Reports	4.38	6.83		Low
Task Propensity Average	5.56	6.72		
CONSISTENCY/RELIABILITY	4.79	6.58		Low

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NOTES: _____

Natural/Adapted Behavioral Focus - Sales

Understanding Change:

The ratings listed here compare the "Natural" or "Basic" traits you bring to the job against the "Adapted" or "Response" traits upon which you are focusing in response to the perceived requirements of the job. These are considered to be "Raw" or transitional scores that are uninterpreted to your current focus. The interpreted scores may be found within the "Development Guide." They are adjusted to allow for your current phase which is weighted toward Pre-hire, Current Job Suitability, and/or Job development.

If the difference between Natural and Adapted behavior is greater than 1.50, it indicates a change in focus that is somewhat outside your normal range and may, even if the focus is positive, cause stress. The greater the difference the more intense the stress may become. Minor differences (1.00 or less) are often normal adaptation to your concept of the needs of the job. Major differences, (More than 2.00) indicate behavioral masking and are the primary cause of stress which in turn causes fragmented performance and job dissatisfaction. Intelligent people constantly adapt to their work environment (Transitional phasing) where even stress can be a positive force. Stress will dissipate when your current phase transition is complete.

[Review this page with your manager or facilitator to determine if your current focus should be redirected.](#)

	Natural or "Basic"	Adapted or "Response" [Trait intensity]	Stress
> Closing	7.25	6.00 <----- Declining	-
> Handling Objections	7.25	5.75 <----- Declining	-
Empathy/Listening Skills	6.00	7.25 -----> Increased Focus	Low
Preparation/Thoroughness	6.00	7.25 -----> Increased Focus	Low
Presentations/Communication	7.25	6.25 <----- Declining	-
Prospecting/rejection	6.25	5.25 <----- Declining	-
> Follow-up/Thoroughness	6.25	7.25 -----> Increased Focus	-
Servicing after the sale	6.50	7.50 -----> Increased Focus	-
>> Sales Averages->	6.59	6.56 <----- Declining Overall Sales Focus	
> Challenge/Competitiveness:	6.00	5.00 <----- Declining	-
Persuasiveness	7.00	5.75 <----- Declining	-
Results/Goal Orientation	5.50	4.50 <----- Declining	-
Self Confidence	5.75	5.00 <----- Declining	-
> Motivation/Self Directed	6.50	5.25 <----- Declining	-
Achievement Averages->	6.15	5.10 <----- Declining Achievement Focus	
Client Relations/Sociable	6.75	6.25 <----- Declining	-
Information/Fact Gathering	6.25	7.25 -----> Increased Focus	-
Paper Work/Reports	6.00	7.25 -----> Increased Focus	Low
Task Averages->	6.33	6.92 -----> Increased Overall Task Focus	
CONSISTENCY/RELIABILITY	5.75	7.00 -----> Increased Reliability Focus	Low

NOTES: _____

FACILITATION GUIDELINES & TECHNIQUES

Being an effective coach is the primary duty of any Manager or Supervisor. The coaching process is all about building a "Communications Link" between management and employee.

Instructions:

1. Provide a copy of the Employee portion of the text report to the employee. The Coach portion includes a job suitability rating. This portion of the report is Confidential and should not be shared with the employee.
2. Provide the appropriate Success Discovery Process (SDP) workbook
3. Ask the employee underline or highlight any statement in their copy of the report they strongly disagree with. Ask they fill out the "Success Discovery Process" Workbook and complete an Action Plan for improvement" focusing on the three most important areas to be improved. These items must be completed before the facilitation discussion.
4. Create a discussion agenda by underlining any statement on the review that, in your opinion is true, but impacts negatively on the employees' performance. Use this information along with notes from the employees' personnel file and job description to fill out your version of the "Action Plan" to be used as your discussion agenda. Also highlight positive statements that are true, use these to deliver praise to the employee. Balance development comments with praise commentary.
5. Create an unhurried setting, allow at least one hour for the facilitation process; serve a beverage, keep it casual. Remember your goal is to establish a dialog and assist the employee in creating their own development program. Allow the employee to do more than half of the talking. Ask their opinion of the Review; ask them to discuss any statement in the report with which they strongly disagree. Ask open ended questions. Ask for suggestions. Listen! Ask if you can take notes.
6. Your goal is to obtain improved performance through interactive dialog. It cannot be achieved if the employee has set up defensive barriers. Use positive comments to maintain interest. As they discuss statements from the report in dispute, it is acceptable to add your comments. Remember to agree or disagree with the REPORT not the employee. Do not be general, give specific examples. Stick to facts.
If the employee disagrees with a statement in the report and you concur say "In this instance I disagree with the report." If the employee disagrees with a statement in the report and it is true, say "In this instance I agree with the report and let me give you an example."
7. Don't allow complaints about the company, other employees, or other departments to mask the real purpose of this discussion; which is, to improve the performance of the employee being reviewed. Salary, benefits, and money issues are not and should never be part of the performance review and facilitation process. Compensation levels should increase only when the employee increases their value to the organization.
8. Combine your "Action Plan for Improvement" with theirs. Decide on mutually agreed improvement goals and write up a new "Action Plan" focusing on no more than 3 areas for improvement. Get input from the employee as to the best way to accomplish goals, and the time-frames involved.
9. Continue the momentum. Review the performance goals, weekly if necessary, to make certain focus is being maintained. When the first three areas for improvement are corrected; create a new action plan to address other issues. Focus and follow-up!

Sales Action Plan Recommendations

NAME: _____

List three areas in which the examinee must focus effort. Select improvement items from the Development Guide , the text report, or the job description.

• **FIRST FOCUS AREA:** _____

Action Plan - Steps I will use to achieve improvement goals in this area:

Time frame to achieve this goal:

• **SECOND FOCUS AREA:** _____

Action Plan - Steps I will use to achieve improvement goals in this area:

Time frame to achieve this goal:

• **THIRD FOCUS AREA:** _____

Action Plan - Steps I will use to achieve improvement goals in this area:

Time frame to achieve this goal:

Date: / /

Action Plan Commitment Agreement by: _____ (Examinee)

Supported by: _____ (Manager/Facilitator)



Rainmaker - SFA Sales Performance Review tm

Salesperson Development Copy

Examinee: - **JONATHAN HIGGS**

Company: - ABC Industries

Date: - December 17, 2011

SFA Sales Development Format

> INSTRUCTIONS PART ONE:

The information contained in this report is designed to assist in understanding and interpreting traits necessary for success in Sales. Read the header information atop each page.

This contains information on multiple behavioral dimensions including:

- ◆ *Sales Characteristics*
- ◆ *Areas for Improvement*
- ◆ *Action Plan*

SAMPLE REPORT



Success Factor Analysis

*Understanding the Behavioral Hierarchy
An Analysis of strengths and weaknesses*

INFORMATION:

Behavioral research suggests that the most effective people are those who understand themselves, both their strengths and weaknesses, so they can develop strategies to meet the demands of their environment. A person's behavior is a necessary and integral part of who they are. In other words, much of our behavior comes from "nature" (inherent) and much comes from "nurture" (our upbringing). It is the universal language of "how we act," or our observable human behavior.

BEHAVIORAL HIERARCHY:

The Examinee's key traits are shown on this page starting with their greatest strengths and ending with traits that may require additional development.

- ◆ *Ratings of 9.0 to 10. Indicate Superior levels of competency*
- ◆ *Ratings of 7.0 to 8.5 are Above Average*
- ◆ *Ratings of 6.0 to 6.5 are Average*
- ◆ *Ratings of 5.5 to 5.75 are Marginal/Trainable*
- ◆ *Ratings of 5.0 to 5.5 are Marginal*
- ◆ *Ratings of 4.0 to 4.75 are considered to be Below Average*
- ◆ *Ratings of 3.0 to 3.75 are Poor*
- ◆ *Ratings of less than 3.0 are areas of concern.*

To assist in the development process -

*Go to: **www.analyst-link.net***

*Click on the Navigation Link Labeled - **SDP workbook***

Select and Print out Guide (#18)

Complete the worksheets and create an Action Plan.



BEHAVIORAL HIERARCHY

The Behavioral Hierarchy graph will display a ranking of your natural behavioral style within a total of eight (8) areas commonly encountered in the workplace. It will help you understand in which of these areas you will naturally be most effective.

1. CUSTOMER ORIENTED



2. FREQUENT INTERACTION WITH OTHERS



3. FREQUENT CHANGE



4. COMPETITIVENESS



5. VERSATILITY



6. ANALYSIS OF DATA



7. URGENCY



8. ORGANIZED WORKPLACE



Understanding the Rainmaker Sales Development Program

INFORMATION:

Behavioral research suggests that the most effective salespeople are those who understand themselves, both their strengths and weaknesses, so they can develop strategies to meet the demands of their environment.

A person's behavior is a necessary and integral part of who they are. In other words, much of our behavior comes from "nature" (inherent) and much comes from "nurture" (our upbringing). It is the universal language of "how we act," or our observable human behavior.

SUCCESS DISCOVERY PROCESS:

After reviewing this report it is important that you read and fully complete the Rainmaker Success Discovery process for Sales. Understanding how to apply the information contained herein to your sales effort is a vital step to effect performance improvement..

To assist in this effort -

Go to: **www.analyst-link.net**

Click on the Navigation Link Labeled - **SDP workbook**

Select and Print out Guide (#18)

Complete the worksheets and create an Action Plan.

LINKED PERFORMANCE CATALYSTS

- **VALUE TO THE ORGANIZATION**
- **IDEAL (Work) ENVIRONMENT**

For a person to achieve their optimum value to the organization their ideal work environment needs must be fulfilled. The more closely the organization can provide the "Ideal work environment" the more "Value to the organization" attributes will be realized. The following two pages are closely linked. Please read them carefully.



This section of the report identifies the specific talents and behavior Jonathan brings to the job. By looking at these statements, one can identify his role in the organization. The organization can then develop a system to capitalize on his particular value and make him an integral part of the team.

- Big thinker.
- Works for a leader and a cause.
- Patient and empathetic.
- Dedicated to his own ideas.
- Self-reliant.
- Dependable and loyal team worker.
- Inner-directed rather than tradition-directed--brings fresh ideas for solving problems.
- People-oriented.
- Bottom line-oriented.



IDEAL ENVIRONMENT

This section identifies the ideal work environment based on Jonathan's basic style. People with limited flexibility will find themselves uncomfortable working in any job not described in this section. People with flexibility use intelligence to modify their behavior and can be comfortable in many environments. Use this section to identify specific duties and responsibilities that Jonathan enjoys and also those that create frustration.

- Freedom from restrictive rules.
- Forum for his ideas to be heard.
- Little conflict between people or customers.
- Work with a results-oriented team.
- An environment in which he may deal with people on a personal, intimate basis.
- A stable and predictable environment.



Behavioral research suggests that the most effective people are those who understand themselves, both their strengths and weaknesses, so they can develop strategies to meet the demands of their environment.

A person's behavior is a necessary and integral part of who they are. In other words, much of our behavior comes from "nature" (inherent), and much comes from "nurture" (our upbringing). It is the universal language of "how we act," or our observable human behavior.

In this report we are measuring four dimensions of normal behavior. They are:

- how you respond to problems and challenges.
- how you influence others to your point of view.
- how you respond to the pace of the environment.
- how you respond to rules and procedures set by others.

This report analyzes behavioral style; that is, a person's manner of doing things. Is the report 100% true? Yes, no and maybe. We are only measuring behavior. We only report statements from areas of behavior in which tendencies are shown. To improve accuracy, feel free to make notes or edit the report regarding any statement from the report that may or may not apply, but only after checking with friends or colleagues to see if they agree.

*"All people exhibit all four behavioral factors in varying degrees of intensity."
—W.M. Marston*



Based on Jonathan's responses, the report has selected general statements to provide a broad understanding of his sales style. This section highlights how he deals with preparation, presentation, handling objections, closing, and servicing. The statements identify the natural sales style he brings to the job. Eliminate or modify any statement that is not true based on sales training or experience.

Jonathan tends to build close relationships with his clients or customers. One of Jonathan's sales strengths is his ability to listen to what the buyer is saying. He can display the patience required to allow the buyer the opportunity to explain his needs. He prefers to sell in a territory where he knows the customers. This allows him to predict the sales environment and he can perform well under these circumstances. He likes to build close relationships with his customers and prefers making repeat calls, as opposed to cold calls. He resists making cold calls preferring to work in the more predictable environment of repeat calls. When Jonathan is under pressure, he can be tenacious and will not abandon his commitment to his clients or customers. He is nondemonstrative and wants his customers or clients to know that he is their "anchor of reality" in a "sea of confusion." He may have difficulty selling the aggressive buyer who just wants to hear the "bottom line" benefits. His natural sales style is slower paced than what the aggressive buyer wants.

Jonathan has, or wants, to develop a routine to his work so he doesn't omit important information. A routine provides him with confidence that he will cover all the benefits. Flexibility can be a problem with him. He prefers selling his way and may resist changing his presentation to meet the buyer's buying habits. He usually answers objections with facts and data. If he lacks this information, don't expect him to make up an answer. He may display frustration when confronted with objections he doesn't have the proper data to answer. He will avoid confrontation in his sales presentation. He may not even challenge a potential buyer who has been misinformed about his



SALES CHARACTERISTICS

product or service. He will remain amiable and attempt to influence by using logic. Jonathan's basic approach to dealing with objections is to cover every possible objection during the basic presentation.

Jonathan's sales presentations can be time-consuming and drawn out. This can be either a strength or a weakness. The longer, drawn out presentation works best when selling a complex or expensive product.

Jonathan may side with the customer, if the customer is dissatisfied with the product or service. His basic approach to servicing is to make the customer happy. He will postpone closing if unsure of a buyer's feelings. He has an inherent dislike for rejection and may postpone closing a sale, hoping the buyers will purchase of their own accord. He usually responds slowly to resistance when he is closing. He doesn't like confrontation, so he will avoid the resistance if possible. He loves to service what he sells. In fact, this represents one of his strengths. Jonathan tends to use the soft-sell approach to closing. He won't close hard, but will continue to call on the account until he gets the sale. Persistence may be his best closing method. He can become complacent with servicing the old accounts and not push hard enough for new business.



CHECKLIST FOR COMMUNICATING

Most people are aware of and sensitive to the ways with which they prefer to be communicated. Many people find this section to be extremely accurate and important for enhanced interpersonal communication. This page provides other people with a list of things to DO when communicating with Jonathan. Read each statement and identify the 3 or 4 statements which are most important to him. We recommend highlighting the most important "DO's" and provide a listing to those who communicate with Jonathan most frequently.

Do:

- Provide a friendly environment.
- Use a balanced, objective and emotional approach.
- Provide personal assurances, clear, specific solutions with maximum guarantees.
- Clarify any parameters in writing.
- Look for his oversights.
- Start, however briefly, with a personal comment. Break the ice.
- Present your case softly, nonthreateningly with a sincere tone of voice.
- Show sincere interest in him as a person; find areas of common involvement; be candid and open.
- Define the problem in writing.
- Appeal to how he will benefit or be admired.
- Provide solutions--not opinions.



DON'TS ON COMMUNICATING

This section of the report is a list of things NOT to do while communicating with Jonathan. Review each statement with Jonathan and identify those methods of communication that result in frustration or reduced performance. By sharing this information, both parties can negotiate a communication system that is mutually agreeable.

Don't:

- Patronize or demean him by using subtlety or incentive.
- Ramble.
- Be domineering or demanding; don't threaten with position power.
- Offer assurances and guarantees you can't fulfill.
- Keep deciding for him, or he'll lose initiative; don't leave him without backup support.
- Muffle or over legislate.
- Let him overpower you with verbiage.
- Force him to respond quickly to your objectives; don't say "Here's how I see it."
- Be abrupt and rapid.



A person's behavior and feelings may be quickly telegraphed to others. This section provides additional information on Jonathan's self-perception and how, under certain conditions, others may perceive his behavior. Understanding this section will empower Jonathan to project the image that will allow him to control the situation.

"See Yourself As Others See You"

SELF-PERCEPTION

Jonathan usually sees himself as being:

Considerate
Good-Natured
Team player

Thoughtful
Dependable
Good listener

OTHERS' PERCEPTION

Under moderate pressure, tension, stress or fatigue, others may see him as being:

Nondemonstrative
Unconcerned

Hesitant
Inflexible

And, under extreme pressure, stress or fatigue, others may see him as being:

Possessive
Detached

Stubborn
Insensitive



This section of the report was produced by analyzing Jonathan's wants. People are motivated by the things they want; thus, wants that are satisfied no longer motivate. Review each statement produced in this section with Jonathan and highlight those that are present "wants."

Jonathan wants:

- Recognition for loyalty and long service.
- A leader to follow and one who sets good examples.
- A sales plan he understands and accepts.
- Identification with fellow salespeople.
- A predictable work environment.
- To be persuaded by logic and emotion.
- People who understand his reasons for not wanting to argue.
- Methods for performing high quality work.
- Freedom from conflict and confrontation.
- Activities that don't infringe on family life.
- Sales environment with emphasis on peace and harmony.
- Constant appreciation, and a feeling of security on the team.
- Safety and security in the job.



In this section are some needs which must be met in order for Jonathan to perform at an optimum level. Some needs can be met by himself, while management must provide for others. It is difficult for a person to enter a motivational environment when that person's basic management needs have not been fulfilled. Review the list with Jonathan and identify 3 or 4 statements that are most important to him. This allows Jonathan to participate in forming his own personal management plan.

Jonathan needs:

- To relax and pace himself.
- A feeling of belonging--to know how important he is to the team.
- A tolerant sales manager.
- A program to encourage creativity and self-worth.
- Rewards in terms of tangible things, not just flattery and praise.
- A warm and friendly work environment.
- A manager who delegates in detail.
- Recognition that limits and rules do exist (and why).
- Capable associates with which to work.
- The facts in a logical sequence.
- To be introduced to new prospects.



NATURAL AND ADAPTED SELLING STYLE

Jonathan's natural selling style of dealing with problems, people, pace and procedures may not always fit the sales environment. This section is extremely important as it will identify if a salesperson's natural style or adapted style is correct for the current sales environment.

Natural	PROBLEMS - CHALLENGES	Adapted
<p>Jonathan is somewhat conservative in his approach to solving problems and usually doesn't push potential prospects to make quick high-risk decisions. He will accept challenges by being quite calculating in his response to the challenge. He will be quite cooperative by nature and attempt to avoid confrontation as he wants to be seen as a salesperson who is "easy" to work with.</p>	<p>Jonathan sees no need to seek out challenges or opportunities. He prefers to just sit back and react in a low-key manner. He tends to avoid confrontation with potential buyers.</p>	

Natural	PEOPLE - CONTACTS	Adapted
<p>Jonathan is sociable and optimistic. He is able to use an emotional appeal to convince others of a certain direction. He will trust others and likes a positive environment in which to sell.</p>	<p>Jonathan sees no need to change his approach to influencing others to his way of thinking. He sees his natural style to be what the environment is calling for.</p>	



Natural	PACE - CONSISTENCY	Adapted
<p>Jonathan's natural style prefers a sales environment that can take advantage of his relaxed demeanor, and patience is looked at as a requirement to win. He enjoys follow-up and follow-through. He resists selling new products until proven to his standards.</p>	<p>Jonathan feels that the sales environment doesn't require him to alter the way he deals with activity level and consistency.</p>	

Natural	PROCEDURES - CONSTRAINTS	Adapted
<p>Jonathan is independent by nature and his sales style displays his desire to sell the results he can deliver, as opposed to providing all the details to support his position. If he feels that rules and procedures are too restrictive he will attempt to change them in an active manner.</p>	<p>Jonathan sees the environment as requiring him to project an independent approach to the sales process. He will test new ideas to achieve sales results. He uses adaptability and flexibility in his attempt to satisfy customer needs.</p>	



Jonathan sees his present work environment requiring him to exhibit the behavior listed on this page. If the following statements DO NOT sound job related, explore the reasons why he is adapting this behavior.

- Exhibiting a willingness to work hard to complete the sale.
- Carefully avoiding conflict with customers or clients.
- Remaining cooperative in meeting the customer's needs.
- Using a calculated approach during presentations.
- Being a good listener.
- Persistence in completing a sale.
- Relying on traditional products or services.
- Building strong trust relationships with clients or customers.
- Cautious in potentially risky sales situations.
- Using humor as a way of coping with conflict.
- Using much data and sales aids for presentations.
- Presenting an agreeable demeanor to clients or customers.



In this area is a listing of possible limitations without regard to a specific job. Review with Jonathan and cross out those limitations that do not apply. Highlight 1 to 3 limitations that are hindering his performance and develop an action plan to eliminate or reduce this hindrance.

Jonathan has a tendency to:

- Be family-oriented--may resist overnight traveling.
- Confuse loyalty with performance, especially if his loyalty is rewarded.
- Not respond to objections with a projected confidence that meets buyer's expectations.
- Not be as forceful in closing as the situation may call for.
- Spend too much time in the office preparing for calls.
- Be slow to change--resists new ways of selling or prospecting.
- Spend too much time servicing and not selling.
- Give a false sense of compliance to superiors because he fights passively and you do not know he is in disagreement.



This section provides suggestions on methods which will improve Jonathan's communications when selling to different styles. The tips include a brief description of typical people in which he may interact. By adapting to the communication style desired by other people, Jonathan will become more effective in his communications with them. He may have to practice some flexibility in varying his communication style with others who may be different from himself. This flexibility and the ability to interpret the needs of others is the mark of a superior salesperson.

<p>When selling to a person who is dependent, neat, conservative, perfectionist, careful and compliant:</p> <ul style="list-style-type: none"> ● Prepare your "presentation" in advance. ● Stick to business--provide fact to support your presentation. ● Be accurate and realistic--don't exaggerate. <p>Factors that will create tension:</p> <ul style="list-style-type: none"> ● Being giddy, casual, informal, loud. ● Wasting time with small talk. ● Being disorganized or messy. 	<p>When selling to a person who is ambitious, forceful, decisive, strong-willed, independent and goal-oriented:</p> <ul style="list-style-type: none"> ● Be clear, specific, brief and to the point. ● Stick to business. Give an effective presentation. ● Come prepared with support material in a well-organized "package." <p>Factors that will create tension:</p> <ul style="list-style-type: none"> ● Talking about things that are not relevant to the issue. ● Leaving loopholes or cloudy issues. ● Appearing disorganized.
<p>When selling to a person who is patient, predictable, reliable, steady, relaxed and modest:</p> <ul style="list-style-type: none"> ● Begin with a personal comment--break the ice. ● Present yourself softly, nonthreateningly and logically. ● Earn their trust--provide proven products. <p>Factors that will create tension:</p> <ul style="list-style-type: none"> ● Rushing headlong into the interview. ● Being domineering or demanding. ● Forcing them to respond quickly to your questions. 	<p>When selling to a person who is magnetic, enthusiastic, friendly, demonstrative and political:</p> <ul style="list-style-type: none"> ● Provide a warm and friendly environment. ● Don't deal with a lot of details, unless they want them. ● Provide testimonials from people they see as important. <p>Factors that will create tension:</p> <ul style="list-style-type: none"> ● Being curt, cold or tight-lipped. ● Controlling the conversation. ● Driving on facts and figures, alternatives, abstractions.



Rainmaker Sales Strategy Index tm

Examinee: - **JONATHAN HIGGS**

Company: - ABC Industries

Date: - December 17, 2011

SALES TRAINING & DEVELOPMENT INSIGHTS

> INSTRUCTIONS PART TWO:

CONTENTS:

- **BASIC SALES SKILLS** - Analysis
- **ADVANCED SALES SKILLS** - Analysis
- **RATINGS & RANKINGS**

Understanding Rainmaker Sales Development - Go to: www.analyst-link.net

Click on the Navigation Link Labeled - **SDP workbook
Select and Print out Guide (#18)**

Complete the worksheets and create an Action Plan.

SAMPLE REPORT

The SSI identifies sales knowledge in the following categories:

- **Prospecting:** *The first step of any sales system. It is the phase of the sale where prospects are identified, detailed background information is gathered, the physical activity of traditional prospecting is coordinated and an overall strategy for face-to-face selling is developed.*
- **First Impressions - Greeting:** *The first interaction between a prospect and the salesperson. This step is designed to enable the salesperson to display his or her sincere interest in the prospect, and to **gain** positive acceptance and to develop a sense of mutual respect and rapport. It is the first phase of trust building and sets the selling process in motion.*
- **Qualifying/Questions:** *The questioning and detailed needs analysis phase of the sale. This step of selling enables the salesperson to discover what the prospect will buy, when they will buy and under what conditions they will buy. It is allowing the prospect to identify and verbalize their level of interest and specific detailed needs in the product or service the salesperson is offering.*
- **Demonstration:** *In this step, the salesperson should present his or her product in such a way that it fulfills the stated or implied needs or intentions of the prospect as identified and verbalized in the Qualification step.*
- **Influence:** *What people believe enough, they act upon. This step is designed to enable the salesperson to build value and overcome the tendency that many prospects have of placing little belief or trust in what is told to them. It is this phase of the sale that solidifies the prospect's belief in the supplier, product or service and the salesperson.*
- **Close:** *The **final** phase of any selling system. This step encompasses asking the prospect to buy, dealing with objections, handling any necessary negotiation and completing the transaction to mutual satisfaction.*
- **General:** *This area represents an overall understanding of the sales process. Knowledge of the process can lead to a positive attitude toward sales and a commitment to the individual sales steps.*

BASIC SALES STRATEGIES

The information that follows is designed to assist you in interpreting the "Sales Strategy Index tm ."

THIS SECTION CONTAINS:

INTRODUCTION

PRIMARY AND SECONDARY EFFECTIVENESS RATING GRAPH

This Graph Measures "Basic" Sales ability -

The combination of both primary and secondary sales Skills effectiveness ratings provides broad-based selling skill analysis for:

- Executives and Business Development
- Inside Sales
- Contract or Bid Sales
- Telemarketing Sales
- Account Maintenance (Relationship Sales)
- Route Sales
- Sales trainee

It should be noted that even in cases where General Sales abilities or the overall total exceeds or matches top sales performers, direction of effort should be focused on any skill that is less than the "standard" set by top performers.

CATEGORY ANALYSIS

Like any profession, selling has a body of knowledge related to successful execution. It is this knowledge that is measured by the Sales Skills Index. Understanding effective sales strategies will lead to success upon implementation of the recommendations contained herein.

UNDERSTANDING SKILL CLUSTERS:

INSIDE SALES - One may usually eliminate Prospecting as a necessary skill for inside sales; however, Demonstration, First Impression, Influence, and Closing are requisite to success.

CONTRACT OR BID SALES - Prospecting is not a vital component of the job, neither is qualifying. The key traits are Influence and First Impression followed by Demonstration, Closing, and high task orientation.

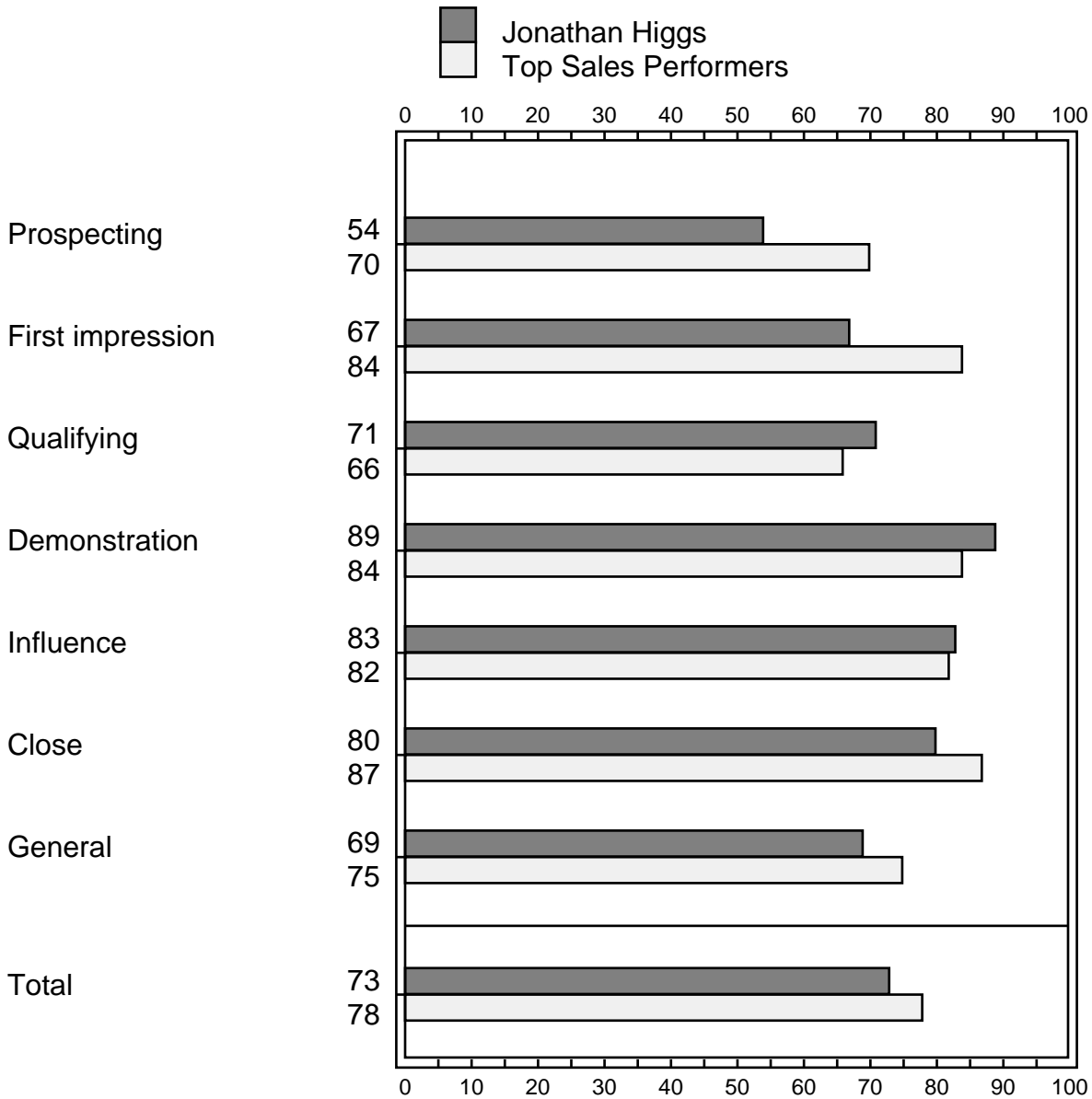
TELEMARKETING SALES - All traits are important but the greatest strength must of necessity be Prospecting.

RELATIONSHIP SALES - Demonstration is often the most vital trait followed by First Impression, Influence, and Closing.

TERRITORY DEVELOPMENT SALES - All traits are important. Pay specific attention to Prospecting, Qualifying, & Closing.



This graph illustrates your overall knowledge of the most and second most effective sales strategies. The higher your score in any segment, the better your broad understanding of the overall sales strategy required in that step of a successful sale.





Name: **Jonathan Higgs**

PROSPECTING / QUALIFY: The first step of any sales system. It is the phase of the sale where prospects are identified, detailed background information is gathered, the physical activity of traditional prospecting is coordinated and an overall strategy for face-to-face selling is developed.

(2/13) 15% of the time you chose the most effective strategy

(5/13) 39% of the time you ranked the second most effective strategy as your first choice

FIRST IMPRESSION / GREETING: The first face-to-face interaction between a prospect and the salesperson, this step is designed to enable the salesperson to display his or her sincere interest in the prospect...to gain positive acceptance and to develop a sense of mutual respect and rapport. It is the first phase of face-to-face trust building and sets the face-to-face selling process in motion.

(5/9) 56% of the time you chose the most effective strategy

(1/9) 11% of the time you ranked the second most effective strategy as your first choice

QUALIFYING / QUESTIONS: The questioning and detailed needs analysis phase of the face-to-face sale, this step of selling enables the salesperson to discover what the prospect will buy, when they will buy and under what conditions they will buy. It is allowing the prospect to identify and verbalize their level of interest and specific detailed needs in the product or service the salesperson is offering.

(2/7) 29% of the time you chose the most effective strategy

(3/7) 43% of the time you ranked the second most effective strategy as your first choice



Name: **Jonathan Higgs**

DEMONSTRATION: The ability of the salesperson to present his or her product in such a way that it fulfills the stated or implied needs or intentions of the prospect as identified and verbalized.

(3/9) 33% of the time you chose the most effective strategy

(5/9) 56% of the time you ranked the second most effective strategy as your first choice

INFLUENCE: What people believe enough, they act upon. This step is designed to enable the salesperson to build value and overcome the tendency that many prospects have to place little belief or trust in what is told to them. It is this phase of the sale that solidifies the prospect's belief in the supplier, product or service and salesperson.

(4/6) 67% of the time you chose the most effective strategy

(1/6) 17% of the time you ranked the second most effective strategy as your first choice

CLOSE: The final phase of any selling system. This step is asking the prospect to buy, dealing with objections, handling any necessary negotiation and completing the transaction to mutual satisfaction.

(4/10) 40% of the time you chose the most effective strategy

(4/10) 40% of the time you ranked the second most effective strategy as your first choice

GENERAL: This area represents an overall understanding of the sales process. Knowledge of the process can lead to a positive attitude toward sales and a commitment to the individual sales steps.

(4/13) 31% of the time you chose the most effective strategy

(5/13) 39% of the time you ranked the second most effective strategy as your first choice

ADVANCED SALES STRATEGIES

CONTENTS:

PRIMARY EFFECTIVENESS RATING GRAPH - (Advanced Selling Skills)

Ratings that meet or exceed those of Top Sales Performers in the Primary (or Advanced) effectiveness graph indicate competency in:

- Brokerage/Financial/Insurance Sales
- Outside Sales (Territory Development)
- Placement Sales
- Consulting Sales
- Travel Sales
- Trade Show Selling

Direction of effort should be focused on any skill that is less than the "standard" and where training is recommended.

QUESTION ANALYSIS

SKILL INTERACTIONS

PROSPECTING - is the key to advanced selling. Low scores in this skill often indicate burnout or Call Reluctance. Behaviorally, prospecting is linked to Challenge and Drive

QUALIFYING - is the often considered the key skill. Expend the greatest effort on those who have a need for the product (or service being sold) and have the authority to make the purchasing decision. Link qualifying with sound closing techniques.

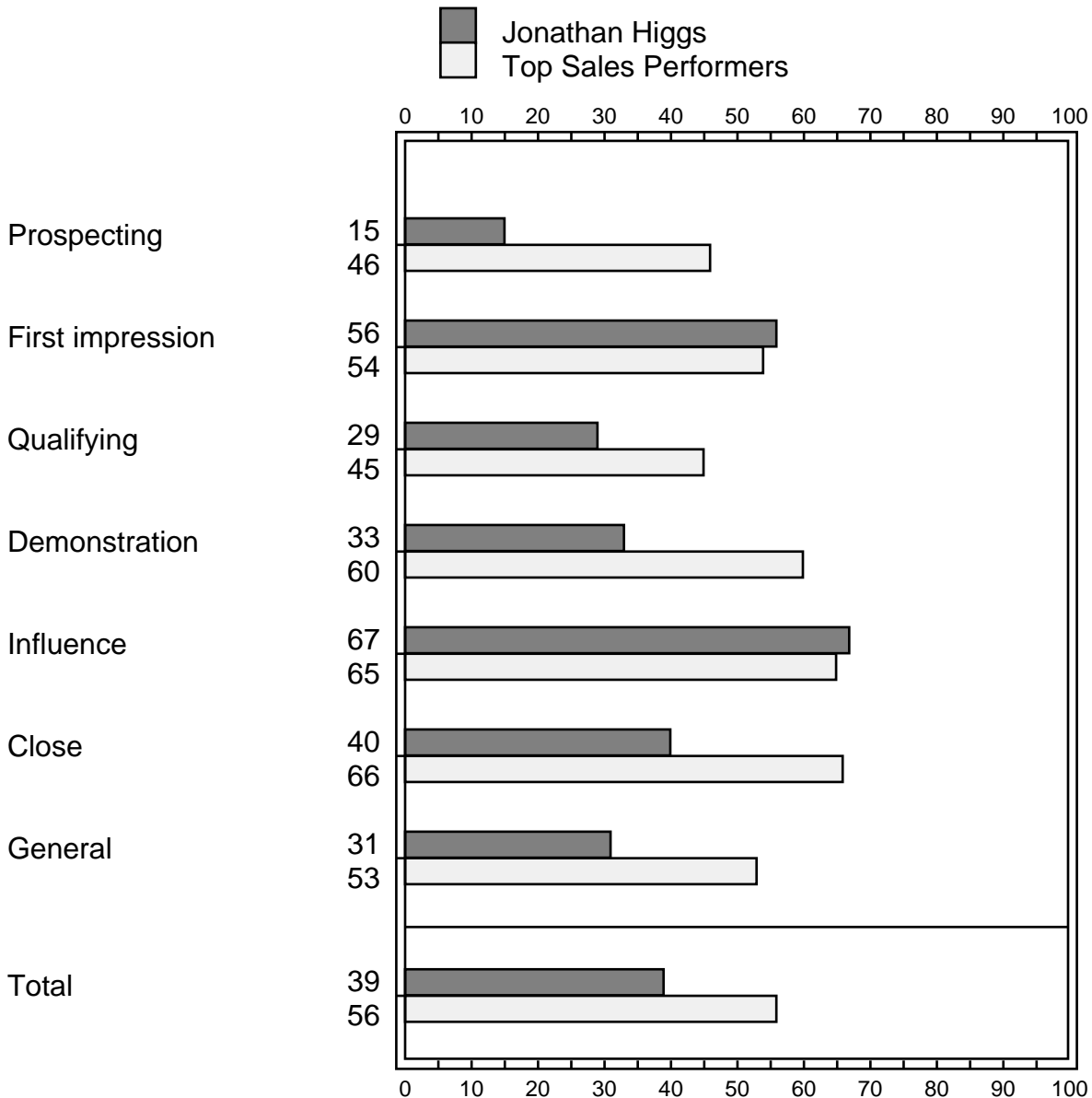
FIRST IMPRESSION / DEMONSTRATION - these skills work together to add credibility to the sales presentation. Critique your presentation on video. Include Social Skills here: Manners, Dress, Grooming, Vocabulary, Interpersonal skills, and Communication ability.

INFLUENCE - is the precursor to Closing. Influence is akin to the behavioral trait, persuasiveness. Those who know their product, the competition, and their clients' needs, can often become strategically aligned with their customers and influence the purchasing decision.

CLOSING - requires a certain amount of intuitiveness. Knowing when to close is as important as knowing a variety of closing techniques. Closing the sale is validation of your skill as a salesperson.



The following graph illustrates YOUR understanding of the most effective sales strategy in a series of sales situations. Research validates that understanding and applying an effective sales strategy is directly related to sales success. The higher the score in any particular area the stronger your specific understanding of what is required to be successful in the sales process.





Name: **Jonathan Higgs**

QUESTION ANALYSIS

- 24 times chose the MOST effective strategy
- 24 times chose the SECOND most effective strategy as #1
- 10 times chose the THIRD most effective strategy as #1
- 9 times chose the LEAST effective strategy as #1

LEAST EFFECTIVE STRATEGY ANALYSIS

Please review the following questions. In these situations you selected the least effective strategy as the most effective strategy. For each question listed, the most effective strategy is provided for your review.

5. Very early in your presentation, the prospect says, "How much is it?" You should:
 - D. Advise the prospect you will be discussing the price once you cover the benefits he will receive.

7. In talking with your prospect, you discover she is new in the position and is unaware about the past, as well as immediate or future needs. You should:
 - D. Offer to partner with her and assist her in gaining knowledge at a more rapid pace.

8. You approach your prospect and discover the person you are seeing is not in a position to make any type of buying decision. You should:
 - A. Continue to sell in order to develop an internal advocate.



12. After you have been with a prospect for 45 minutes, and he says, "We're done. I'm out of time." You should:
- D. Ask the prospect what additional information she needs.
24. Upon contacting a prospect, he says, "I want to talk to you...I believe you have exactly what I'm after." On the basis of this comment, you should:
- D. Make an appointment to further qualify the buyer.
30. Early in your presentation your prospect says, "I'll listen, but I'm not going to buy anything right now...no matter what!" You should:
- A. Advise the prospect you are not there to sell anything, but to discover if he has a need for your products.
39. Sales tools and aids should be used to:
- A. Develop interest.
46. While prospecting for new business, you meet a prospect who says, "We've done business with your firm in the past and, frankly, we dropped you as a vendor." You should:
- B. Ask "What was the reason for that decision?"
62. Rank the following prospecting strategies from best to worst
- D. Referral selling.

SALES SKILLS - DEVELOPMENT GUIDELINES

The ability to sell in a competitive environment requires ever increasing levels of professionalism, motivation, and skill. It is not sufficient to review this report to learn about your weaknesses; you must be motivated enough to do something about them.

Professional salespeople often go through a "call reluctance" or "burnout" cycle. The best salespeople occasionally suffer downturns that may be caused by their attitude toward the job. Instead of each day being a source of new opportunity and full of challenge, it becomes ordinary and routine. The net result is - your income suffers.

Is the job routine or has your response to the job become routine?

Do you use the same closing techniques, do you tell the same story over and over again? Consider for the moment the possibility that over a period of time a series of negative influences and bad habits has been permitted to dilute your real abilities. Like any bad habit, these negative influence cycles are difficult to break. Training helps, but the best way to overwrite negative traits is through the repetition of positive influences.

Use the Sales Skills Index report to identify areas in need of improvement . Review the report carefully and either read some of the excellent Sales books on the market or purchase a sales development system on audio tape that train in your weakest areas. We often recommend audio tape systems as they can make good use of your travel time. Your car should be your learning center.

AUDIO TAPE IMPLEMENTATION:

*For audio development systems to be effective, you must employ repetitive listening techniques to **overwrite negative selling patterns**. Listen to each tape once daily, five days in a row. On the 6th day listen to it again and fill out the workbook that accompanies the program. Write a brief summary detailing the three most important things you learned from listening to the tape and the one change you intend to make in your selling style. You may then proceed to the next tape. A six tape series will take six weeks to effectively imprint positive selling traits. Your test administrator will be able to recommend specific training tapes suited to your needs.*

SALES DEVELOPMENT BOOKS:

There are many good books designed to improve professionalism in sales. To influence change, all books should be absorbed using the same techniques we described in the audio tape program, that is, read each chapter several times, and write a brief summary detailing the three most important things learned by reading that chapter and the one change you will make in your selling style. Contact your test administrator for specific recommendations.