

Sales Performance Assessment

SPA Candidate Report

Chris Williams

ABC Company



Introduction

The SPA Candidate Assessment presents the results of a sales assessment on Chris Williams as part of a candidate selection process for a sales role at ABC Company. This report is organized into four sections:

Sales Profile

This individual completed the Sales Performance Assessment (SPA) questionnaire which measures how a person approaches the sales role in terms of 24 characteristics. This section provides this individual's SPA results against the role requirements of the position. This individual's scores on each of the 24 dimensions are shown by a "dot". The role requirements for the position are shown by a shaded range.

Job Match

This section summarizes the information presented in the SPA profile by listing those sales dimension scores which fall within the targeted role requirements range as well as those dimensions that fall below the targeted role requirements range.

Assets and Potential Challenges

Based on this individual's SPA profile, this section presents a narrative summary of this candidate's assets in the sales role as well as some of the potential challenges the candidate may encounter in fulfilling the responsibilities of the role.

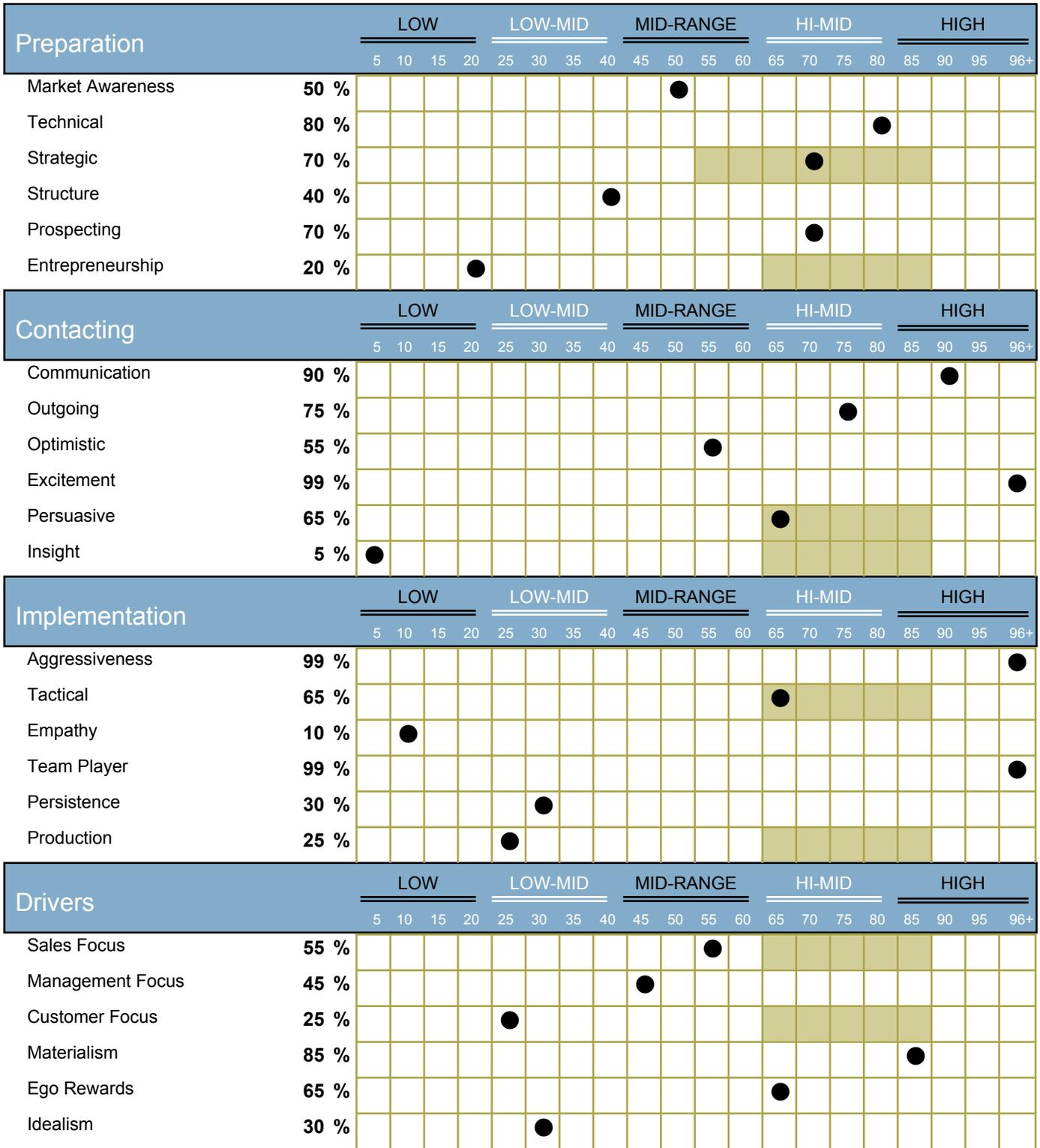
Interview Questions

This section presents several interview questions that can be used to further explore this candidate's sales profile and approach to sales in more depth.

Caution:

This SPA Candidate Assessment should be considered as only one component of the sales selection process. In reviewing the results of this assessment it is extremely important to consider all factors when evaluating this candidate including:

- ♦ Prior Work History
- ♦ Job Interviews
- ♦ Relevant Life Experiences
- ♦ Education
- ♦ References
- ♦ Other Job Relevant Information



PREPARATION

Market Awareness: Understanding market trends and analyzing customer buying patterns.

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

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

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

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

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

CONTACTING

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

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

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

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

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

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

IMPLEMENTATION

Aggressiveness: Engaging with others in a forceful and competitive manner.

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

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

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

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

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

DRIVERS

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

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

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

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

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

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

Role Requirements Match

This section compares the approach Chris Williams would take in the role to the role requirements profile. Chris Williams is within or above the role requirements range for the following variables:

- ◆ **Strategic**
- ◆ **Persuasive**
- ◆ **Tactical**

Chris Williams is below the role requirements range for the following variables:

- ◆ **Entrepreneurship**
- ◆ **Insight**
- ◆ **Production**
- ◆ **Sales Focus**
- ◆ **Customer Focus**

Assets

Based on the sales profile of Chris Williams, the following characteristics are likely to contribute to potential effectiveness as a sales professional:

1. Spontaneous, enthusiastic energy; pays attention to the emotional dimensions of the sales process; keeps people enthusiastic and engaged; builds commitment for products/services and the company through excitement.
2. Forceful approach to sales; pays close attention to closing the sale; competitive and energized by winning; can be successful in handling the difficult sale; not afraid to ask for the order.
3. Loyal team player in the company; follows the company's agenda; supports the company; good at following company sales plans and policies; attentive to home office relationships; sells what the company can support; unlikely to overpromise; represents the company well.
4. Open and clear customer communication; emphasizes the importance of keeping customers well informed; educates the customer; ensures customers have all their information needs met; develops customer loyalty
5. Strongly motivated by financial and material incentives; drawn to material rewards; responds well to financial incentives; likely to be more motivated by a highly leveraged compensation plan.
6. Takes pride in having extensive product knowledge; has an in-depth understanding of how the products/services work and how they can meet customer needs; will be comfortable with challenging questions; customers who appreciate understanding the details of a product or service will value this individual's expertise.
7. Friendly, accepting and informal with customers; focuses on the interpersonal aspects of selling; gregarious, affable and has an easy way with people; often turns customers into friends.
8. Takes a long term planning and incisive thinking approach to sales; comfortable tackling tough problems; prefers to take a planned, logical approach to selling and building business.

9. Devotes attention to finding potential customers; builds up the lead pipeline; sees many situations as an opportunity to network in order to build/expand prospect list.

Potential Challenges

Based on the sales profile of Chris Williams, the following characteristics may potentially reduce performance and potential as a sales professional:

1. May be less insightful about people and their motivations; may not read people accurately; may miss changes in customers' moods and sometimes miss important subtleties; may not see customers as unique individuals and may sometimes rely on a more uniform, one-size-fits-all approach to sales.
2. May not be attentive enough to customer's support needs; may at times come across as too self-serving; may not make time to establish relationships with customers; may appear to be less concerned with customer's wellbeing.
3. May be too limited in ideas; may be more comfortable with the status quo; can sometimes miss opportunities by being too limited in focus; not always as ambitious or skilled at negotiating; may tend to follow the company sales formula too strictly to generate business in some circumstances.
4. May not always be focused enough on ambitious goals; may become discouraged in challenging sales situations; may believe that challenging goals are unattainable or require sacrifices that are too significant.
5. May not be focused enough on serving the customer; may have a more utilitarian view of the customer as merely a sale; may be too focused on short term sales objectives over building long term customer relationships; may miss the opportunity to gather valuable customer insights to share with the company; may jeopardize the potential for repeat business.
6. May give up too easily; may not be as disciplined with follow-through; may have trouble staying focused during long sales cycles; may be more attracted by the new opportunity than managing the existing opportunities; may start strong but lose momentum.
7. Unlikely to view the sales role, the company or the products in an idealistic way; may be too expedient; may fail to take a stand on issues; may be inclined to tell the truth attractively and be distrusted by some customers as a result.

8. May over share with customers; may sometimes overwhelm customers with information; may not adjust communication approach to different customer needs; may sometimes be less focused than ideal in communications.
9. May be too dependent on the company; may lack independent initiative; may miss good opportunities in the field that are not specifically identified in the sales plan; may hesitate to challenge the company or team to improve.
10. May sometimes be overly dramatic; may be less appealing to more reserved customers; may be taken less seriously if does not also demonstrate expertise; may experience more emotional ups and downs than someone with less emotional intensity.
11. Sometimes too forceful and aggressive; can turn people off with high pressure tactics; may create competitive situations where unnecessary; some customers may feel intimidated; may sometimes come across as too dominant with colleagues.

INTERVIEW QUESTIONS – Insight

Chris Williams scored low on **Insight** indicating less emphasis placed on understanding why people behave as they do and less emphasis using this understanding to determine customer's needs. This may result in this person missing changes in the customer's moods and sometimes missing important subtle signals in the sales process. This may reduce this person's effectiveness when the sales role requires this individual to:

- Quickly read the customer's needs and expectations
- Adapt rapidly to changes in customer reactions
- Use insights to manage the flow of the sales process and quickly recognize opportunities
- Listen and watch carefully to gather the most knowledge possible about the customer

Use one or more of the following interview questions to explore the orientation Chris Williams has towards **Insight**:

1. Please tell me about the customer you find most interesting. Tell me about the major characteristics of the customer: strong/weak points, hot buttons, what you do and don't like about this customer.
2. What would you say are the three or four motivations that most of your customers have in common?
3. Please describe a situation where you misread a customer's cues. In hindsight, what signals did you miss or misread?
4. What do you look for to gain insight about whether a customer is starting to lose interest? What signals do you notice when they are getting close to finalizing a deal with you?
5. How do you know when to slow the sale process down versus when to speed it up?

NOTES:

INTERVIEW QUESTIONS – Entrepreneurship

Chris Williams scored low on **Entrepreneurship** indicating less emphasis placed on being creative, independent or risk oriented. This may result in this person being very invested in the status quo, and potentially more cautious and dependent on the home office than is ideal. This may reduce this person's effectiveness when the sales role requires this individual to:

- Be creative and open to new ideas
- Demonstrate independence in thinking and action
- Take initiative to pursue new opportunities
- Be bold in taking risks to achieve ambitious results

Use one or more of the following interview questions to explore the orientation Chris Williams has towards **Entrepreneurship**:

1. Please give me some recent examples of innovative approaches you have taken to sales.
2. Have you been able to develop any unique applications for the product line that you represent? Please give some examples.
3. How open is your current company to ideas and suggestions from the field force about different ways in which things might be done? (If company is open:) please give examples of how suggestions of yours have been utilized. (If company is not open:) what ideas have you been able to use on your own without having to involve the company?
4. To what extent have you been able to open up present customers to business beyond what they were doing before?
5. Please give an example where being more independent minded in your sales role helped you win an important sale.
6. Please give an example of where not taking a risk lost you a sales opportunity. In hindsight, how would you have changed your approach?

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INTERVIEW QUESTIONS – Production

Chris Williams scored low on **Production** indicating less emphasis spent setting very high standards for achievement and having a strong results orientation. This may result in this person not meeting some ambitious goals or potentially demonstrating uneven effort in working hard to get ahead. This may reduce this person's effectiveness when the sales role requires this individual to:

- Set and deliver against high standards
- Stay focused on the results as the top priority
- Work in a highly ambitious environment
- Push through the obstacles to high achievement

Use one or more of the following interview questions to explore the orientation Chris Williams has towards **Production**:

1. Please describe the most demanding job that you've ever had. What made it so challenging? In what ways did these challenges motivate you?
2. To what degree do you think a strong achievement orientation influences how successful a sales person is? What other things do you think are critical to success?
3. What goals have you set for yourself over the next few years? How do these compare with goals you have set in the past? How successful have you been in achieving the goals you have set?
4. Please describe a situation where did not meet an important sales goal. What were the reasons for this? Looking back, would you have done anything differently that could have affected the outcome?
5. How do you determine how much effort you are willing to put into sales opportunities?
6. How would you distinguish between an ambitious, achievable goal and a goal that is too ambitious and, therefore, unattainable?

NOTES:

INTERVIEW QUESTIONS – Customer Focus

Chris Williams has scored low on **Customer Focus** indicating less importance placed on putting the interests of the customer first and less time spent on anticipating customer needs or fighting for the customer. This may result in this person spending less time listening to and advocating for customers than would be ideal. This may reduce this person's effectiveness when the sales role requires this individual to:

- Place significant emphasis on customer service
- Champion the customer's interests
- Provide customer input to the company
- Build customer loyalty by ensuring their needs are met

Use one or more of the following interview questions to explore the orientation Chris Williams has towards **Customer Focus**:

1. What types of customer requests do you find the most frustrating or potentially unreasonable?
2. How would some of your more challenging or difficult customers describe your relationship with them? How might this differ from how some of your best customers would describe their relationship with you?
3. To what degree do you relay customer feedback to your organization? How does your organization respond to that feedback?
4. How do you determine when to put your customers' interests first and when to put your company's interests first? What conflicts between these two interests pose the greatest challenge for you?
5. How would you describe the balance you have to strike between serving your customers and selling to your customers?
6. What do you think are the most important things you need to focus on to build customer loyalty?

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INTERVIEW QUESTIONS – Empathy

Chris Williams scored low on **Empathy** indicating less emphasis placed on being sensitive to others feelings and building close, supportive relationships with customers. This may result in this individual being seen as less helpful and less interested in their wellbeing by some customers. This may reduce this person's effectiveness when the sales role requires this individual to:

- Establish long-term, close relationships with customers
- Work with customers who need or expect a more personal connection to secure their loyalty
- Be an effective listener
- Support others and help them achieve their objectives

Use one or more of the following interview questions to explore the orientation Chris Williams has towards **Empathy**:

1. Please give an example of a time when you have gone out of your way to help a customer when they were in a difficult situation.
2. How would you describe your relationship with your closest customer? How does this differ from the relationships you have with some of your other customers?
3. Will you please describe a situation where you felt a customer expected a closer relationship with you then you wanted to offer?
4. Do you think it is more beneficial to be more emotionally connected to your customers or to maintain more emotional distance from your customers? What are the risks and benefits to this approach?
5. Have you ever had a customer you really didn't like? How did you manage this relationship?

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INTERVIEW QUESTIONS – Persistence

Chris Williams has scored low on **Persistence** indicating less emphasis placed on demonstrating persistence and follow-through to achieve success. This may result in this person sometimes giving up too easily or being somewhat slower to follow-up on customer requests. This may reduce this person's effectiveness when the sales role requires this individual to:

- Stay on top of longer, more complex sales
- Being disciplined in managing activities
- Keep from being discouraged in the face of obstacles
- Be especially attentive to following through on customer requests

Use one or more of the following interview questions to explore the orientation Chris Williams has towards **Persistence**:

1. Please describe a sales situation where there were several unexpected setbacks or obstacles. How did you manage that situation? Were you ever tempted to give up on this situation and instead pursue other, less difficult, opportunities?
2. Will you please describe a sales situation that took much longer than usual to finalize the sale? How did your approach to this situation differ from your approach to shorter sales processes?
3. Please describe a situation that you now believe you gave up on too easily. Why did you decide to give up when you did? What would you do differently now?
4. If you were to divide the sales process into three phases – the initial phase; the middle of the sales process; and the closing phase – which phase do you think is your strongest? Your weakest? Why?
5. What signals do you look for that help you determine whether it makes sense to be tenacious and continue to pursue the sale or whether it would be wiser to pursue other opportunities?

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ADDITIONAL NOTES:



There is no limit to where insight can take you

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