



**Sample Report**  
**3/25/2011**



# INTRODUCTION

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This Sales Effectiveness Feedback Report consists of six components, which are described below.

## **1. Overall Summary**

The summary results chart provides a quick visual representation of your scores in the seven competencies that make up the Sales Effectiveness profile. The areas to concentrate on are those scores above 3.5 (strong) and below 2.75 (need further development). Please note that these competency scores are averages; individual question scores can be viewed by clicking on the individual competency link.

## **2. Category Descriptions**

There are three sections for each of the seven competencies. The first of these three sections explains the competency, lists average scores, and then provides high and low score interpretation notes. The second section provides a graphical representation of individual question scores. The third section provides broadly-based improvement actions for those individuals wanting to develop their competencies.

## **3. 10/10 Report**

The "10/10" Report page provides the raw scores for the 10 highest scoring questions and the 10 lowest scoring questions out of the 84. It also identifies which competency each question is from.

## **4. Course and Reading Suggestions**

Development suggestions for the two lowest scoring competencies, including specific recommendations regarding training courses and books that will provide useful information on the topic are included.

## **5. Development Plan**

The development plan lists questions with the five lowest scores from the assessment and puts them into a one-page template. Individuals can use this template to record the specific actions they plan to take over the next twelve months based on the general guidance offered in their feedback report and the coaching tips.

## **6. Coaching Tips**

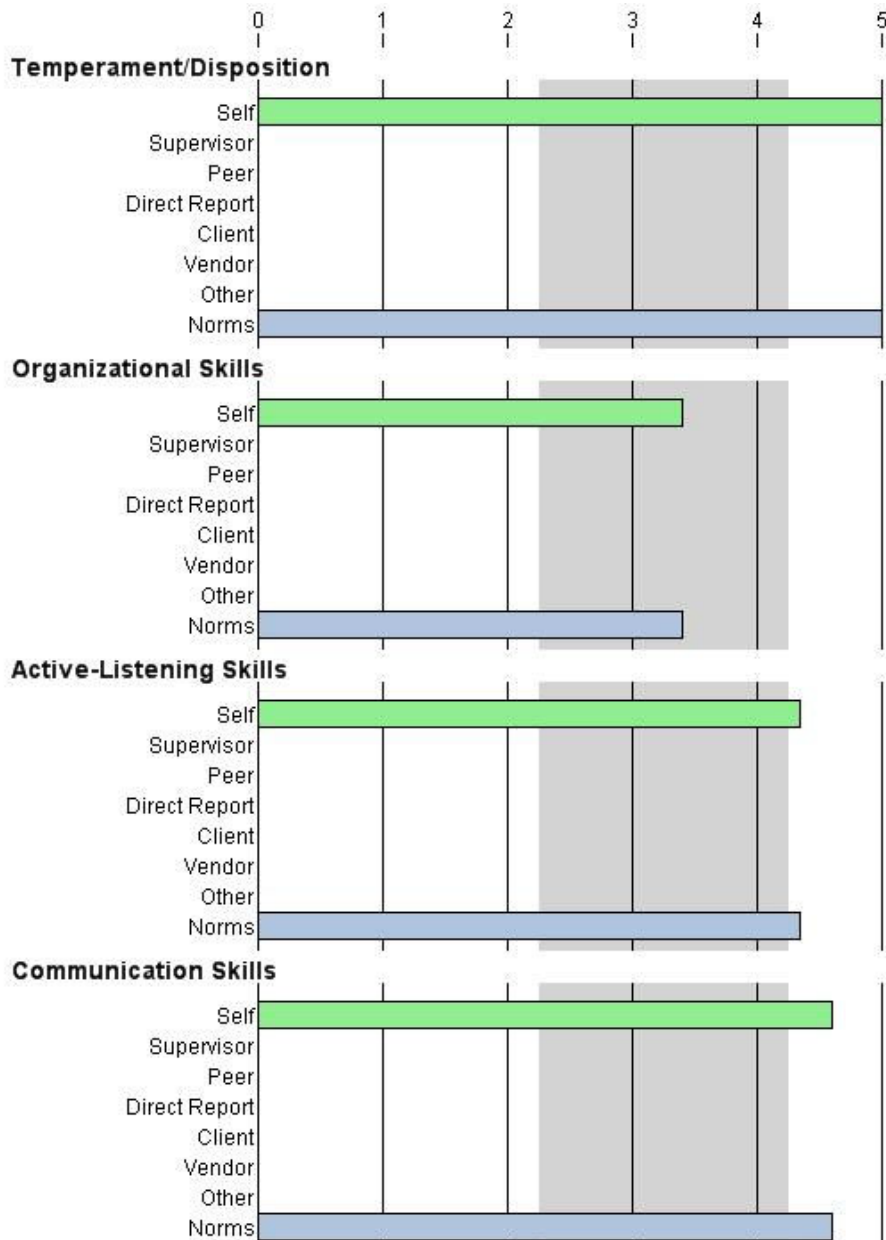
Detailed coaching tips for the five lowest scoring questions are provided in this section. They offer specific advice on what individuals might do to improve their skills in this competency and learn new behaviors.

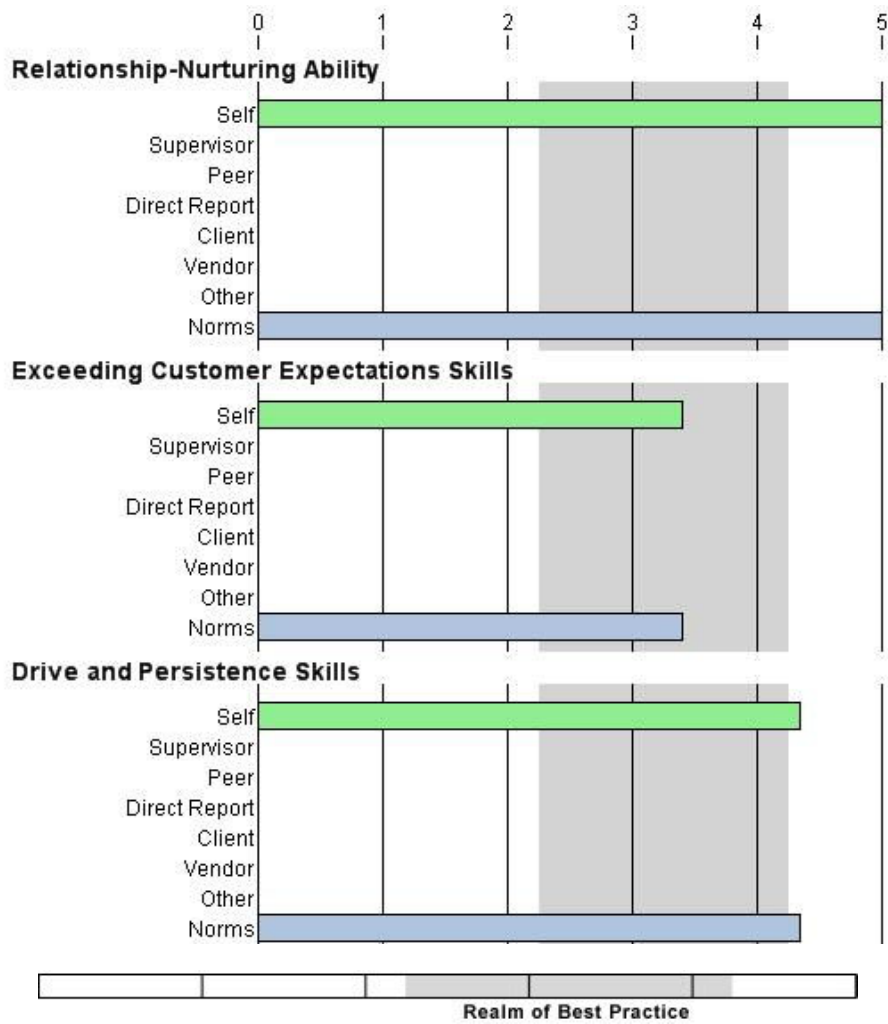
### **Note on 360 Degree Feedback**

If you received feedback from your supervisor, direct reports or peers using this assessment, please note the following: Ratings responses from all persons who completed the assessment are averaged to produce the results in the 10/10 Report, Course and Reading Suggestions, Development Plan, and Coaching Tips.



# OVERALL SUMMARY



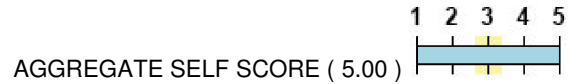


Norm bars shown on all graphs in this report are the progressive average scores of all individuals rating themselves on this questionnaire.



# TEMPERAMENT / DISPOSITION

Temperament/Disposition looks at your internal desire to find value and enjoyment through your relationships with other people and how comfortable you are at being in a sales situation. It asks the question: "How well do you operate on an open, information-sharing basis with old and new sales contacts?"



## Interpretation

### LOW (less than 2.75)

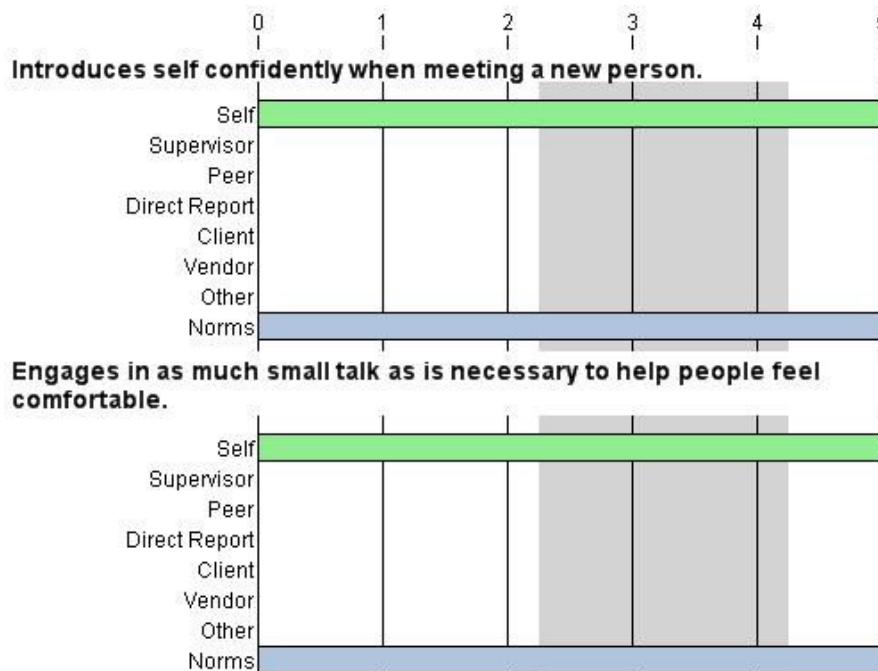
Response ratings predominantly in the ones and twos ("almost never" and "occasionally") suggest that you operate as a loner some or much of the time, doing much more by yourself than with and through other people. You are also likely to be selective about whom you talk to (usually only when you have a reason to initiate contact).

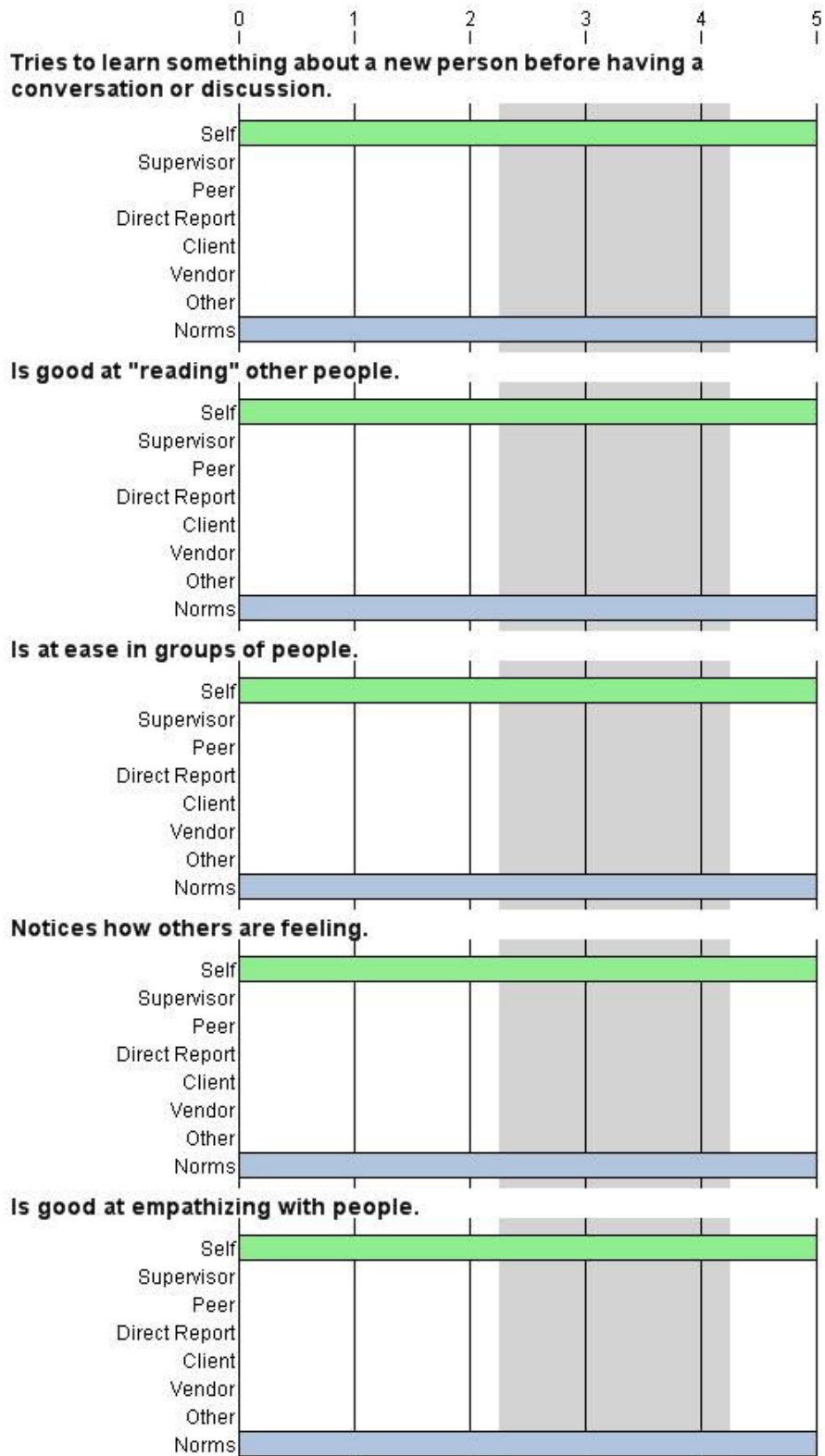
A low scorer is likely to lack general confidence about meeting new people and therefore only initiate contact when they feel the effort is likely to be tangibly worthwhile. Low scorers tend to consider most of their relationships with people as being "transactional," where the point is to make an exchange of some kind (on a like-for-like basis), rather than to offer benefits, solutions, and help.

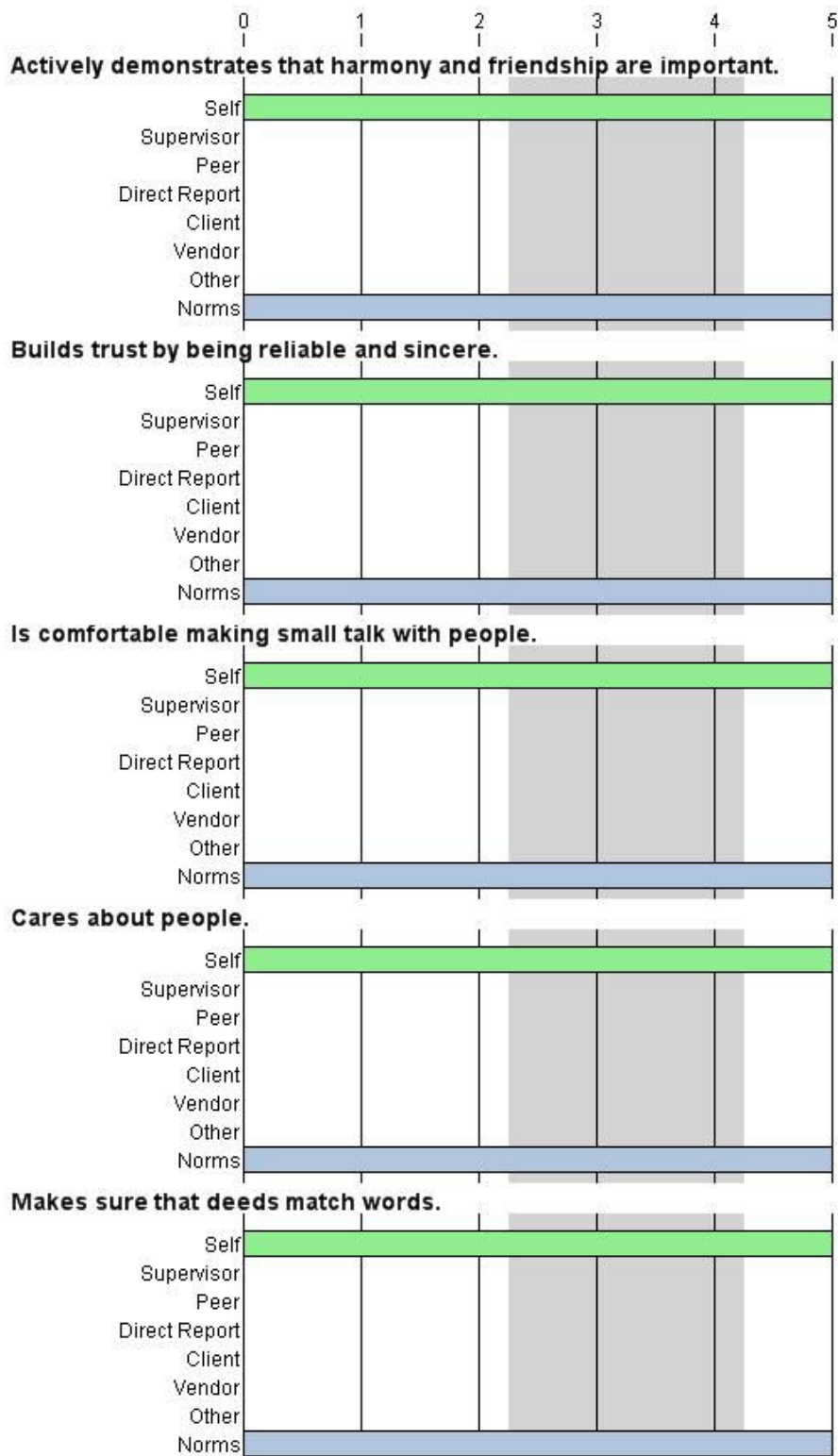
### HIGH (greater than 3.5)

Response ratings predominantly in the fours and fives ("very frequently" and "almost always") suggest that you are an easy-going and flexible individual who likes to work with and through people on a regular basis. You are likely to be happy to offer support and help, and are comfortable pointing out the advantages and benefits of particular solutions over others to your existing clients and prospective customers.

A high scorer is likely to go out of his or her way to build relationships with a wide range of people, offering support and creating the opportunity for greater influence and success in any selling situation. Many relationships will become deep and long-lasting friendships.







**Temperament/Disposition looks at your internal want or desire to find value and enjoyment through your relationships with other people and how comfortable you are at being in a sales situation. It asks the question: "How well do you operate on an open, information-sharing basis with old and new sales contacts?"**

### **Recommendations for Overall Improvement**

Low scorers need to find ways to become more at ease in talking to people in general; initiate more spontaneous informal conversations; and engage in small talk more often. Although it is not easy to quickly change in this area, low scorers can start by putting themselves more often in the shoes of others and try to be more empathetic.

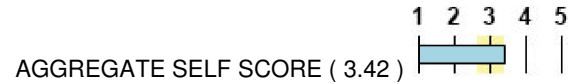
### **Ways to Strengthen or Improve Temperament/Disposition**

- Make a commitment to network more widely as a means to meeting more people, and strengthen your level of comfort in dealing with people you do not know well or at all.
- Develop the ability to look at issues and situations you encounter from the point of view of those involved, and think about what actions you could take to be helpful or supportive.
- Take the opportunity to talk to strangers or people you do not know well.
- Set yourself a daily target to engage in small talk or informal conversation with at least one person you do not know.



# ORGANIZATIONAL SKILLS

**Organizational Skills** looks at how well you use organizational and prioritization systems to efficiently and successfully sell to your sales contacts or prospects. It asks the question: "How effectively do you organize yourself and the information you gather about people to whom you intend to sell in order to maximize your chances of success?"



## Interpretation

### LOW (less than 2.75)

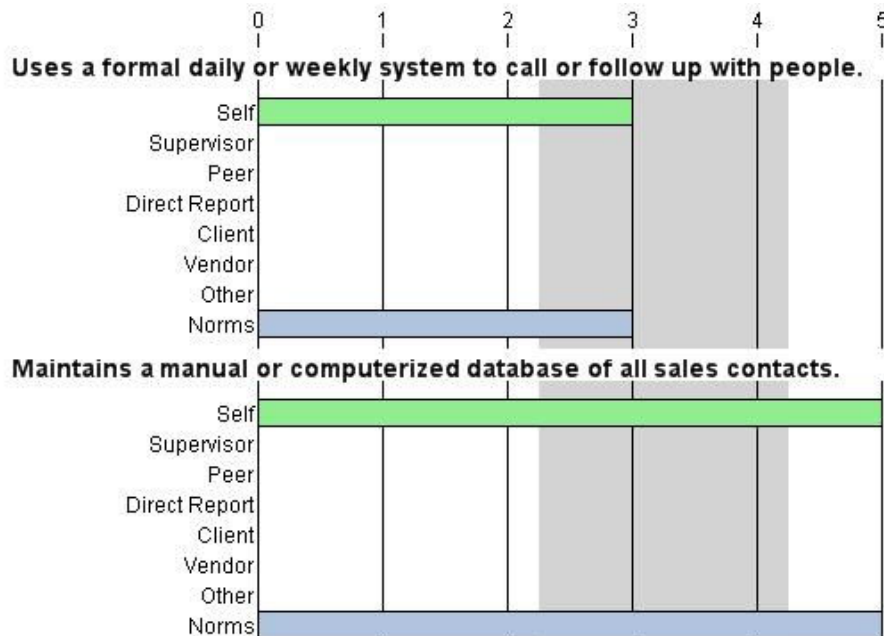
Response ratings predominantly in the ones and twos ("almost never" and "occasionally") suggest that you do little or no preparation and do not set up much in the way of organizational systems or gather relevant information that you might need to be successful at sales. As a result, you are more likely to lose cards, paper, phone numbers, etc., and have to expend more time than necessary in finding what you need (and sometimes have to look for the same information again and again).

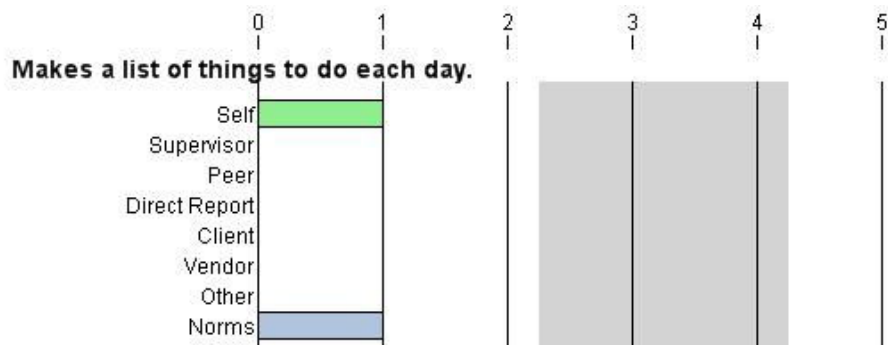
A low scorer tends to approach the whole selling process in a disorderly fashion and therefore find themselves repeating their efforts to find people or follow up with them. Low scorers are likely to keep only "loose" files or none at all, so they have no information to refer to when they need it.

### HIGH (greater than 3.5)

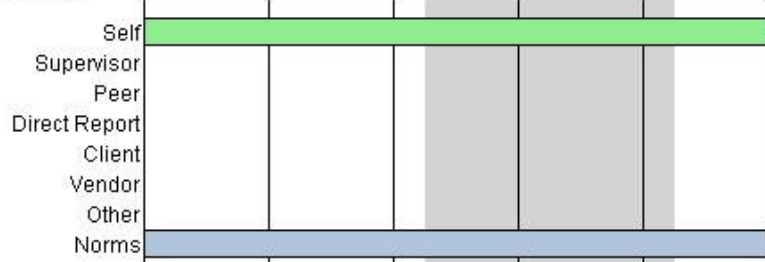
Response ratings predominantly in the fours and fives ("very frequently" and "almost always") suggest that you are serious about your sales networking and prospecting efforts and have set up a well-prepared and comprehensive system to keep track of your meetings and contacts. You are more likely to quickly retrieve information that you have researched or gathered in order to present well or follow up effectively.

A high scorer usually sets up a well-structured filing and data-collection system before initiating a serious sales effort, and thinks about how he or she will organize, collate, and categorize information. In addition, such people will understand the importance of following up with people and keeping any promises or commitments they make.





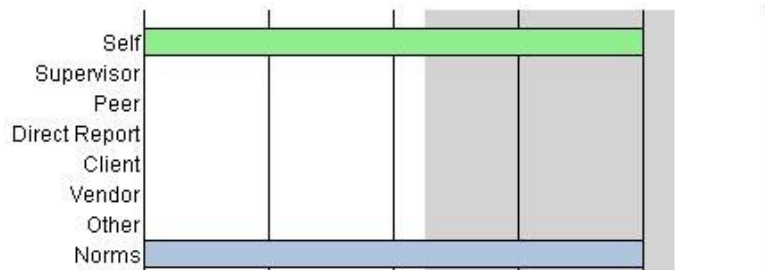
**Can quickly find the name, address, and phone number of all contacts and prospects.**



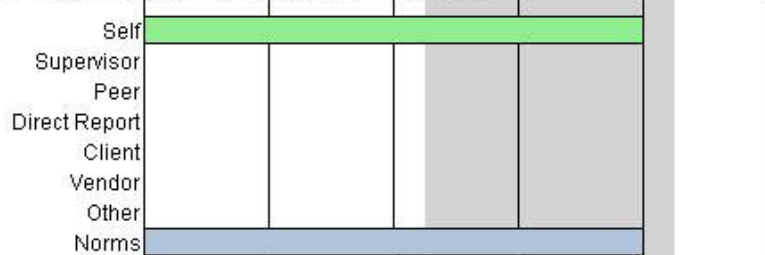
**Checks names off a daily sales contact list when the call has been made.**

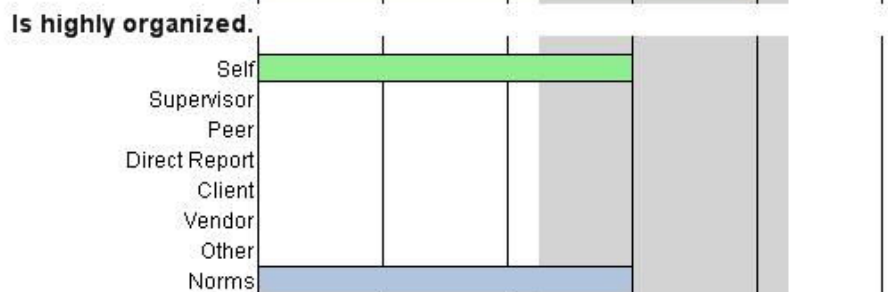
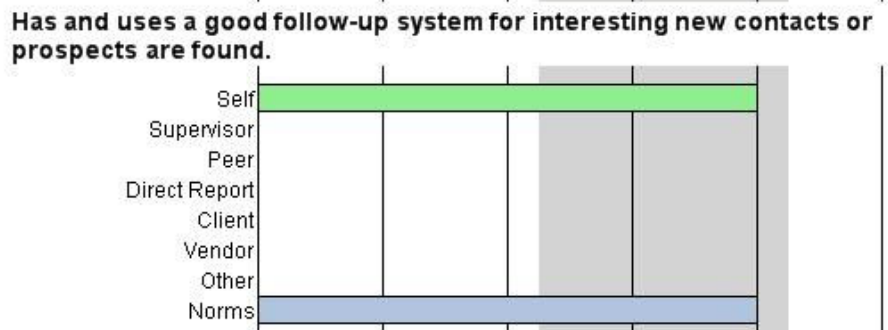
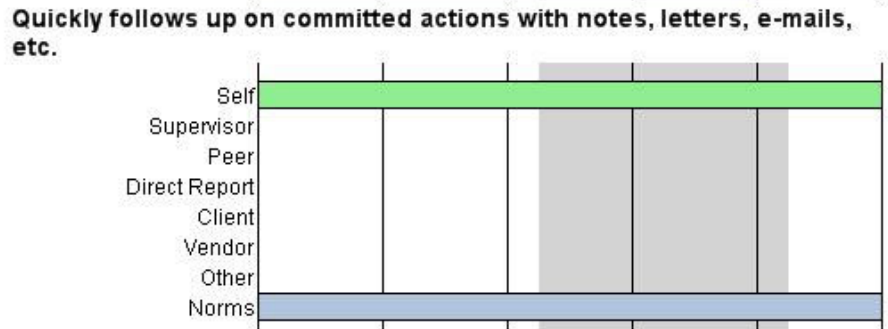
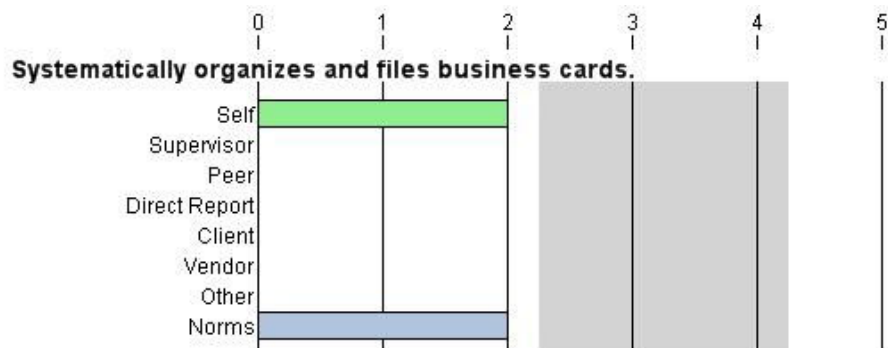


**Schedules time to read about upcoming events or opportunities to sell.**



**Follows through on promises and commitments.**





**Organizational Skills** looks at how well you use organizational and prioritization systems to efficiently and successfully sell to your sales contacts or prospects. It asks the question: "How effectively do you organize yourself and the information you gather about people to whom you intend to sell in order to maximize your chances of success?"

### **Recommendations for Overall Improvement**

Low scorers need to establish a contact management system (either manual or computerized) and force themselves to log information from sales-oriented meetings and conversations as soon as they occur. In addition, they should regularly transfer key data into the system including information from discussions with prospects and customers, leaflets, brochures, and business cards. They need to sort, categorize, and label the data so that it is easy to find when needed.

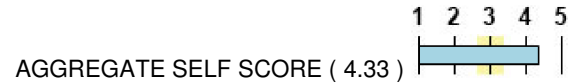
### **Ways to Strengthen or Improve Organizational Skills**

- Purchase, design, or adapt a sales/contact management system that is easy to use and easy to maintain. Use it to store, manage, and access all of your sales contact details.
- Teach yourself how to use your personal organization system properly and daily. At least once a month, review all the data you have collected, and categorize and prioritize it carefully.
- Develop the habit of making regular notes after all of your sales visits or meetings, and transferring the most relevant data to your contact management system.
- Regularly review the information that you collect on your sales prospects and your customers, and follow up with a letter, phone call, or e-mail. Record any responses that you get.



# ACTIVE-LISTENING SKILLS

Active-Listening Skills looks at how well you listen to and successfully "process" your sales prospect's or customer's messages (both verbal and non-verbal) before you respond. It asks the question: "How attentive or empathetic are you in ensuring that you've fully understood the customer's entire communication?"



## Interpretation

### LOW (less than 2.75)

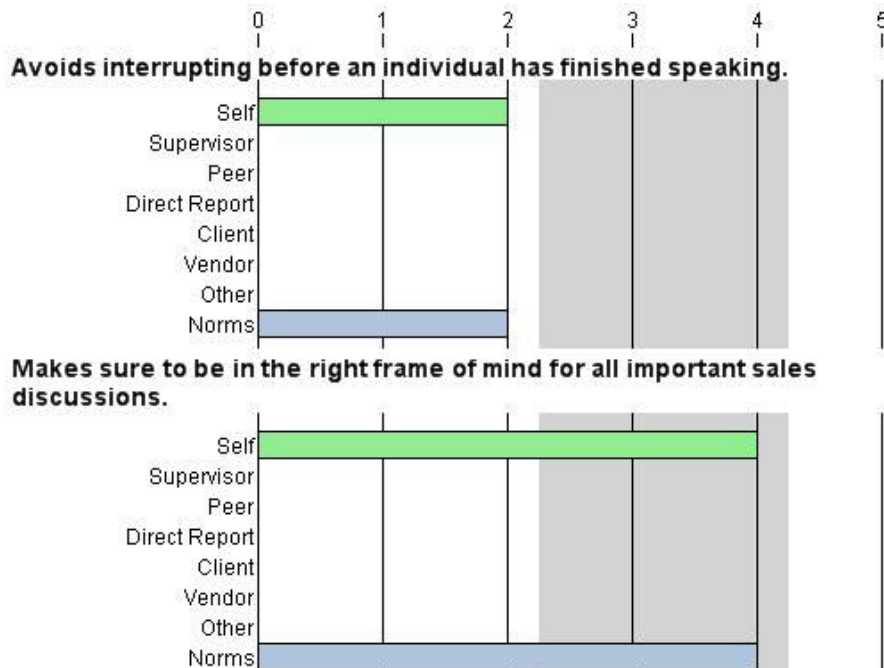
Response ratings predominantly in the ones and twos ("almost never" and "occasionally") suggest that you do not always fully appreciate what prospects or customers communicate, and that you miss important components of the overall message. You are also prone to being easily distracted and jump into conversations before the sender has finished speaking.

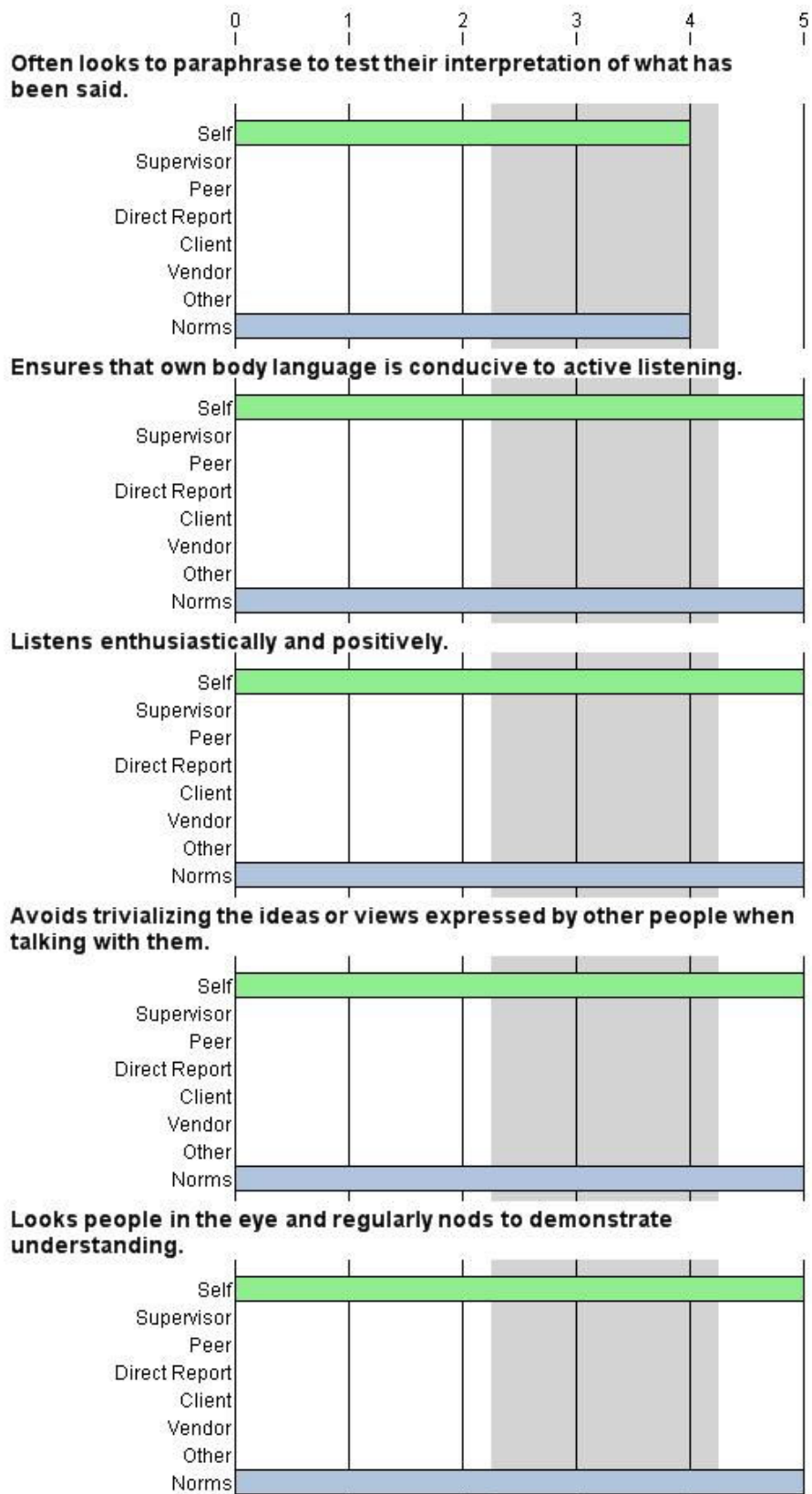
A low scorer is more likely to find communications frustrating or even confusing. Sometimes it's the fault of the sales prospect or customer, but it is more likely to arise as a result of poor listening, giving insufficient time and focus to hearing the full message, and letting the mind wander to other things (or supposedly greater priorities and tasks).

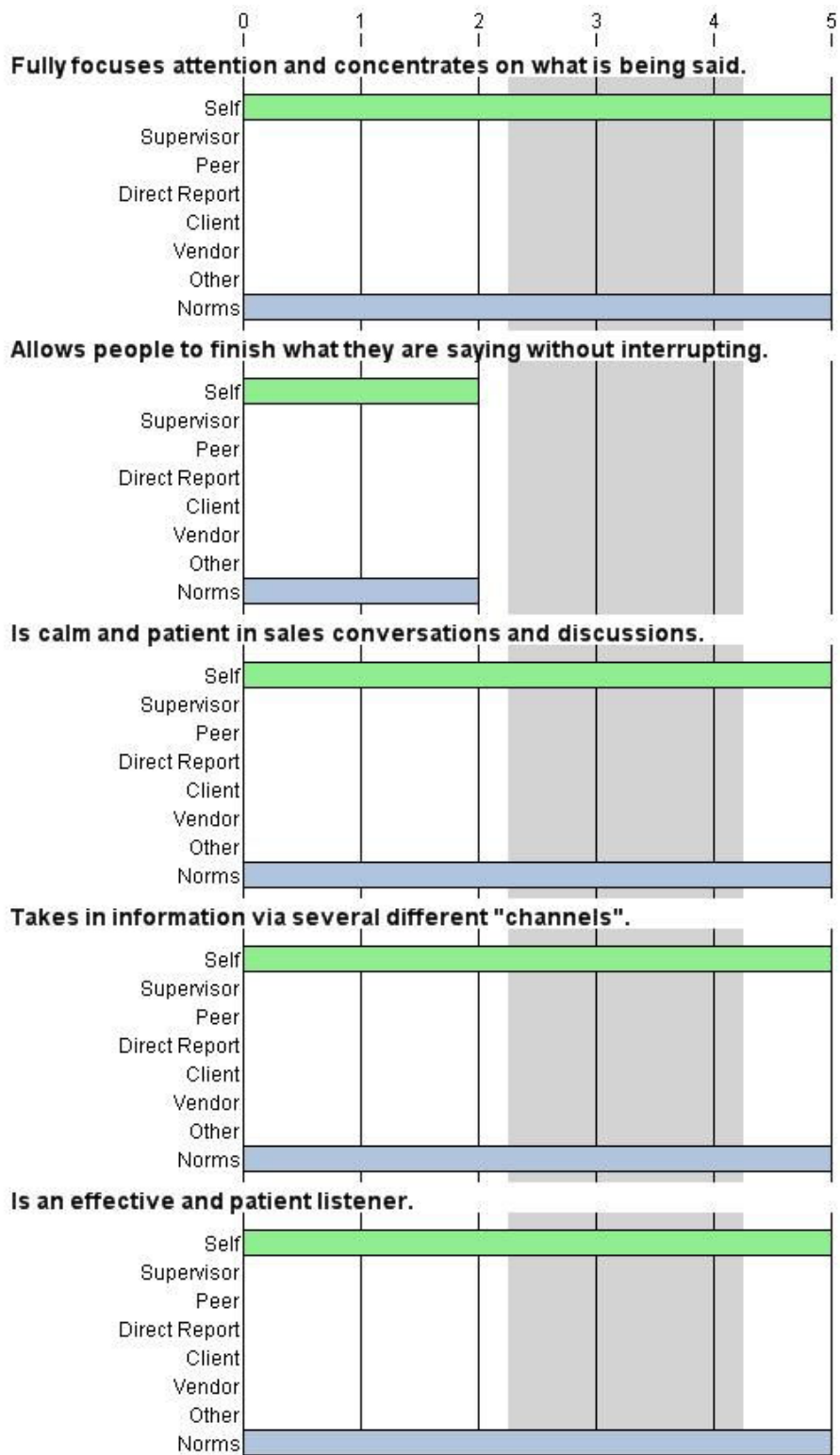
### HIGH (greater than 3.5)

Response ratings predominantly in the fours and fives ("very frequently" and "almost always") suggest that you are an attentive listener and effective at appreciating the tenor of most communications in whatever form they take. You concentrate genuinely and focus well on what customers or sales prospects say to you and maintain a calm and patient demeanor to let clients get their message across without interruption.

High scorers tend to be highly appreciative and attentive listeners who do as much as possible to hear and appreciate the sender's full message. High scorers are the people customers and prospective clients seek out when they need feedback or insight on important or complex issues.







**Active-Listening Skills** looks at how well you listen to, and successfully "process" what a sales prospect or customer is saying both (verbal and non-verbal) before you respond. It asks the question: "How attentive or empathetic are you in ensuring that you've fully understood the customer's entire communication?"

### **Recommendations for Overall Improvement**

Low scorers need to speak less and listen more. To do this, they need to be in an area where they are able to listen easily and focus. They must not interrupt the speaker or allow their mind to wander. Most of all, they need to listen for and hear the whole message being communicated, without "jumping" in too soon.

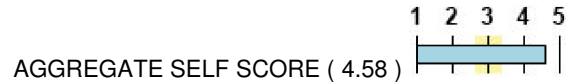
### **Ways to Strengthen or Improve Active Listening Skills**

- At regular points in any conversation, nod or show in other ways that you have understood what a sales contact is saying.
- Maintain as much direct eye contact as you can, and show genuine and focused interest in what the speaker is saying. Avoid becoming physically or mentally distracted.
- Try to smile at people more often, and be as friendly and sincere as you can when they are talking to you.
- Make a strong effort to put yourself in the other person's position to imagine what they might be feeling or where they might be coming from.



# COMMUNICATION SKILLS

Communication Skills looks at the extent to which you listen, respond and provide genuine feedback to your contacts in order to strengthen all your sales relationships. It asks the question: "How effectively are you at maintaining open and honest dialogue with people in your network in order to establish efficient communication channels?"



## Interpretation

### LOW (less than 2.75)

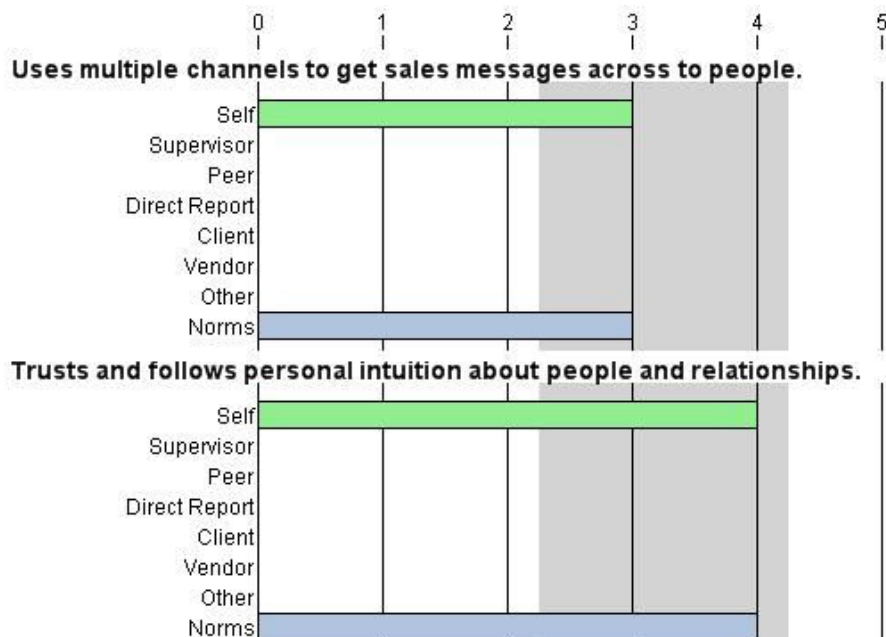
Response ratings predominantly in the ones and twos ("almost never" and "occasionally") suggest that you do not always listen effectively to sales contacts or communicate with your network contacts in ways that will help build deeper relationships with them. You are likely to keep to yourself too much, often leaving you with missed sales opportunities.

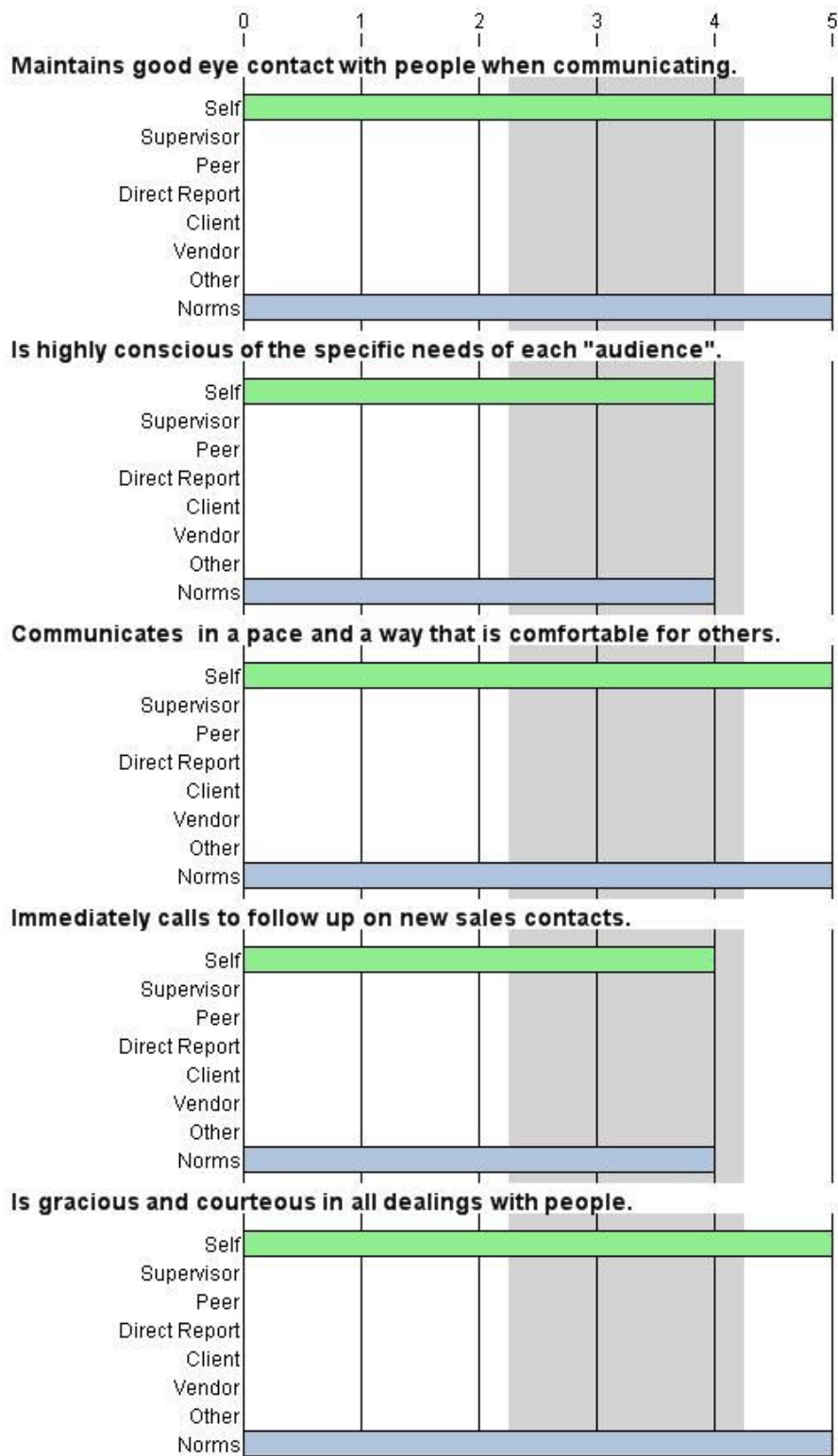
A low scorer is more likely to be a "disconnected information island" in a sales network. Such a person generally fails to nurture and deepen relationships and might have to work much harder to acquire a larger number of contacts to make up for the ones they lose.

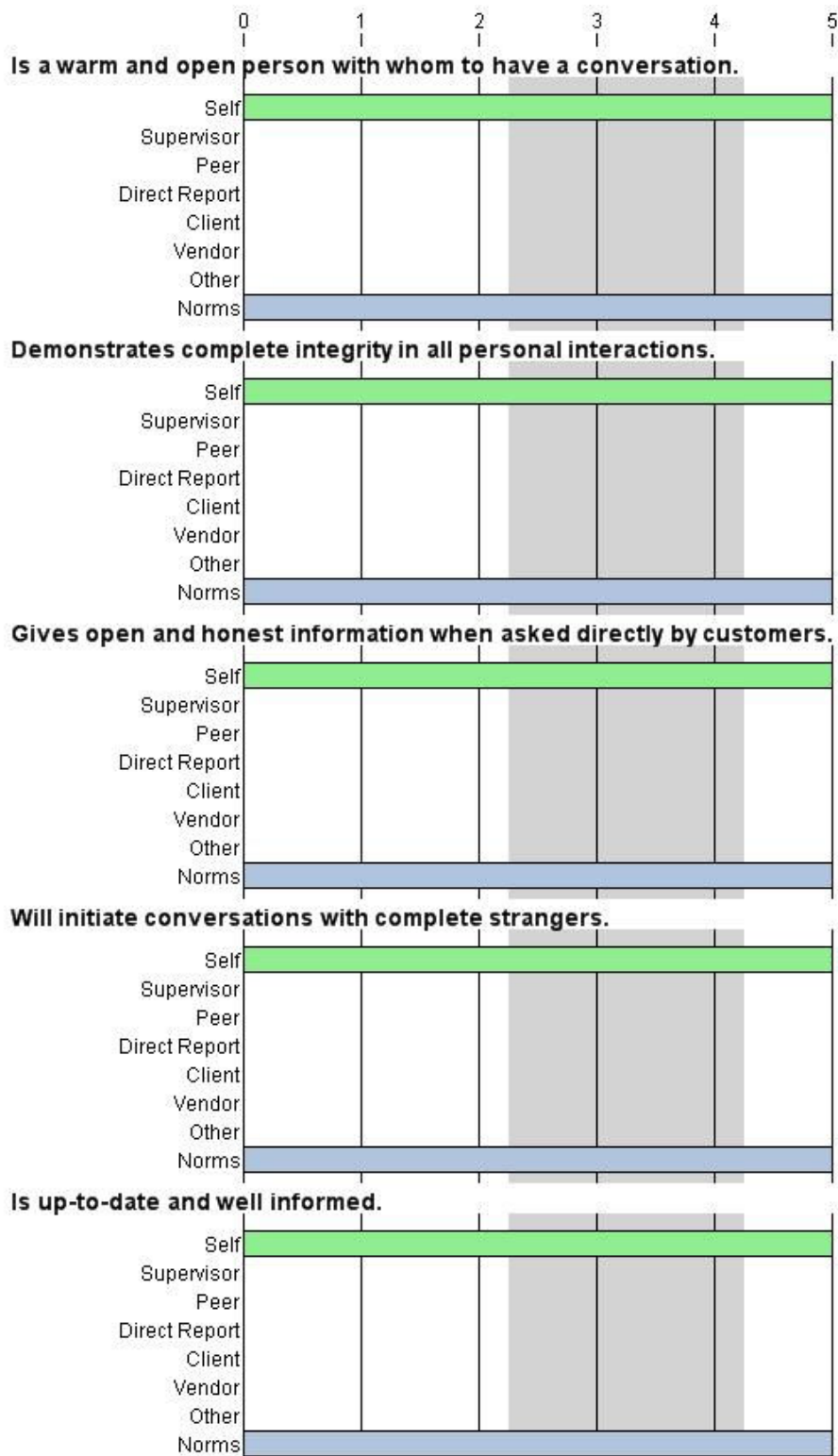
### HIGH (greater than 3.5)

Response ratings predominantly in the fours and fives ("very frequently" and "almost always") suggest that you appreciate the value of carefully listening to and "reading" the needs of your contacts. You also understand that regular and varied communication over time considerably helps build strong and successful customer relationships.

A high scorer tends to enjoy being a contact or potential customer communication "hub," and is generally seen as a well connected person. He or she is therefore both a useful data resource and a good "first port of call" for sales contacts to share their ideas or the challenges they face. High scorers are able to offer solutions to their customers' problems.







**Communication Skills** looks at the extent to which you listen, respond and provide genuine feedback to your contacts in order to strengthen all your sales relationships. It asks the question: "How effectively are you at maintaining open and honest dialogue with people in your network in order to establish efficient communication channels?"

### **Recommendations for Overall Improvement**

Low scorers should spend as much time as they can collecting useful data, information, and news and then carefully assess to whom it might be useful or interesting. Such information should be offered regularly and graciously to sales contacts as a way of opening up general communication channels and building relationships. It can also be used when initiating relationships with new contacts and relative strangers.

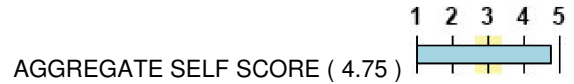
### **Ways to Strengthen or Improve Communication Skills**

- Keep files and folders for useful articles, ideas, news stories, clippings, and other data you read or see that you think will be interesting to others or worthy of follow up to help your sales effort.
- Who might benefit from your product, information, or services? Who will find it interesting and welcome contact? Use the excuse to talk and learn more about your contact to deepen your relationship.
- Start to think about the different prospects or customer audiences with whom you have to communicate or interact. Develop a list of variations in approach and content that you should have at the ready.
- Develop a series of sales presentation scripts that you can deliver flawlessly and with total confidence in a range of different situations.



# RELATIONSHIP NURTURING ABILITY

**Relationship-Nurturing Ability** looks at the extent to which you sincerely and enthusiastically invest your time and effort into building and growing your relationships with your sales contacts. It asks the question: "How well do you nurture your relationships with your contacts and prospective customers to develop high levels of warmth, empathy, and mutual trust?"



## Interpretation

### LOW (less than 2.75)

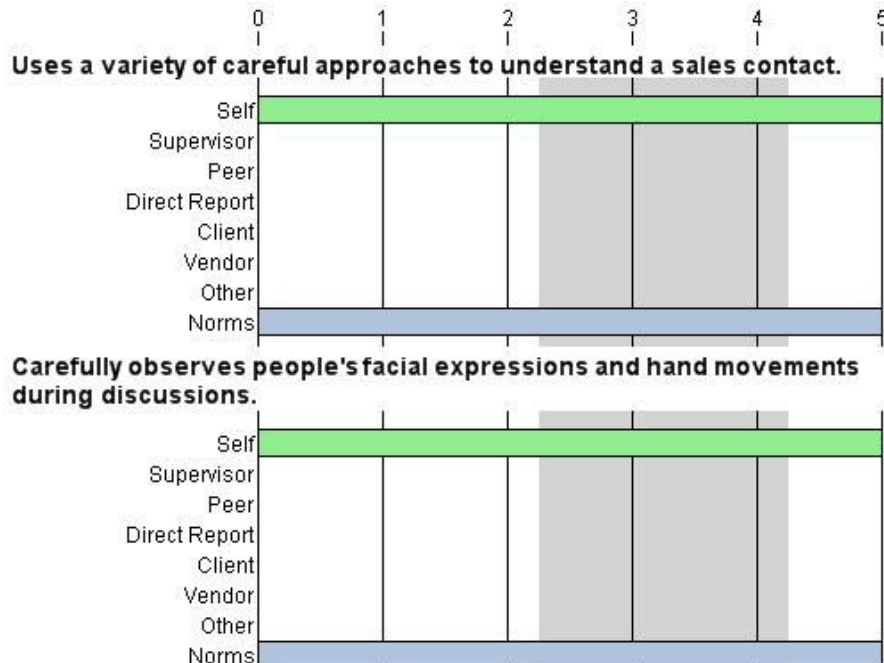
Response ratings predominantly in the ones and twos ("almost never" and "occasionally") suggest that you are less concerned with or even "blind" to the needs of specific sales prospects and customers you meet. You might also be overly transactional in your dealings with people, thinking more about your own needs rather than those of other people.

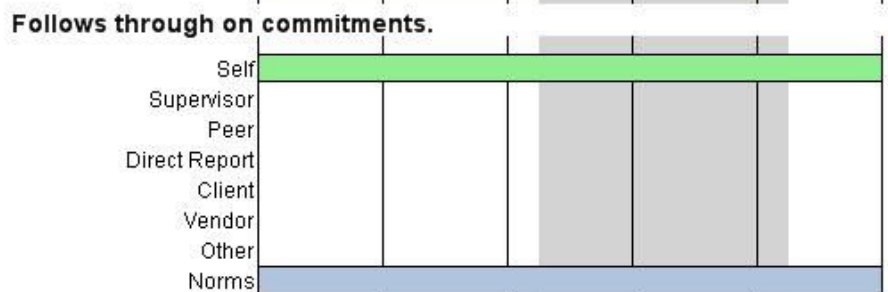
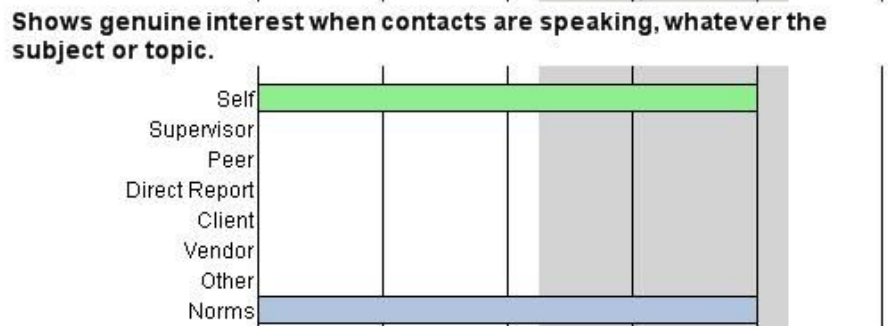
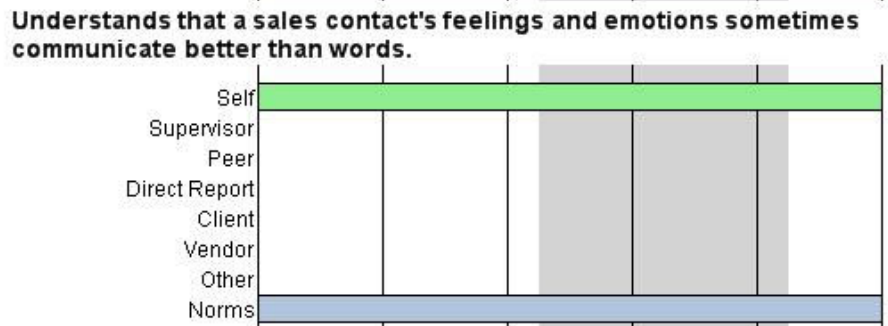
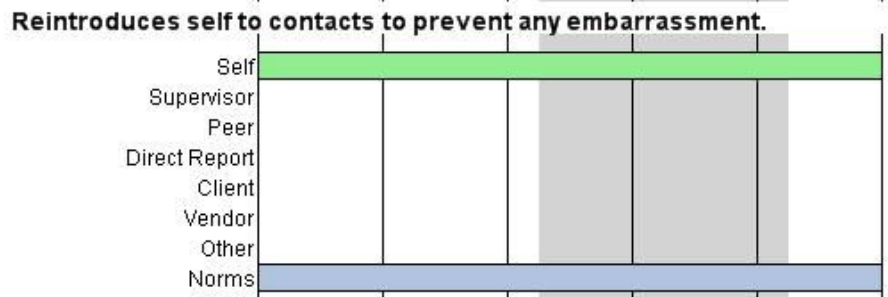
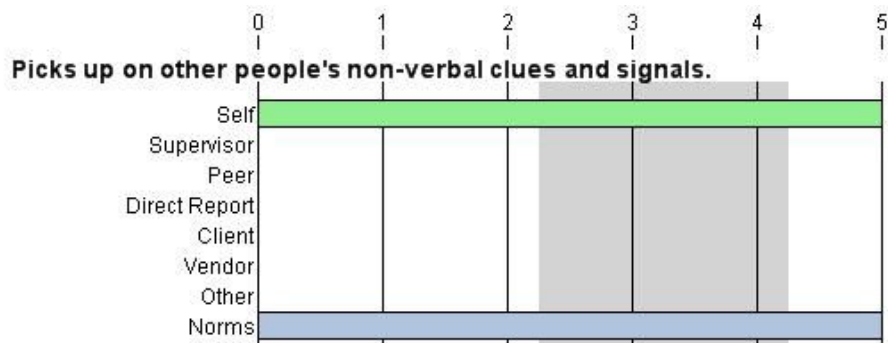
A low scorer tends to have only brief sales conversations and meetings and is prone to focus only on what are perceived to be significant or important points of discussion (ignoring small talk or minor social exchange). Low scorers often forget people's names and sometimes fail to recall details from past conversations.

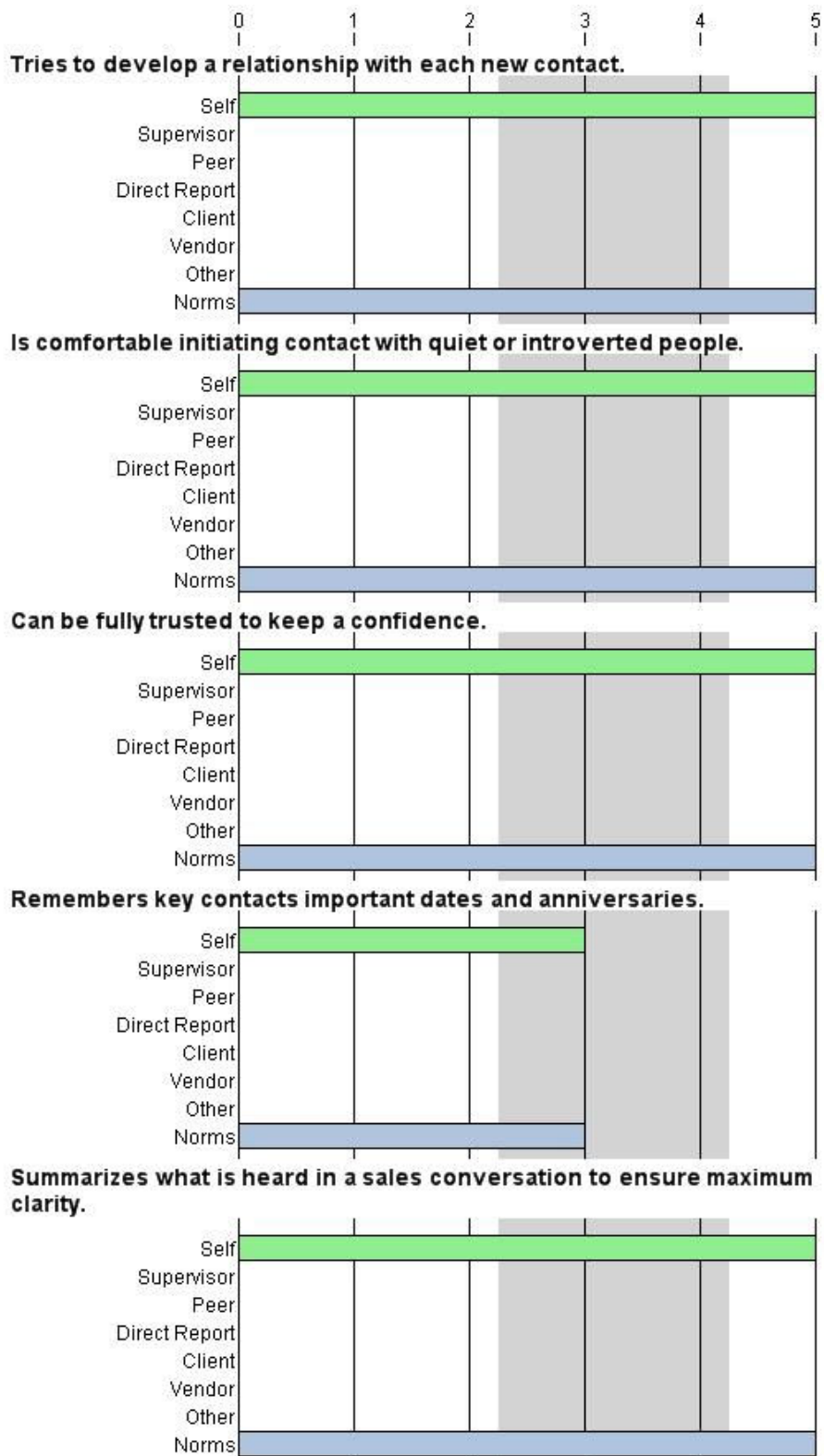
### HIGH (greater than 3.5)

Response ratings predominantly in the fours and fives ("very frequently" and "almost always") suggest that you are committed to creating a warm and enabling climate in which customers feel positive and valued when they come into contact with you. This means that you almost instinctively put yourself in other people's "shoes" to better understand their needs and aspirations.

A high scorer is more likely to quickly build empathy in an interaction and learn minor details about the person that can be used in future conversations. Such people give much of themselves to others without ever feeling that they have to balance how much is given versus how much is received.







**Relationship-Nurturing Ability** looks at the extent to which you sincerely and enthusiastically invest your time and effort into building and growing your relationships with your sales contacts. It asks the question: "How well do you nurture your relationships with your contacts and prospective customers to develop high levels of warmth, empathy, and mutual trust?"

### **Recommendations for Overall Improvement**

Low scorers need to spend more time thinking about the values, goals, and concerns of their sales contacts. Having done this, they should look for ways to be supportive by offering ideas, suggestions, and general advice. Such support should be genuine and warmly offered with good eye contact. Try hard to remember details and personal facts from prior conversations.

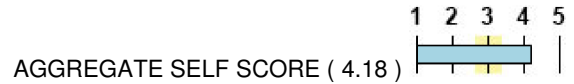
### **Ways to Strengthen or Improve Relationship Nurturing Ability**

- Try to be as positive and sincere as possible in all your conversations with your sales contacts.
- Be sensitive to people's feelings or emotions, as well as their words.
- Try to develop as much trust as you can, and make sure that you meet any commitments that you make to customers.
- Make sure that your deeds always match your words when you make statements about what you intend to do after a discussion or meeting with a sales contact.
- Before you meet with a sales prospect, think about what his or her goals and concerns might be regarding what you are offering, and how the individual will react. Then have a plan to respond to any objections or issues that are raised.



# EXCEEDING CUSTOMER EXPECTATIONS SKILLS

Exceeding Customer Expectations Skills looks at the extent to which the individual has their "environmental radar" tuned to the economy, competitors, the market, and customers to guide their day-to-day actions. It asks the question: "How well do you listen to external sources of information and work across functions, departments, and teams in order to provide service excellence to your customers?"



## Interpretation

### LOW (less than 2.75)

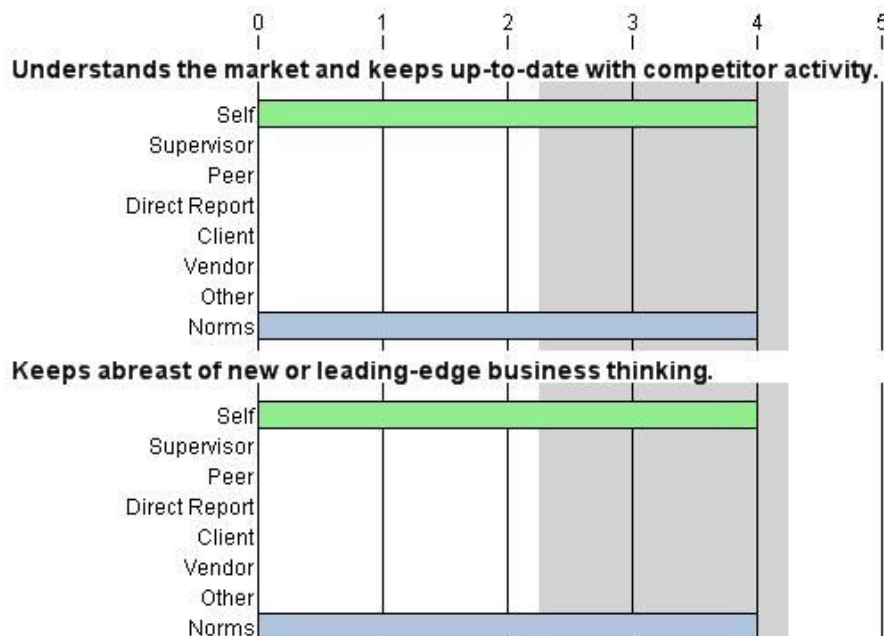
Response ratings predominantly in the ones and twos ("almost never" and "occasionally") suggest mean that you spend little or no time tuning in to the external commercial environment or the changing needs or demands of customers. Any external business information you have is likely to be limited or out of date because you are not keeping up.

Low scorers are more likely to face market surprises because they do not have well-developed networks of sources for information about changes to the economy, competitors, or customer needs. Their decisions are not based on a sound, up-to-date external market contexts or reasonable knowledge of what is happening that is important to the customer.

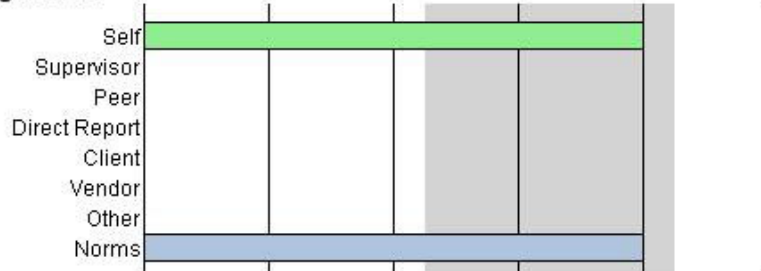
### HIGH (greater than 3.5)

Response ratings predominantly in the fours and fives ("very frequently" and "almost always") are likely to mean that you maintain an active interest in what is happening as far as your customers are concerned and in the external commercial world in general. This will include keeping up to date with what is happening in the economy, with competitor initiatives, and on the shifting needs of different types of customers.

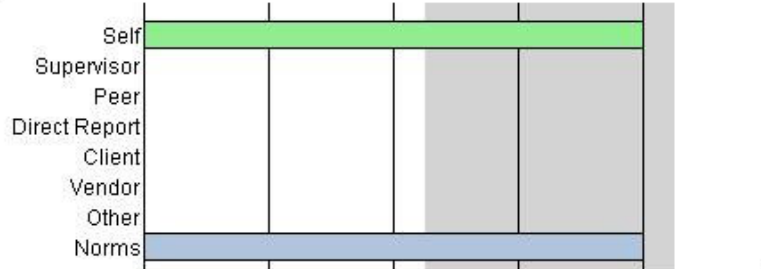
A high scorer is likely to invest a considerable amount of time and energy in developing effective sources of information both inside and outside their organization. High scorers value and nurture relationships with a wide variety of individuals and groups in different functions and businesses. This is done by building a strong contact network and maintaining a healthy, inquisitive interest in the commercial world at large.



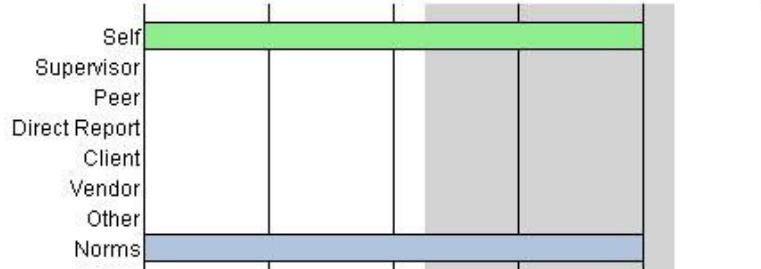
0 1 2 3 4 5  
**Has in-depth understanding about all key stakeholder groups and their changing needs.**



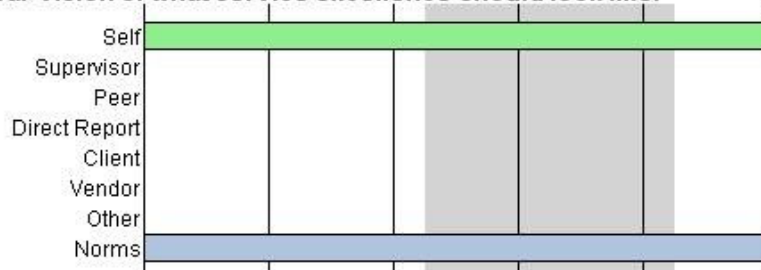
**Provides clear guidance to customers about what to expect and how best to get it.**



**Continually improves processes to meet and exceed customer expectations.**

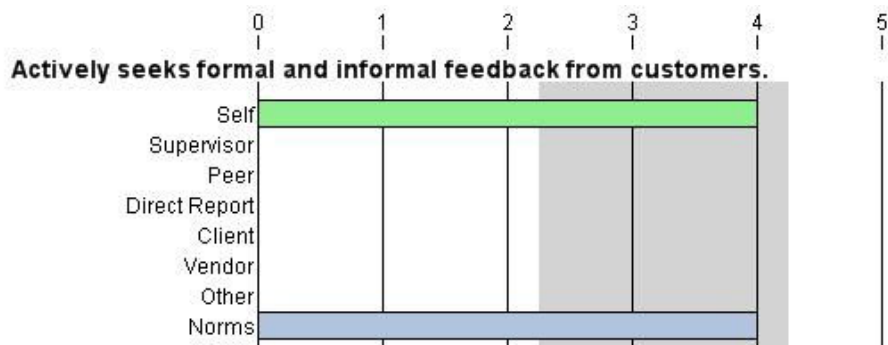


**Has a clear vision of what service excellence should look like.**

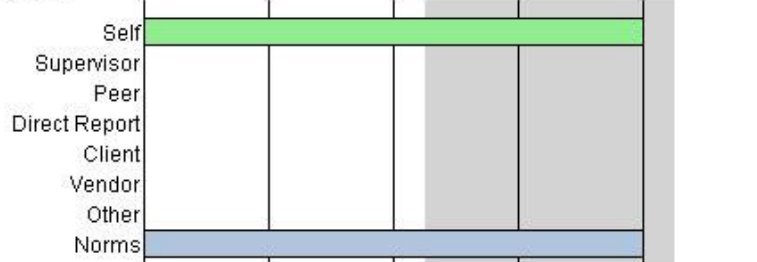


**Compares process performance and results with best-in-class external organizations.**

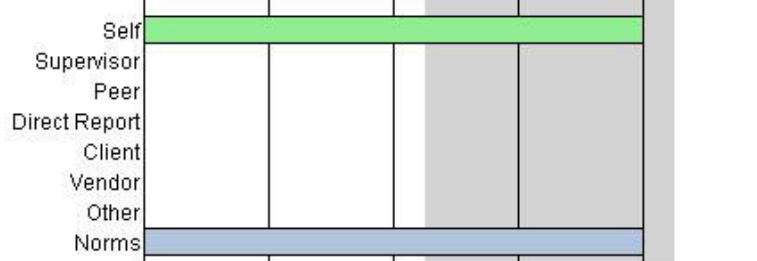




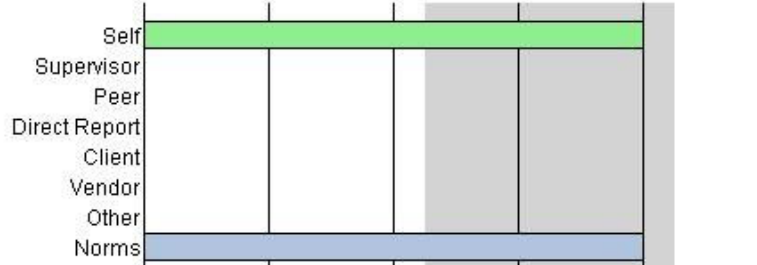
**Systematically collects customer comments and categorizes them for later analysis.**



**Tries to improve processes by carefully listening to customers.**



**Actively seeks to exceed standards for achieving future excellence in customer service.**



**Clearly understands where technology can play an important role in improving the sales value proposition.**



**Exceeding Customer Expectations Skills** looks at the extent to which the individual has their "environmental radar" tuned to the economy, competitors, the market, and customers to guide their day-to-day actions. It asks the question: "How well do you listen to external sources of information and work across functions, departments, and teams in order to provide service excellence to your customers?"

### **Recommendations for Overall Improvement**

Low scorers need to spend more time talking about the industry in general with colleagues from other functions and departments and use this experience to start nurturing useful contacts inside and outside the business. This might include similar or competitive service organizations, suppliers, and other intermediary businesses. Learn to steer these conversations toward what people think about the direction in the economy, trends in competitor activity and shifts in consumer attitudes or expectations so you can better inform and serve your customers.

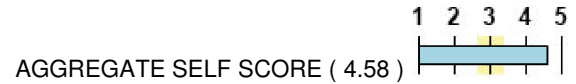
### **Ways to Strengthen or Improve Exceeding Customer Expectations**

- Read more widely and regularly to keep up to date about market trends and what is going on in best practice enterprises and other innovative industries and sectors.
- Take a greater interest in customer feedback, and actively communicate with customers so you know the strengths and weaknesses of what they are being offered and how things can be improved.
- Identify one key process in your work area that could be improved by technology, and develop a plan to describe how this might be brought about.
- Engage in some external process benchmarking to test whether or not a targeted performance area is at a sufficiently competitive level for customer needs.



# DRIVE AND PERSISTANCE SKILLS

Drive and Persistence Skills looks at the extent to which your sales contact relationship-building efforts remain constant and relentless through obstacles and time. It asks the question: "With how much tenacity do you develop your personal sales network and drive in order to achieve better outcomes through people?"



## Interpretation

### LOW (less than 2.75)

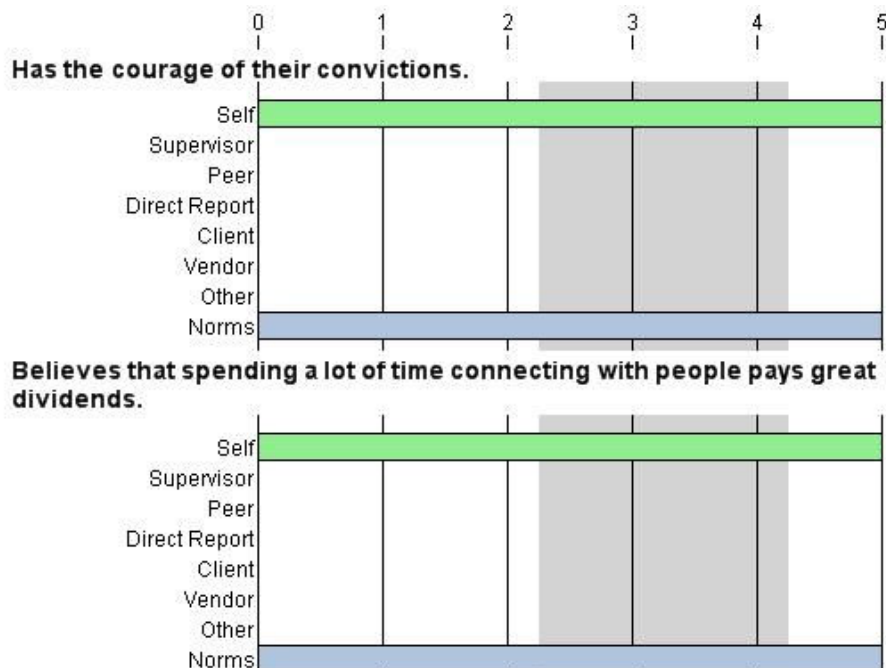
Response ratings predominantly in the ones and twos ("almost never" and "occasionally") suggest that you often become distracted or overly affected by obstacles and difficulties that arise when you are trying to build your customer base. Selling and general prospecting efforts are more likely to be conducted at random, or spontaneously, and followed through with inadequate passion or energy.

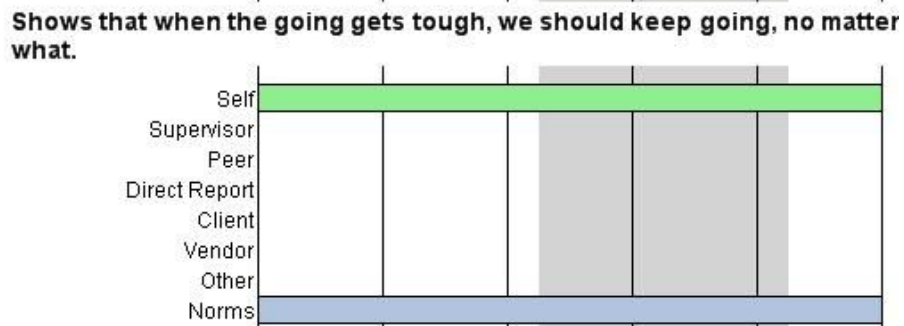
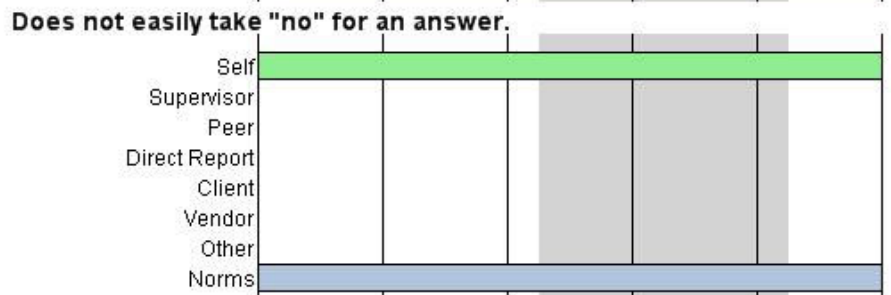
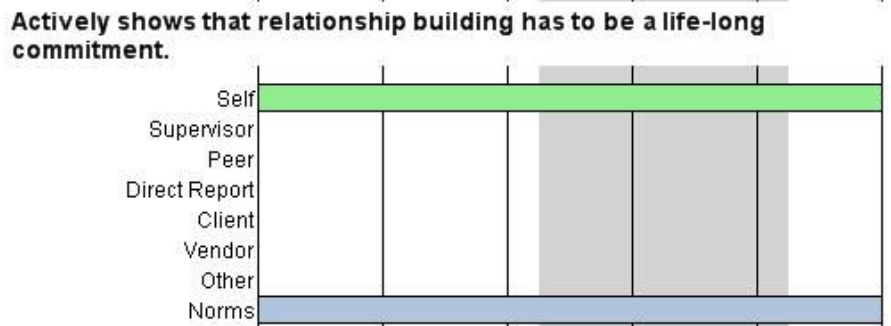
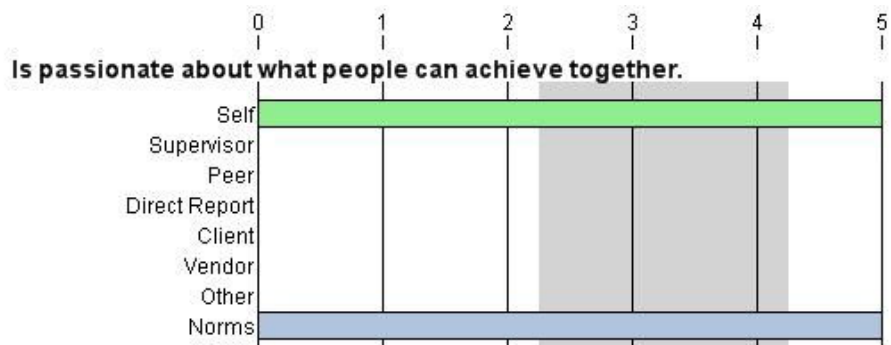
A low scorer will tend to have only a limited commitment to achieving better results through people and all too often prefers to take on difficult tasks or projects alone. Such people are more likely to lose faith in their own ability to achieve some of their sales tasks or goals and occasionally let their customers down or fail to deliver on a promise or commitment.

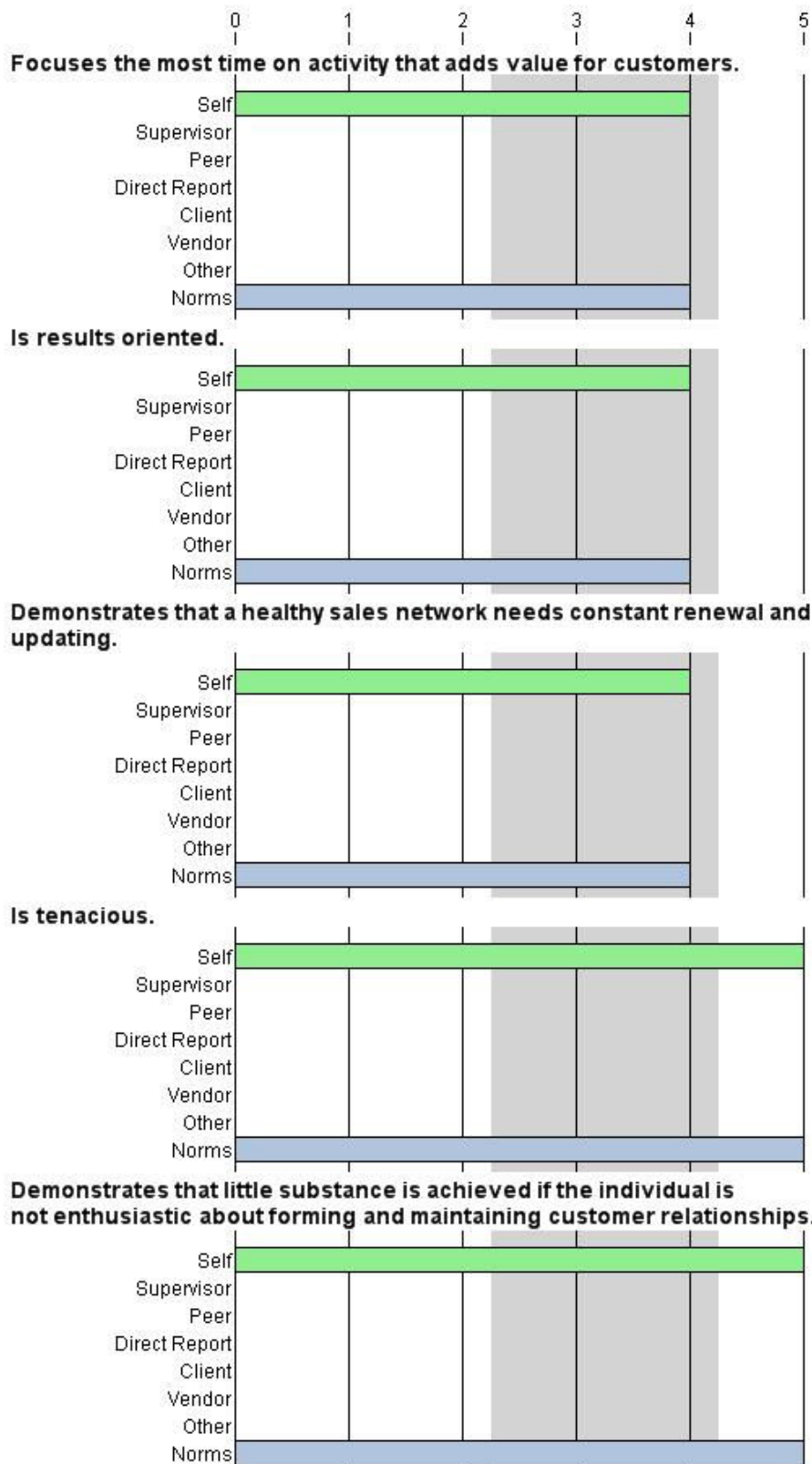
### HIGH (greater than 3.5)

Response ratings predominantly in the fours and fives ("very frequently" and "almost always") suggest that you push strongly toward your sales relationship-building goals or aspirations and to try "jump over" or avoid any obstacles you encounter. You are also likely to have high levels of self-motivation or internal drive and often act as a role model for others.

A high scorer tends to be naturally enthusiastic about his or her customer relationships and often goes out of his or her way to find opportunities to involve people in goals or challenges (other people's and their own). Such people are more likely to take their sales commitments seriously and work hard to achieve results in order to help all their customers become successful over the long term.







**Drive and Persistence Skills** looks at the extent to which your sales contact relationship-building efforts remain constant and relentless through obstacles and time. It asks the question: "With how much tenacity do you develop your personal sales network and drive in order to achieve better outcomes through people?"

### **Recommendations for Overall Improvement**

Low scorers need to think carefully about the whole sales cycle as it relates to each customer and make sure they are relentless in putting in as much effort and resources as it takes to fully meet and even exceed their promises. They also need to demonstrate hard work, determination, and tenacity at all times.

### **Ways to Strengthen or Improve Drive and Persistence**

- Even in the face of obstacles, remain committed by sticking to your sales prospecting plans.
- Celebrate your successes, rather than worry about your failures.
- Make a careful note of commitments that you make and priorities that are important to your customers, and do everything you can to meet their expectations
- When good sales opportunities arise, think about the resources that you will need and the people who might be able to help you. Take steps to organize these at the earliest possible opportunity and gain commitment when you need someone's help.
- Expect an occasional "no sale" or rejection. Get into the habit of asking your prospective customer what else you could have done to close the deal, and see if they can recommend anyone else who might be interested in your product or service.



# THE 10/10 REPORT

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## Top 10 Strengths

### Drive and Persistence Skills

84 .Demonstrates that little substance is achieved if the individual is not enthusiastic about forming and maintaining customer relationships.	5.00
83 .Is tenacious.	5.00
78 .Shows that when the going gets tough, we should keep going, no matter what.	5.00
77 .Does not easily take "no" for an answer.	5.00
76 .Actively shows that relationship building has to be a life-long commitment.	5.00
75 .Is passionate about what people can achieve together.	5.00
74 .Believes that spending a lot of time connecting with people pays great dividends.	5.00
73 .Has the courage of their convictions.	5.00

### Exceeding Customer Expectations Skills

72 .Clearly understands where technology can play an important role in improving the sales value proposition.	5.00
66 .Has a clear vision of what service excellence should look like.	5.00

## Top 10 Development Needs

### Exceeding Customer Expectations Skills

67 .Compares process performance and results with best-in-class external organizations.	0.00
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### Organizational Skills

15 .Makes a list of things to do each day.	1.00
17 .Checks names off a daily sales contact list when the call has been made.	1.00
20 .Systematically organizes and files business cards.	2.00

### Active-Listening Skills

25 .Avoids interrupting before an individual has finished speaking.	2.00
33 .Allows people to finish what they are saying without interrupting.	2.00

### Organizational Skills

13 .Uses a formal daily or weekly system to call or follow up with people.	3.00
24 .Is highly organized.	3.00

### Communication Skills

37 .Uses multiple channels to get sales messages across to people.	3.00
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### Relationship-Nurturing Ability

59 .Remembers key contacts important dates and anniversaries.	3.00
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# COURSE AND READING SUGGESTIONS

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The following are general reading and course suggestions that may help you to better understand the two categories in which your scores were the lowest and to assist you in writing your development plan.

## Organizational Skills

Organizational Skills looks at how well you use organizational and prioritization systems to efficiently and successfully sell to your sales contacts or prospects. It asks the question: "How effectively do you organize yourself and the information you gather about people to whom you intend to sell in order to maximize your chances of success?"

### Course Suggestion

- Thinking/Planning Ahead
- Planning Methods/Approaches
- Scheduling Skills
- Prioritization Skills
- Time Management

### Other Suggestion

- If you feel comfortable doing so, talk to your direct supervisor/manager or a training and development specialist about personal training, coaching, and specific projects, and other possible support they may be able to offer to improve your skills.

### Reading Suggestion

- Make Your Connections Count : The Six-Step System to Build Your Meganetwork. Melissa Giovagnoli
- First Things First. Stephen Covey and Rebecca Merrill: Simon and Schuster
- 30 Minutes to Improve Your Networking Skills. Hilton Catt and Patricia Scudamore
- The Art of Doing Nothing. Veronique Cienne and Erica Lennard: Clarkson Potter

## Exceeding Customer Expectations Skills

Exceeding Customer Expectations Skills looks at the extent to which the individual has an "environmental radar" tuned to the economy, competitors, the market, and customers to guide their day-to-day actions. It asks the question: "How well do you listen to external sources of information and work across functions, departments, and teams to help offer sales service excellence to your customers?"

### Course Suggestion

- Effective Customer Service
- Total Quality Management
- Benchmarking
- Networking and Relationship Building
- Supplier Partnering
- Managing External Stakeholders

### Other Suggestion

- If you feel comfortable doing so, talk to your direct supervisor/manager or a training and development specialist about personal training, coaching, and specific projects, and other possible support they may be able to offer to improve your skills.

### Reading Suggestion

- Service Wisdom. Ron Zemke and Chip Bell: Lakewood Books
- Customer Driven Quality. Richard Whitely
- The Sales Bible. Jeffrey H. Gitomer: William Morrow and Co.
- Moments of Truth. Jan Carlzon: Harper & Row
- The Only Thing that Matters. Karl Albrecht: Harper Collins
- A Passion for Excellence. Tom Peter and Nancy Austin: Fontana
- Customers First. Denis Walker: Gower Publishing



# DEVELOPMENT PLAN

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Use the space below to write out your personal development plan for the next 12 months based on your results. Draw upon the general improvement actions in relevant areas of the report, and ideas that are suggested in the attached coaching tips.

**Compares process performance and results with best-in-class external organizations.**  
**Action to Take:**

Score: 0.00

**Makes a list of things to do each day.**  
**Action to Take:**

Score: 1.00

**Checks names off a daily sales contact list when the call has been made.**  
**Action to Take:**

Score: 1.00

**Systematically organizes and files business cards.**  
**Action to Take:**

Score: 2.00

**Avoids interrupting before an individual has finished speaking.**  
**Action to Take:**

Score: 2.00

## Exceeding Customer Expectations

**Compares process performance and results with best-in-class external organizations.**

Even in circumstances where external benchmarking is widely and regularly practiced, the focus is often only to look at “input” processes or those processes that achieve an internal benefit or outcome. It is therefore important not to forget that ultimate process performance results also need to be measured if for no other reason than to make sure that all the internal improvement effort has been worthwhile.

Ideally, the results that an organization manages to achieve will be compared to best-in-class enterprises. This ensures that there is no complacency about achievements where they are not as good as they might be. If the organization wants to be the best, we must ensure that our efforts are truly competitive by engaging in this kind of benchmarking effort at a number of different levels. In many cases, it is the salespeople (who are most closely in touch with customer needs) who will drive this effort.

Consider the following steps to help improve your overall effectiveness:

1. As process improvement or change activity is implemented, start to evaluate end results and outcomes that are being achieved (e.g., faster service, better prices, greater market share, lower rates of complaint, customer defections, etc.). Use this information to assess where to apply benchmarking comparisons with other external organizations.
2. For each relevant process for your team or organization, look for the external organizations that seem to achieve best-in-class results or the best performance for the type of enterprise or industry, etc.
3. Compare your personal or team results to those of the best-in-class enterprises and assess the gap (if any) and the reasons why differences may exist.
4. Develop open relationships with these external best-in-class enterprises to ensure that comparisons are fair and that any change targets that you set are realistic and appropriate.
5. Don't forget to reciprocate your best process performance outcomes to other non-competitive organizations to ensure that the relationships grow and develop.
6. In the final analysis, make sure that you ask your customers who they think performs the best and why (and take steps to do something about it when it is a competitor).

## Organizational Skills

### Makes a list of things to do each day.

You wouldn't go on a journey without a map, and you shouldn't start a day without a map of where you want to go—or would you? You need to be more proactive—in charge of events and people—rather than reactive—controlled by events and people. You will never escape the reactivity trap unless you create a structure for controlling, or at least influencing, the never-ending flow of events and people in your world. A “To Do” list is a good place to start when trying to create structure.

In creating such a list, bear these things in mind:

**1.** Putting everything down in a list is a beginning, not an end. There is no point in simply having an undifferentiated “laundry list” of things to do without having some way of structuring those things. Things expand to fill the amount of list available, if you give them the chance.

Even a real laundry list should involve some measure of organization: synthetics here, whites here, towels and heavier fabrics here, stained garments here, and so on. Consider what will happen to your real laundry if you do not have a system—disaster, of course.

**2.** Make sure that you don't confuse a daily list with a weekly, monthly, or yearly one. Consider the consequences of what will happen if everything on your daily list doesn't get done today: Are the consequences catastrophic, or only mildly annoying? Some things can slide and might even benefit from some “benign neglect.”

**3.** Be aware that everyone wants a piece of your time, but that their priorities might not be the same as yours. Are you getting dumped with their problems? Is your good-natured desire to help out compromising your ability to get done what you need to get done? Have you mastered the art of the diplomatic “no” or “not right now”? Even your customers respect this when you explain your reasons.

**4.** Each time you achieve something, reward yourself. The rewards can be simple: get up and go for a walk, get a drink, indulge in some non-work-focused chat with a colleague, play a computer game, have lunch. Use a big, bold pen-stroke to cross off another goal achieved. Keep rewards healthy and reasonably quick (in other words, don't make them a reason for major procrastination), and you may find that you return to the fray refreshed, ready to knock off another item on the list.

**5.** Be realistic about what you put on your list. Break up big tasks into digestible chunks so that the job doesn't look quite so daunting.

## Organizational Skills

### Checks off their daily sales contact list as it is completed.

If you commit to spending a few minutes making calls each day, it is an extremely pleasant feeling to check off each person you were supposed to contact that day. It is an achievement and means that your plan is working and you are (hopefully) achieving your goals.

Although there are no specific rules, in general we should make contact with our clients/prospects at least four times per year. Does that sound daunting? Well let's put that into perspective. What constitutes contact? Making contact with people can include a phone call, e-mail, thank-you note, birthday card, holiday card, business letter, sales proposal, or personal visit. It doesn't sound quite so daunting now does it? However, to achieve this, we must be organized and consistent as well as having a good data retrieval system.

Consider the following to improve your effectiveness in this area:

- Allocate at least 30 minutes everyday to call on sales prospects and customers. Decide how much time to allocate to current/past contacts and new/potential contacts.
- It is important to allocate a similar amount of time to contacting our existing contacts as we allocate to prospecting for new contacts. We cannot neglect one or the other and expect our network to grow.
- Having an idea of what it is that prevents you from completing those daily contacts might help you achieve that daily goal:
  - Procrastination.
  - Constant interruptions. Allocate uninterrupted time each day. Networking must take a high priority.
  - Not having the correct stationery available (e.g., birthday cards, thank-you cards, etc.).
  - Too many items on the list for the time allocated. Use the information you gather to re-plan. Be sensible—don't set yourself unachievable goals.
- Carefully determine what should be on your contact list:
  - Today's phone calls
  - Today's thank-you notes
  - Today's birthday cards
  - Other

Don't confuse this list with your daily "To Do" list, which could include other non-contact items. Of course you might incorporate both lists into one "To Do" list.

## Organizational Skills

### **Systematically orders and files business cards that are offered.**

After a few year years of selling, you are likely to have hundreds if not thousands of business or calling cards. What should you do with all those business cards? Perhaps you should put the details in a database and then throw them away? Well, yes, add the contact and relevant information to your database by all means, but you need to keep the card. Why? Because a business card is a visual mind jogger. The design, color, and in some cases a photograph of the contact will jog your memory. In addition, any hand-written notes (which might not be included on a database) can be easily read.

A suggested system for filing these cards is as follows:

- As you collect business or calling cards at various functions, jot down a few notes on the back—like the date you met, where you met, as well as your contacts and their skills or occupation (if it isn't obvious on the front of the card). Also, include relevant information that the person reveals to you during the course of your conversation, as well as any promises you have made to that person.
- When you get back to the office, don't forget to remove the collected business cards from your pocket and add the contact to your database as soon as you can while it is fresh in your mind.
- Add your new contacts to your follow-up or "To Do" list and take action within 72 hours.
- Once you have completed your initial follow-up, file the business cards in a card box or business card file. Which one you use is your choice and whether you file them by contact name or company name is also up to you. You might consider filing them by occupation or industry and then by name on a secondary basis. Hence, next time you are looking for some financial advice you could go straight to your financial folder to find the card you are looking for.
- It might not even be necessary to file your calling cards in alphabetical order. You can put your favorite or most reliable and useful sales contacts at the front—people who you know are going to do a good job. As you get to know, keep in touch with, and use various contacts, you can re-evaluate and re-prioritize the cards.
- Clear out the out-of-date or non-productive business cards regularly to make room for those of the new contacts you meet. Create a system that works for you, then work your system.

## Active-Listening Skills

### **Avoids interrupting before the information sender has finished speaking.**

Interruptions are sometimes necessary, and they are sometimes even pleasant. But all too many interruptions are unnecessary, and unpleasant. You should try to ensure that you are involved in as few interruptions as possible, and this also applies to interrupting others as they talk. Here's how to do that:

1. There are substantive interruptions, where we interrupt because we disagree or because we wish to make a point. There are also procedural interruptions, where we interrupt because we weren't sufficiently awake when the speaker was talking, and we might have missed something critical, so we ask them to repeat themselves. This embarrasses and annoys speakers, and it should embarrass and annoy you. Stay awake, and if you must interrupt at some stage, make sure it is for a good reason.
2. Try to suspend judgment on what you are hearing. Try to separate in your mind your opinion of the person and the quality or content of what that person is saying. Would you have the patience to listen to a long-winded, but ultimately correct, opinion from someone you actively dislike? Most of us wouldn't, but we would regret it if we didn't. How about you? To make such a separation is hard work, but such a skill is definitely worth cultivating.
3. If you have a reasonably active mind, the ideas expressed by another person should trigger off a whole range of thoughts: further examples of what the person is talking about, counter-examples, insights connected to what is being talked about, connections with other topics. All of these things might be relevant, but you don't need to express them by interrupting. Make a mental note, or even a written note, while the other person is talking, and make your point when they are finished. Don't be embarrassed to go back over old ground and previous topics: you've heard the other person out, and now they are in your debt for your patience—the least they can do is hear you out.
4. Don't imagine that silence means consent—it doesn't. Merely because you are listening to someone doesn't mean that you are agreeing with him or her. Make sure that you understand that, and definitely make sure that the other person understands the point. You can make this happen by stating your disagreement after they have finished talking, and you can make this happen while they are talking by unambiguous body language: look attentive, but if you dislike what you hear, don't send out contradictory non-verbal signals, like rapid nodding and smiling—don't look stern and aggressive, but look restrained and neutral.
5. Use the time while the other person is talking to frame good responses. We sometimes regret speaking too soon because the thoughts we express are too spontaneous—they are too ill formed, disorganized, and lacking in argumentative power and consistency. Better to remain silent and look a fool than to speak out and remove all doubt. Better still to remain silent and work hard on the words that will show unequivocally just how un-foolish you really are.