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OVERVIEW OF THE CBIM SALESFORCE DEVELOPMENTAL ASSESSMENT PROCESS

Diagnosing a sales force's performance is a complex process. The Center for Business and Industrial Marketing (CBIM) has evaluated 20 of the most popular assessment tools. Most assess sales people's psychological traits. These are only one of several critical components that determine sales force effectiveness.

Perhaps most critical is the selling context: what is the sales task? Facilitating repurchase? Hunting for new opportunities within existing accounts? Prospecting? Consulting with prospects to create innovative processes and solutions? Most sales forces are called upon to perform more than one of these tasks. And so a critical first step in the CBIM sales force assessment process is to work with clients to create profiles of the sales jobs they want to have performed.

Here are the steps in the CBIM assessment process:

- Define the sales tasks and the ideal sales person profiles

- Document the key elements of the sales strategies

- Identify the sales processes and systems

- Customize on-line surveys for sales people and sales managers

- Communicate with sales people and sales managers to assure cooperation

- Manage the administration of the on-line surveys

- Analyze survey responses:

  - Conduct a pipeline analysis: evaluate the quality of the pipeline on 19 dimensions

  - Sales Person Assessment: identify strengths to build on and development opportunities to help sales people execute the client's strategies more effectively.

  - Sales Manager Assessment: identify strengths to build on and development opportunities to help sales managers create a more effective sales force.

- Meet with the sales management team to review findings and recommendations for ways to address overall sales force issues and to discuss how to use the assessment results in mentoring sessions with sales people.

The balance of this document highlights the dimensions our assessments evaluate and kinds of findings our assessment projects produce.

## ECONOMIC VALUE OF ADDRESSING THE DEVELOPMENTAL COACHING ISSUES

All of our assessment analyses and reports are presented in an economic context. What is the compelling reason for addressing the skills, behaviors, weaknesses, and issues uncovered by the assessment process? The reason is that addressing these factors translate into improved financial performance.

Based on the data collected from the sales people and sales managers in the assessment process, we calculate the economic impact you can achieve by addressing your key developmental coaching opportunities, your systems and process issues, etc.. The economic value has two dimensions: Improvement in the quality of your sales pipeline, and increases in revenues from sales.

In this sample case the organization as a whole had six major issues, which, when addressed would improve the pipeline by \$9 million and increase sales by \$19 million.

Here are the six issues, and the economic value of addressing each:

DEVELOPMENTAL COACHING OPPORTUNITY AREA	POTENTIAL INCREASE IN PIPELINE	IN REVENUES
Ineffective prospecting	\$5,200,000	
Ineffective qualifying	\$3,875,000	
Ineffective selling system		\$6,022,000
Lack of accountability		\$5,784,000
Discounting		\$4,252,000
Need for approval and buy cycle		\$3,000,000
<b>TOTAL IMPACT</b>	<b>\$9,075,000</b>	<b>\$19,058,000</b>

The following sections present a sample of the analyses that support management's addressing these performance issues.

## SALES MANAGEMENT CAN ALMOST ALWAYS SPEND MORE TIME COACHING, MOTIVATING, AND HOLDING ACCOUNTABLE

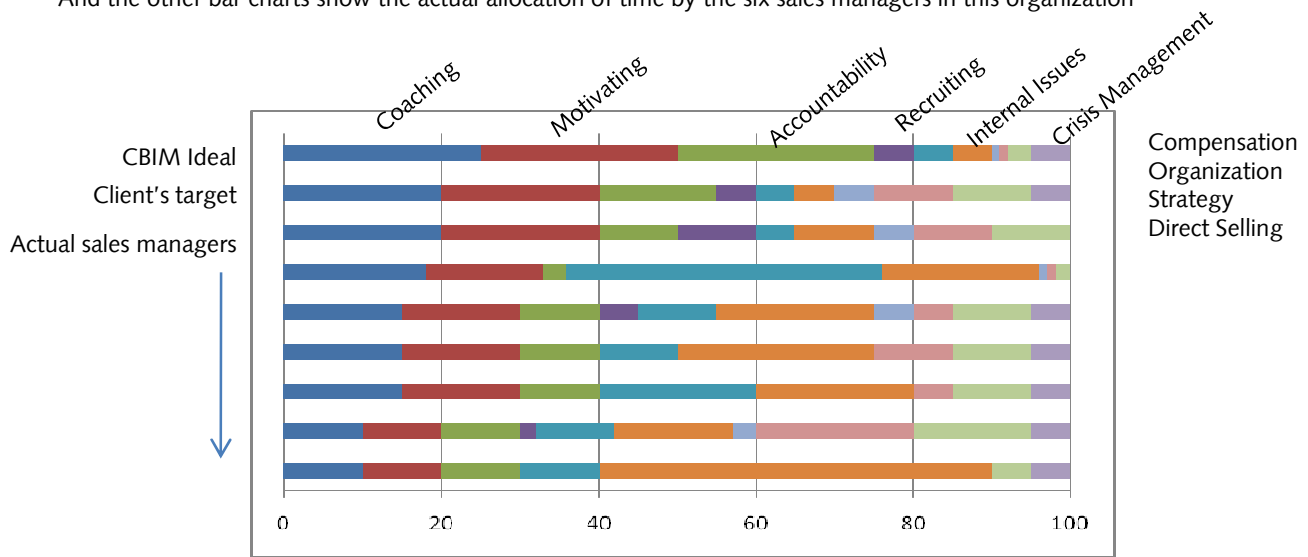
CBIM research shows that best practice is for sales management to spend 75% of its time on three performance enhancing activities:

Coaching	25%
Motivating	25%
Holding their people accountable	25%

The top bar chart below shows the best practice sales force's distribution of how sales management allocates time to six best practice sales management functions.

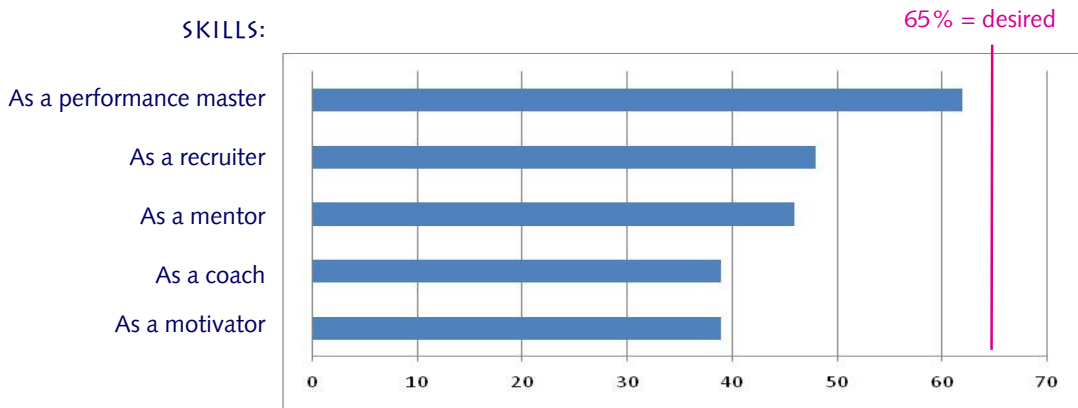
The second bar chart shows how a particular client's management team chose to set targets for their sales managers to allocate time. Note that they added four more sales functions beyond the six best practice activities.

And the other bar charts show the actual allocation of time by the six sales managers in this organization



## SALES MANAGEMENT CAPABILITIES.

In addition to measuring the amount of time sales managers devote to each best practice activity, our assessments determine how well each manager is performing five best practice activities. This chart summarizes the performance of the sales management group as a whole. The actual overview breaks this down by manager.

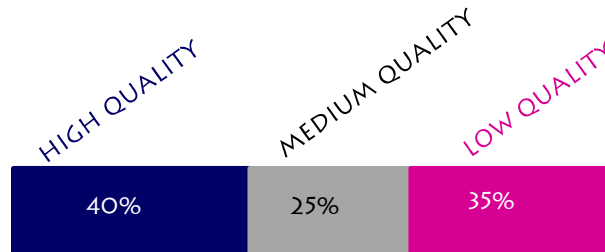


## PIPELINE ANALYSIS

Discussing which prospects to spend time on is one of the most important topics for sales managers to work with their sales people on through the coaching and mentoring processes. The CBIM assessments facilitate this critical aspect of developmental coaching by asking sales people to evaluate a sample of their prospects on 19 specific dimensions.

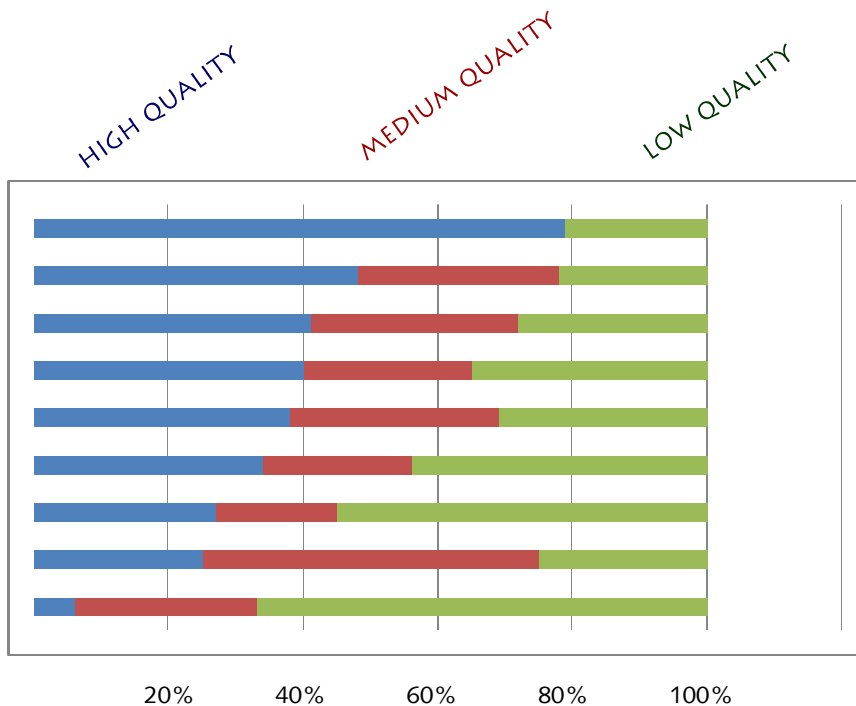
The pipeline evaluation that results helps the sales manager be specific in guiding and supporting their sales people's work.

In this sample overview pipeline analysis over a third of the sales force's pipeline is of low quality. This reflects the very common, human tendency to prospect where it's easiest, rather than where there is the greatest return if key barriers are overcome.



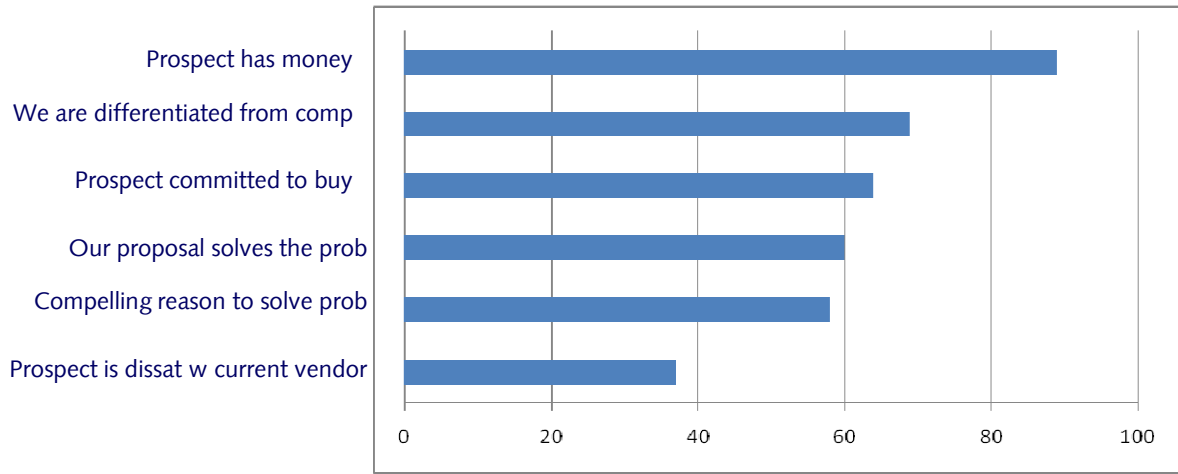
## THE CLIENT'S PIPELINE QUALITY VARIES ACROSS REGIONS

The chart below breaks the overall pipeline down by sales region. Note that even the best region can benefit from improved prospecting.



OF THE 19 QUESTIONS ABOUT PIPELINE QUALITY, SIX HAVE THE HIGHEST IMPACT FOR THIS PARTICULAR CLIENT

6 HIGH IMPACT QUESTIONS



THE COMPLETE LIST OF 19 QUESTIONS ABOUT PIPELINE QUALITY,:

- Quoting decision maker
- Decision upon quoting
- Compelling reason to solve their problem
- Will be profitable
- Prospect is credit worthy
- Developed strong relationship
- Existing clients not impacted
- Differentiated ourselves from the competition
- Compelling reason to buy from us
- Commitment to buy
- Funding exists
- Client knows price range
- Competitive issues handled
- Indicated preference toward us
- Dissatisfied with incumbent vendor
- Decision within 30 days
- Delivery timeframe is appropriate
- No need for competitive quotes
- We have a solution

## SALES PEOPLE'S CLOSER SCORES ARE LOWER THAN HUNTER OR QUALIFIER SCORES

The CBIM assessments evaluate each sales person on eight sets of sales skills that together comprised the sales job.

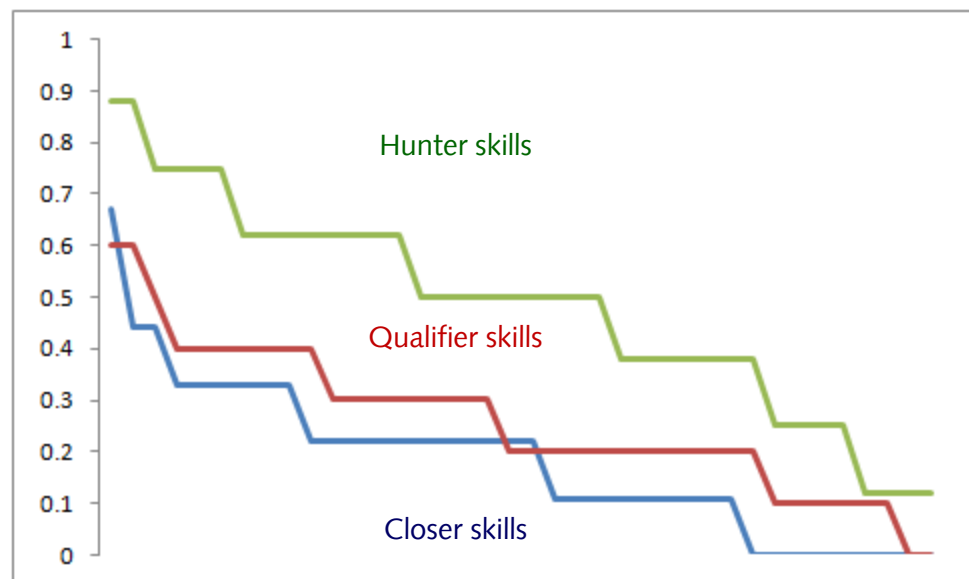
These eight sets of skills are :

- Hunter skills
- Closer skills
- Qualifier skills
- Farmer skills
- Account manager skills
- Intellectual skills
- Ambassador skills
- And what are termed Timid skills (see page 9 for elaboration)

The following pages present the component skills and qualities that the assessment uses to define and measure each of these dimensions of the sales job. And the graphic below illustrates the kind of insight about the organization as a whole that the summarization of assessments can yield.

In this graph each sales person's score (from 0% to 100%) is posted (the x-axis represents the sales people from 1 to 35) and the y axis is each person's score.

Generally, the organization is doing better (but still can improve) in the area of having hunter skills. They need to do a much better job qualifying and closing.



The actual overview report provides the detailed data of how each sales person scored on each aspect of each of the eight sets of sales skills. This provides a comprehensive and specific basis for each sales person to create a development plan (with the support of their managers) that will help him or her improve both skills and results.

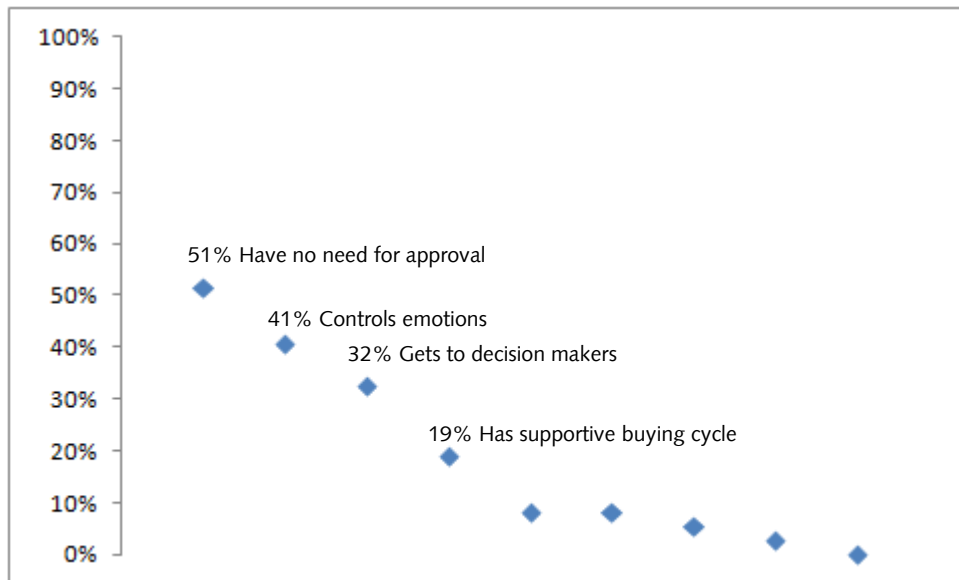
The following page shows a sample of the kinds of analyses contained in the overview.

## PLOT OF % SALES PEOPLE PRACTICING EACH CLOSER SKILL

The actual overview report provides the detailed data of how each sales person scored on each aspect of the eight sets of sales skills. This chart illustrates a summary of how the sales force as a whole scored on the nine components of the closer skill set.

Observe that the low level of closing urgency in this data set is the mirror image of the sales management finding that they do not hold their sales people accountable.

The developmental way of looking at this pair of findings is that the sales team has a dual opportunity—the sales people can develop closing urgency and the sales management can hold them accountable for doing it.



8% Gets prospect to make a decision  
8% Won't make inappropriate quotes  
5% attempts to close  
3% Has closing urgency  
0% Won't accept put offs

## DEFINITIONS OF SALES PERSON CHARACTERISTICS

### HUNTER SKILLS

Prospects consistently  
Gets past gatekeepers  
Gets to decision makers  
Gets to decision makers  
Gets appointments when prospecting  
Receives plenty of introductions  
Will prospect  
Has no need for approval  
Recovers from rejection

### CLOSER SKILLS

Gets prospect to agree to make a decision  
Won't make inappropriate quotes  
Gets to decision makers  
Attempts to close  
Has closing urgency  
Won't accept put offs  
Has supportive buy cycle  
Has no need for approval  
Controls emotions

### QUALIFIER SKILLS

Uncovers actual budget  
Gets to decision makers  
Learns why prospects buy  
Learns how prospects buy  
Does not assume  
Comfortable talking about money  
Has high money tolerance  
Has no need for approval  
Controls emotions  
Has supportive record collection

### FARMER SKILLS

Has closing urgency  
Attempts to close  
Controls emotions  
Won't accept put offs  
Has supportive buy cycle  
Has difficulty recovering from rejection  
Has need for approval  
Won't prospect

### ACCOUNT MANAGER SKILLS

Develops bonding and rapport  
Gets to decision makers  
Uncovers actual budget  
Knows how to handle people  
Effective time management  
Lacks closing urgency  
Has need for approval  
Won't prospect  
Believes—"I should be their friend"  
Inappropriate follow up calls

### INTELLECTUAL SKILLS

Attempts to close  
Uncovers budget  
Gets to decision makers  
Learns why prospects buy  
Learns how prospects buy  
Has at least 10 skills  
Has need for approval  
Has non-supportive buy cycle  
Has self limiting records  
Has money issues  
Has difficulty controlling emotions

### AMBASSADOR SKILLS

Develops bonding and rapport  
Gets referrals and introductions  
Knows how to handle people  
Enjoys selling  
Inappropriate follow up calls  
Wasting time—selling system  
Believes—"I should be their friend"  
Skills limited to first three of this list

### TIMID SALES SKILLS

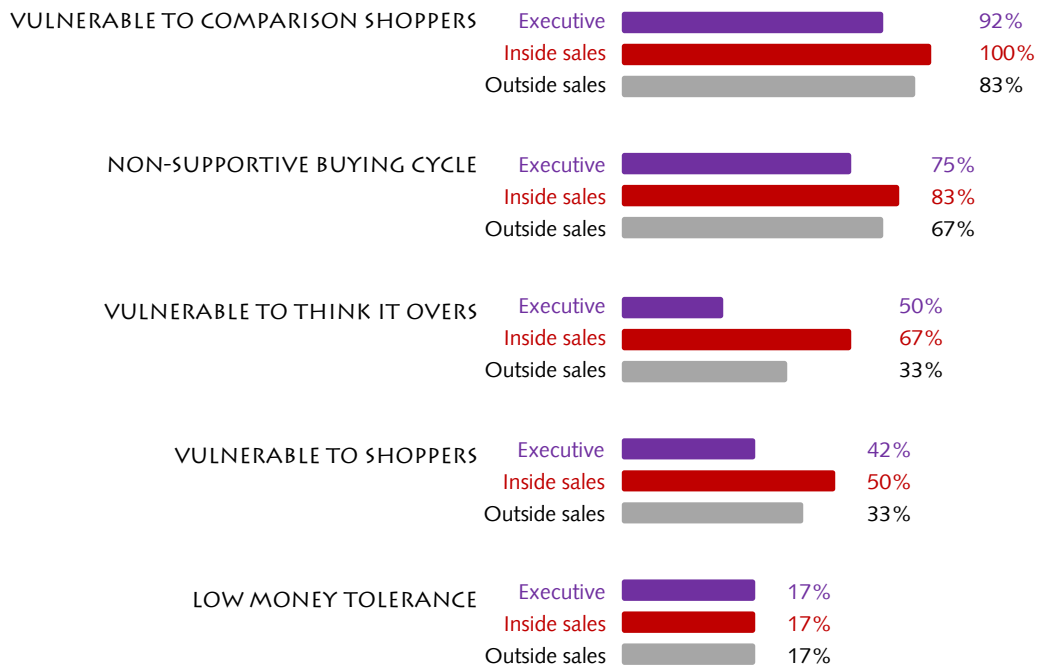
Has low self esteem  
Has need for approval  
Has difficulty recovering from rejection  
Uncomfortable talking about money  
Has outlook problem  
Is not money motivated

## ANALYSIS OF BUY CYCLE ELEMENTS

The overview document discusses several patterns of thinking and behavior that tend to obstruct a sales person's progress and success. One of the unique insights of the assessment is that the way a sales person thinks about buying products and services themselves affects how they sell. That is, if sales people comparison shop themselves, or if they wait and think before buying, they will accept these put offs and delays as natural in their prospects and customers. Five aspects of these non-supportive behaviors and attitudes are:

- Non-supportive buying cycle
- Vulnerable to think it overs
- Vulnerable to comparison shoppers
- Vulnerable to price shoppers
- Low money tolerance (they flinch at their price before the prospect does)

The overview analyzes how each sales person (and logical groupings of sales people) behave and think about these factors:



## THE MAJOR SALES COMPETENCIES

Here are the dimensions of competency, behaviors, and attitudes our assessment evaluates:

	Desire	Commitment	Responsibility
Outlook	Need for Approval	Talking Money	Coping with Rejection

## SUMMARY OF TRAINING NEEDS

We develop a training curriculum for your sales force based on the issues we identified

TRAINING AREA	CORE COMPETENCY	TRAINING MODULE	% GROUP NEEDING THIS TRAINING
Mastery of a more powerful selling system	Discovering why prospects buy	Selling process	100%
Getting prospects to agree to make a decision	Gets commitments and decisions	Selling process	100%
Improve selling skills	Discovering why prospects buy	Selling process	100%
Improve productivity	Consistent effective prospecting	Prospecting	98%
Better closing skills and execution	Gets commitments and decisions	Closing the deal	92%
Fewer inappropriate time wasting decisions	Effective listening and questioning	Hot buttons	92%
Getting stronger appointments	Reaches decision maker	Hot buttons	92%
Eliminate put-offs	Doesn't need approval	Objections	85%
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## A FINAL WORD

CBIM is committed to supporting our clients in realizing the value of developmental coaching. And our assessments are designed to provide sales managers and sales people with the specific feedback and insights to create their own, customized, highly specific development plans.

This document provides a sample of the rich set of information, feedback, and insights that will help your team put the powerful principles and best practices of sales to work for them and improve their sales results.