



Report designed for

**Sally Sample**

# Sales CheckPoint Performance Feedback System™ Management Report

Report Prepared: March 22, 2024

**CONFIDENTIAL**

Survey Completed: August 9, 2022

This report includes responses from:

Salesperson and Sales Manager – Baker, Ramona

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## The Sales CheckPoint

The purpose of the Sales CheckPoint is to identify sales behaviors as viewed by you and your Salesperson, Sally Sample. There are 79 sales behaviors presented as survey items. These 79 items are grouped into 19 Skill Sets which further group into 7 Universal Sales Competencies. Both you and Sally Sample provided your ratings of the sales behaviors on each of the items.

The Skill Sets are grouped into 7 Universal Sales Competencies. When a Salesperson frequently displays certain behaviors which are a part of these Sales Competencies, they are typically identified as effective and successful in sales.

The 7 Universal Sales Competencies and their 19 Skill Sets are listed below.

### 1. Entrepreneurial Approach

- Reflects entrepreneurial attitude
- Time optimization
- Sets effective goals

### 2. Understands the Prospect

- Recognizes buyer behavior
- Understands the purchasing process

### 3. Develops Appropriate Solutions

- Uses feature and benefit solutions
- Knowledge of products

### 4. Prospects Proactively

- Identifies prospects
- Gets appointments

### 5. Manages Selling Process

- Understands client-centric selling
- Establishes rapport
- Identifies prospect's needs
- Counsels prospect

### 6. Closes the Sale

- Explores prospect's options
- Presents ideal solution
- Overcomes objections
- Closes effectively

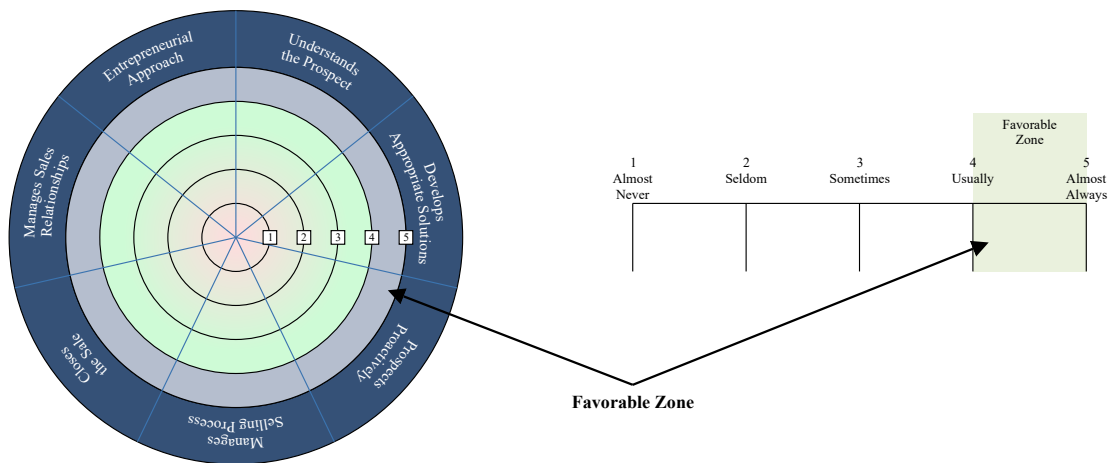
### 7. Manages Sales Relationships

- Secures the relationship
- Develops the relationship

In the 79 Sales CheckPoint survey items the raters chose one of six possible choices. Based on their observations they indicated the percentage of time they felt the Salesperson displayed each behavior. The sixth choice was "No Opportunity," which was selected when the rater had no opportunity to observe the listed behavior and thus could not provide a meaningful response. These six possible responses were:

Response	Description	Percentage of Time
1	Almost Never	0 - 10%
2	Seldom	11 - 39%
3	Sometimes	40 - 60%
4	Usually	61 - 89%
5	Almost Always	90 - 100%
N	No opportunity to observe this behavior	

**Favorable Zone:** The Favorable Zone represents a range of scores (4.0 to 5.0) where a group of experienced Sales Managers and sales trainers expect an effective Salesperson to be rated. It simply suggests that each Skill Set is important to success and that all Salespeople should remain focused on attaining that level of behavior.



## Introduction to the Management Report

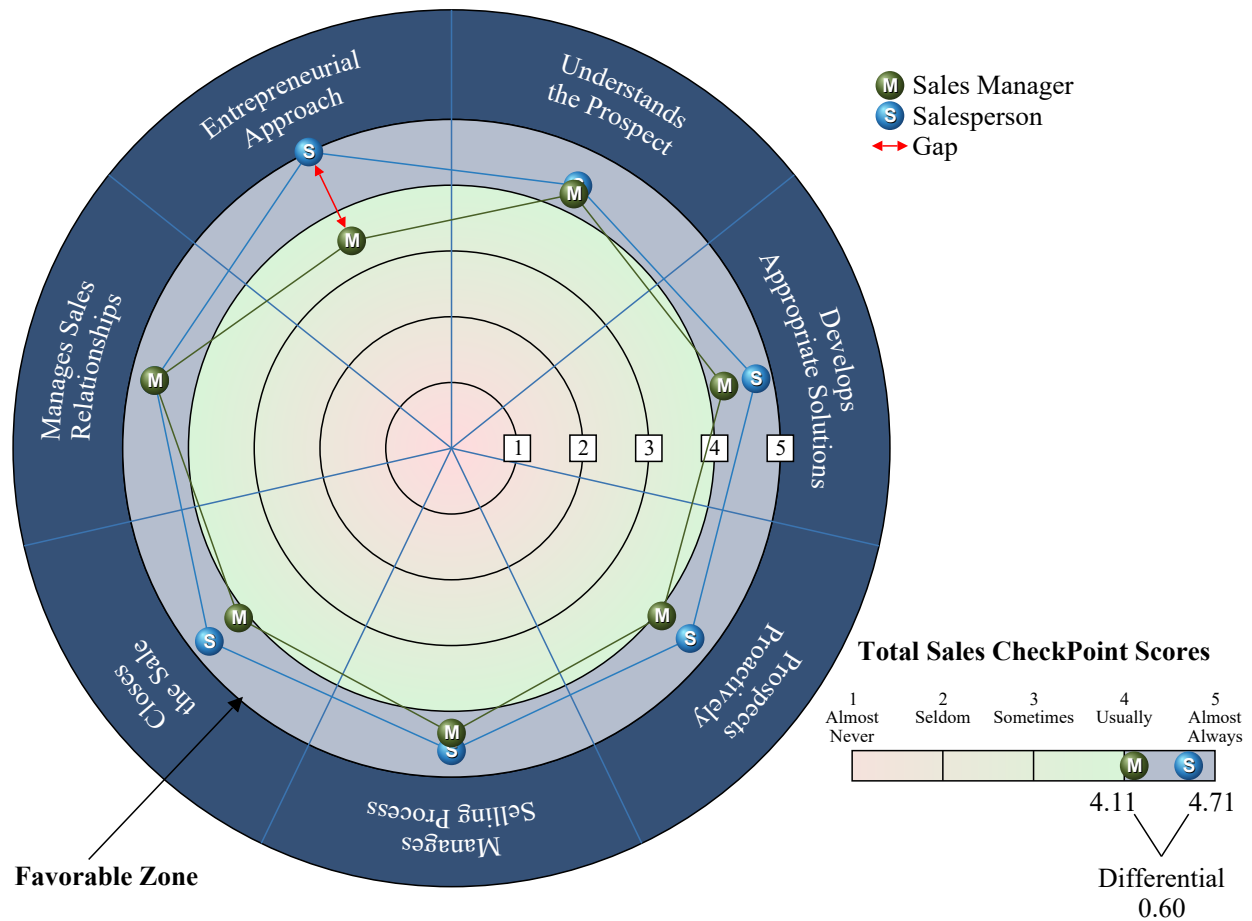
This report summarizes the results of the Sales CheckPoint surveys that you and Sally Sample recently completed. The scores for Sally Sample are presented in graphs and numeric scales on the pages that follow.

Feedback is reported in the following sections:

- **Executive Competency Overview**: Results for the 7 Universal Sales Competencies compare the average scores for both you and Sally Sample and show whether scores fall within or below the Favorable Zone. Also shown are the Total Sales CheckPoint Scores, including the score differential between both of you.
- **Skill Set Summary**: Overview of the 19 Skill Sets as rated by you and Sally Sample. The average ratings are displayed ranked from highest to lowest for both of you. Your ratings are shown in the first group while the ratings from Sally Sample are in the second group. This provides you an overview of the relative strengths or challenges of Sally Sample in these Skill Sets.
- **Critical Skills Alignment Summary**: Overview of the Skill Sets identified as critical by you and Sally Sample.
- **Executive Summary**: Results for the 7 Universal Sales Competencies, comparing the average scores of both you and Sally Sample and pointing out score averages that vary by 1 point or more.
- **Skill Set Analysis**: Results for the 19 Skill Sets, comparing the average scores of both you and Sally Sample, and pointing out score averages that vary by 1.5 points or more, as well as analyzing Critical Skill Sets to establish Talents, areas needing Focus, and areas where a significant gap exists between the scores of you both. (You both chose 6 Critical Skill Sets out of 19. These were considered critically important to the effectiveness of Sally Sample in selling.)
- **Survey Summary of the 79 items**: Results for all 79 survey items, displaying the scores of you and Sally Sample while highlighting the items that fall in a Critical Skill Set.
- **Development Summary Overview**: Describes the strengths and development needs for Sally Sample in the 19 Skill sets.

As you review this material, keep in mind that most people exhibit a range of abilities. No one does everything equally well. Approached as a learning tool, this feedback can be a valuable first step toward increasing the sales effectiveness of Sally Sample.

## Executive Competency Overview

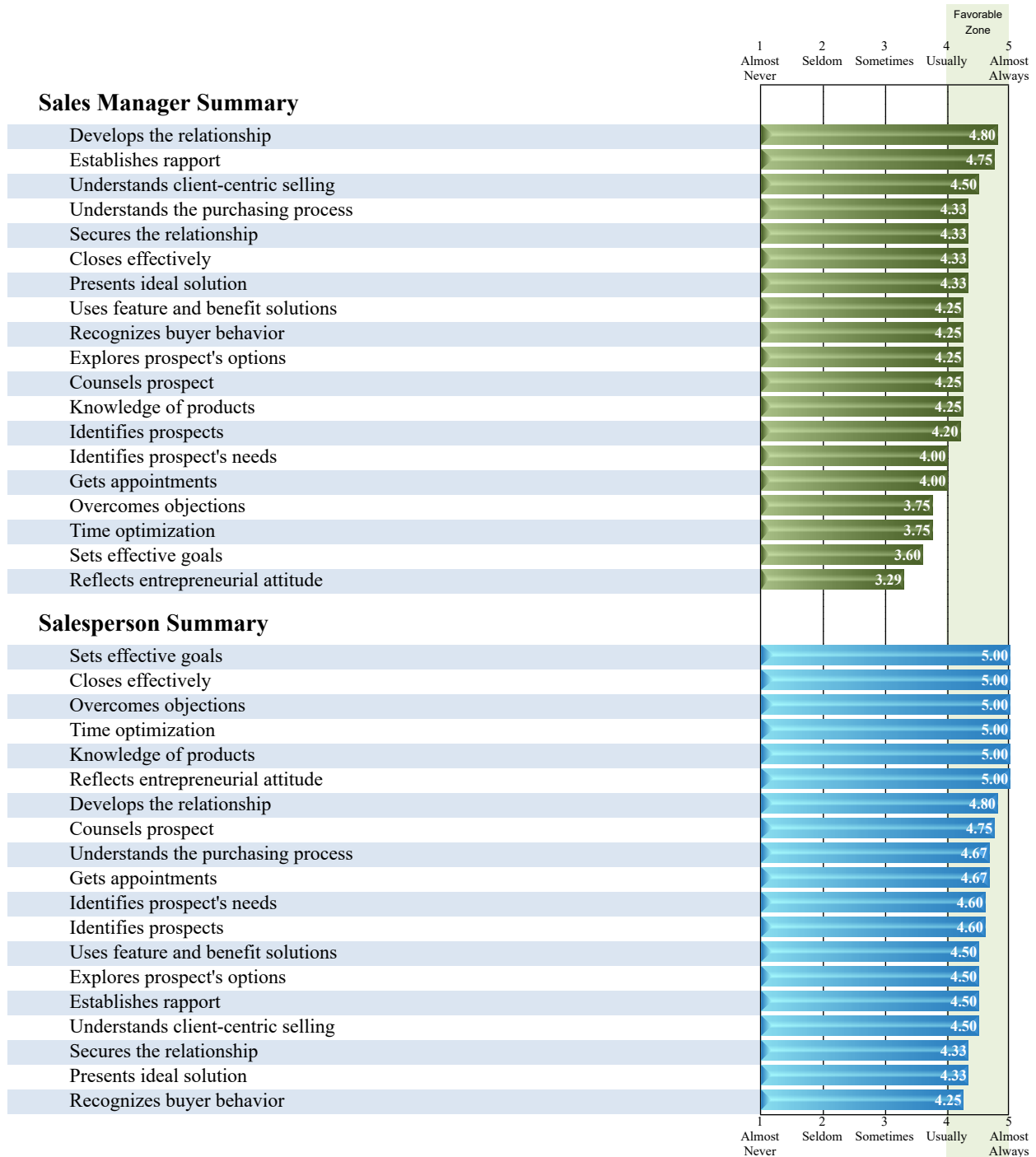


This is an overview of your average ratings compared to the average ratings of Sally Sample for all 7 Competencies. Note particularly where there is a gap of 1 point or greater. This would indicate a significant difference between perceptions and suggests a need for discussions between you and Sally Sample.

Total Sales CheckPoint Scores reported on the smaller horizontal graph present the average score for all 7 Competencies for you and Sally Sample. Again, a gap of 1 or more is a call for discussion and strongly suggests the need for immediate attention.

## Skill Set Summary

The first graph below shows the average ratings for each Skill Set given by you. The average ratings are displayed in ranked order from highest to lowest providing you with your perception of the relative strengths of Sally Sample in these Skill Sets. The second graph below shows the average ratings of each Skill Set from Sally Sample. Again, they are ranked from highest to lowest.



## Critical Skills Alignment Summary

Both you and Sally Sample identified the 6 Skill Sets that you each thought were most critical for success in selling. These Skill Sets are displayed below. Consider that the possible number of Skill Sets selected by both you and Sally Sample can range from 6 to 12. If you both select the same 6 Skill Sets you will have 100% alignment. When you did not agree on any of the Skill Sets as most critical, there is 0% alignment. As the alignment percentage decreases, it becomes even more important for you and Sally Sample to discuss and clarify the most important aspects of the selling process. Unless you have both identified the same behaviors as critical, there will be a real potential for disagreement on where Sally Sample should focus.

### Critical Skills Alignment: 0%

**S** **Reflects entrepreneurial attitude:** Creates a positive climate for producing results. Accepts responsibility and practices high standards both professionally and personally. Works diligently to meet the needs of prospects and clients.

**M** **Time optimization:** Manages time wisely and balances time selling with time servicing clients.

**S** **Recognizes buyer behavior:** Identifies reasons prospects buy products or services and uses this knowledge to enhance sales approach.

**M** **Understands the purchasing process:** Exhibits knowledge of the roles, goals, and processes of purchasing professionals and develops relationships with them.

**S** **Uses feature and benefit solutions:** Develops and offers solutions by communicating product characteristics and identifying how those characteristics will satisfy the prospect's needs.

**M** **Gets appointments:** Develops and implements relevant, compelling, client-centric communications to support efforts of getting meetings with prospects.

**S** **Establishes rapport:** Develops client relationships by building credibility and determining the specific and relevant linkages between salesperson and prospect.

**M** **Identifies prospect's needs:** Uncovers the real needs of prospects to increase the likelihood of making a sale and increasing client satisfaction.

**S** **Counsels prospect:** Counsels prospect to increase the sense of urgency and create discontent with the status quo.

**M** **Presents ideal solution:** Demonstrates an understanding of prospect's needs and desires and uses product expertise to provide viable options for a solution.

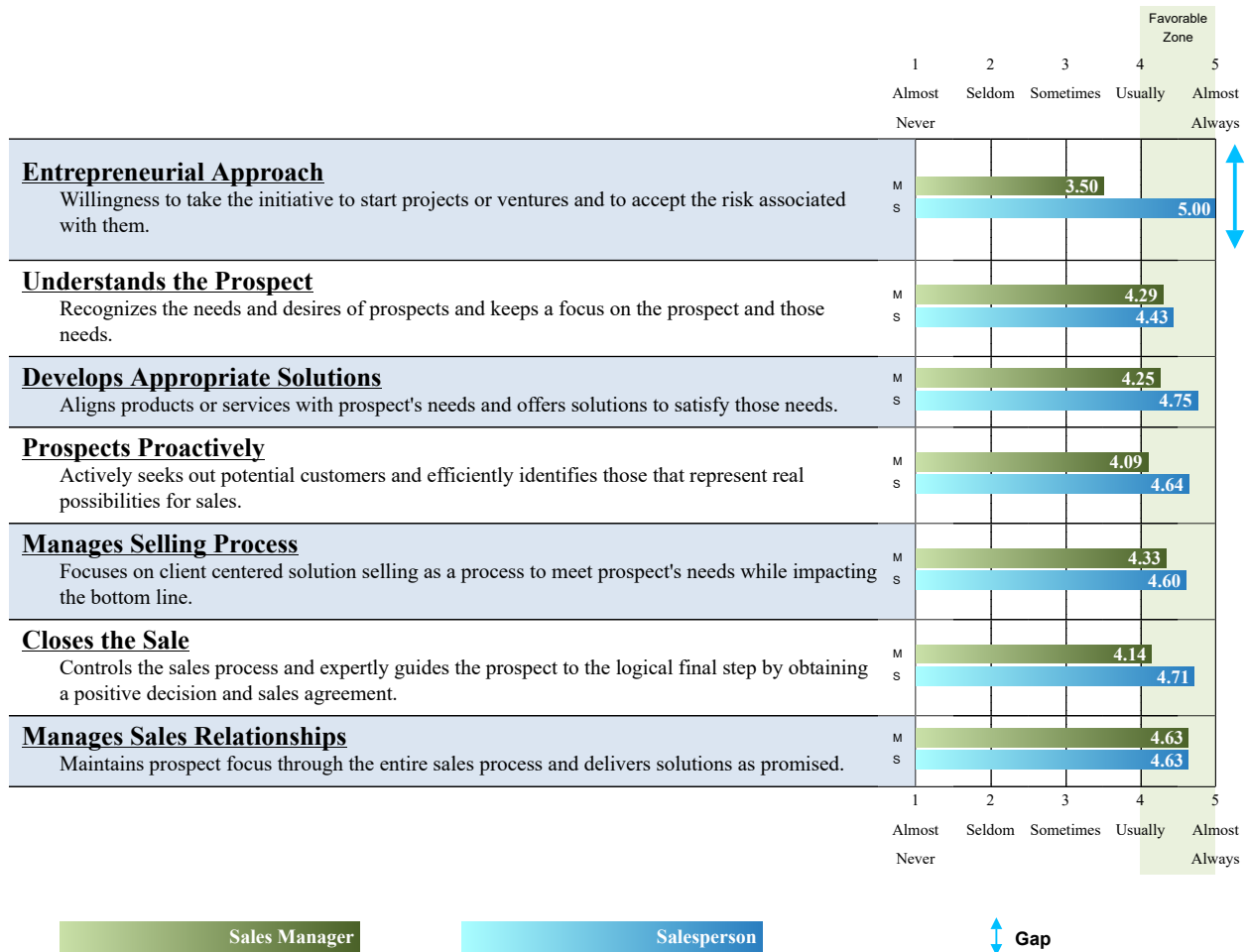
**S** **Closes effectively:** Guides prospect through the entire sales process and uses ethical methods to help prospect decide to buy.

**M** **Develops the relationship:** Creates and maintains client loyalty by building a reputation by following up on the sale and effectively servicing client after the sale.

**M** Sales Manager **S** Salesperson

## Executive Summary

The average rating for you and Sally Sample on the 7 Sales Competencies is presented in this section. The numbers shown are the average ratings. Note the differences between ratings, especially where there is a gap indicated (a difference of 1 point or more).





## Skill Set Analysis

Any differences between the Critical Skill Sets selected by you and Sally Sample are of particular interest. Such discrepancies suggest important differences between both of your expectations. They should be the initial subject of discussion.

The definitions for each Skill Set are provided along with the average score for you and Sally Sample. Any difference in ratings for these Skill Sets requires careful consideration and calls for an immediate discussion and possibly additional coaching. You may see a vertical arrow, which indicates the presence of a gap of 1.5 or more points between both your scores.

↔ A Critical Skill Set, according to **Salesperson** or **Sales Manager**, and both **Salesperson** and **Sales Manager** score averages differ by 1.5 points or more.

Ⓜ Ratings for Sales Manager

Ⓢ Ratings for Salesperson

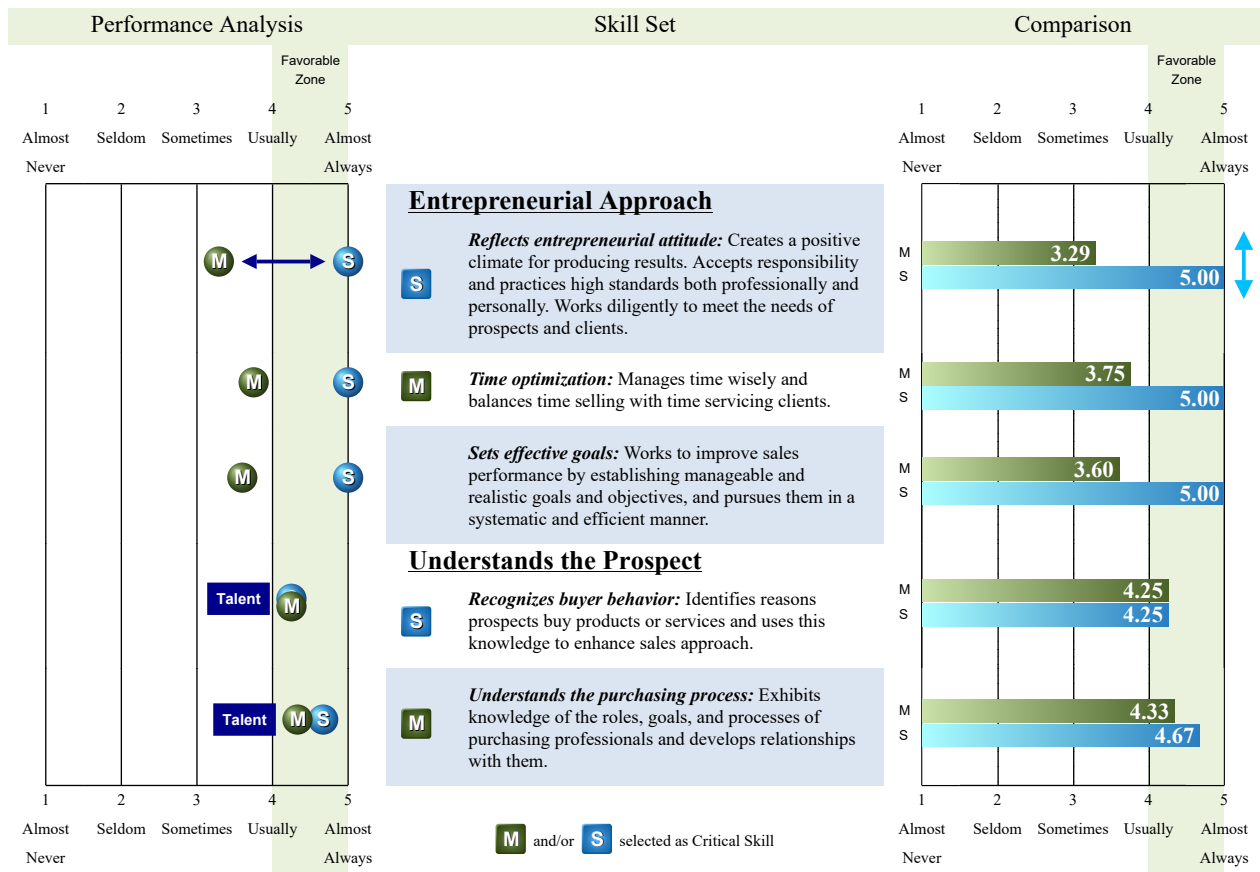
☐ Talent

☐ Focus

↕ A Critical Skill Set, according to **Salesperson** or **Sales Manager**, and both **Salesperson** and **Sales Manager** score averages are equal to or higher than 4.0

↕ A Critical Skill Set, according to **Salesperson** or **Sales Manager**, and both **Salesperson** and **Sales Manager** score averages below 4.0

↕ Any difference between respondents where averages vary by 1.5 points or more.



←→ A Critical Skill Set, according to **Salesperson** or **Sales Manager**, and both **Salesperson** and **Sales Manager** score averages differ by 1.5 points or more. Talent

M Ratings for Sales Manager  
S Ratings for Salesperson

Focus

A Critical Skill Set, according to **Salesperson** or **Sales Manager**, and both **Salesperson** and **Sales Manager** score averages are equal to or higher than 4.0

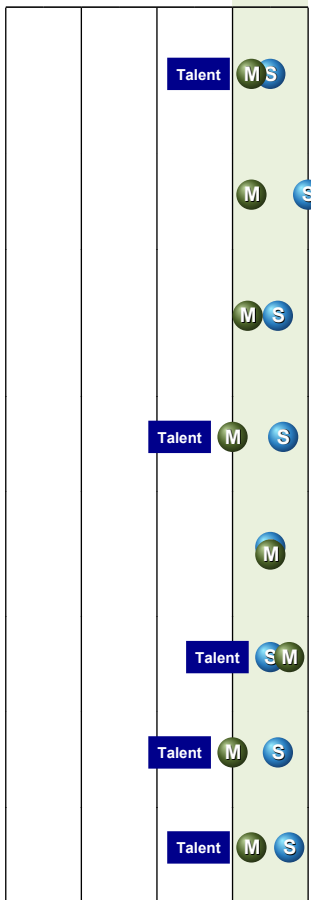
A Critical Skill Set, according to **Salesperson** or **Sales Manager**, and both **Salesperson** and **Sales Manager** score averages below 4.0

Sales Manager  
Salesperson

↕ Any difference between respondents where averages vary by 1.5 points or more.

Performance Analysis Skill Set Comparison

1 2 3 4 5  
Almost Seldom Sometimes Usually Almost  
Never Always



1 2 3 4 5  
Almost Seldom Sometimes Usually Almost  
Never Always

**Develops Appropriate Solutions**

S **Uses feature and benefit solutions:** Develops and offers solutions by communicating product characteristics and identifying how those characteristics will satisfy the prospect's needs.

**Knowledge of products:** Displays expert knowledge of products and services and uses this knowledge to quickly and effortlessly address a prospect's needs.

**Prospects Proactively**

**Identifies prospects:** Recognizes the characteristics of ideal prospects and focuses time and activities on those with the highest probability of becoming good clients.

M **Gets appointments:** Develops and implements relevant, compelling, client-centric communications to support efforts of getting meetings with prospects.

**Manages Selling Process**

**Understands client-centric selling:** Recognizes prospect's needs and strives to make the buying process as easy as possible.

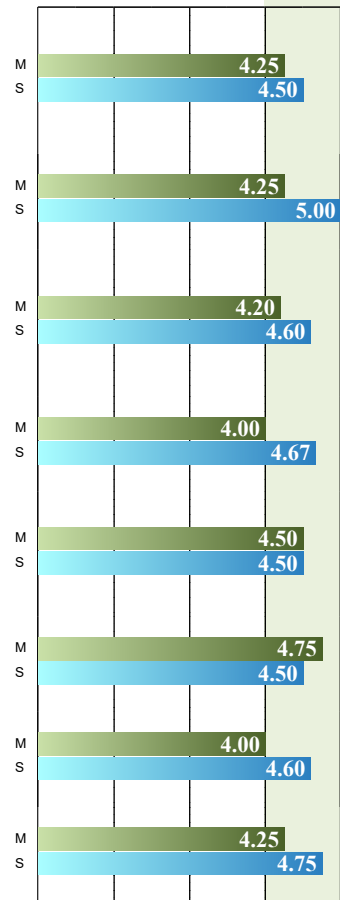
S **Establishes rapport:** Develops client relationships by building credibility and determining the specific and relevant linkages between salesperson and prospect.

M **Identifies prospect's needs:** Uncovers the real needs of prospects to increase the likelihood of making a sale and increasing client satisfaction.

S **Counsels prospect:** Counsels prospect to increase the sense of urgency and create discontent with the status quo.

M and/or S selected as Critical Skill

1 2 3 4 5  
Almost Seldom Sometimes Usually Almost  
Never Always



1 2 3 4 5  
Almost Seldom Sometimes Usually Almost  
Never Always

←→ A Critical Skill Set, according to **Salesperson** or **Sales Manager**, and both **Salesperson** and **Sales Manager** score averages differ by 1.5 points or more. Talent

M Ratings for Sales Manager

S Ratings for Salesperson

Focus

A Critical Skill Set, according to **Salesperson** or **Sales Manager**, and both **Salesperson** and **Sales Manager** score averages are equal to or higher than 4.0

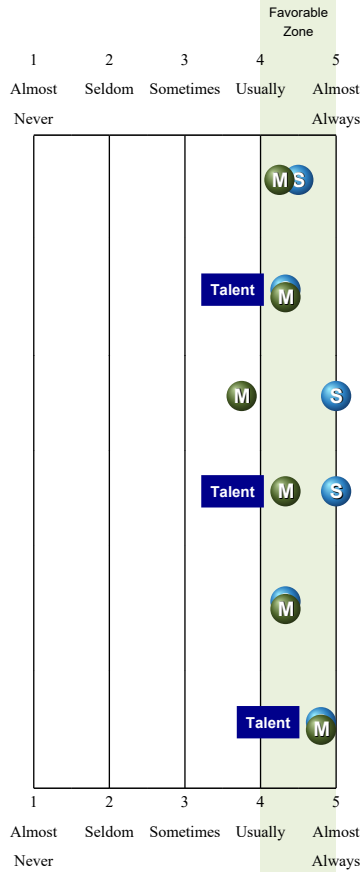
A Critical Skill Set, according to **Salesperson** or **Sales Manager**, and both **Salesperson** and **Sales Manager** score averages below 4.0

Sales Manager

Salesperson

↕ Any difference between respondents where averages vary by 1.5 points or more.

Performance Analysis Skill Set Comparison



**Closes the Sale**

*Explores prospect's options:* Provides prospect with choices tailored to their identified needs.

M **Presents ideal solution:** Demonstrates an understanding of prospect's needs and desires and uses product expertise to provide viable options for a solution.

*Overcomes objections:* Recognizes prospect's objections and provides clear and concise information to raise prospect's satisfaction level.

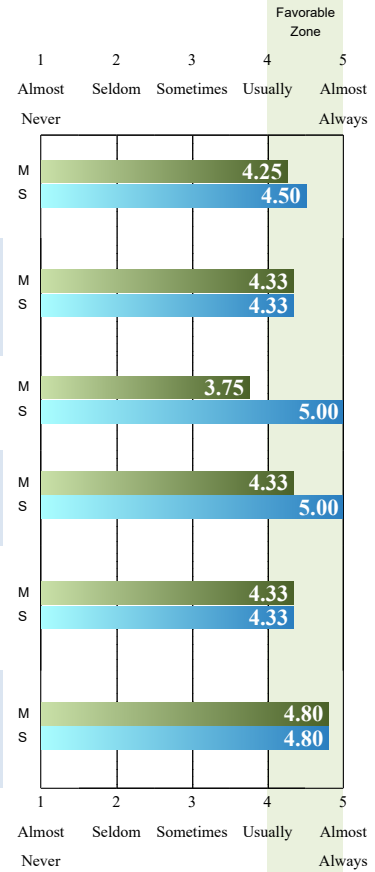
S **Closes effectively:** Guides prospect through the entire sales process and uses ethical methods to help prospect decide to buy.

**Manages Sales Relationships**

*Secures the relationship:* Stays in front of client and prospect's needs and establishes opportunities to generate contacts and do more business with them.

M **Develops the relationship:** Creates and maintains client loyalty by building a reputation by following up on the sale and effectively servicing client after the sale.

M and/or S selected as Critical Skill



## Survey Summary of the 79 items

The ratings for each individual question are shown for easy analysis. The rating by both you and Sally Sample for each individual behavior provides detail calling for study and possible coaching or training at a very specific level. Any significant differences in both ratings should require immediate attention by both of you.



**Sales Manager and/or Salesperson did not rate item**



**Bold Lettering:** Items that fall in a Critical Skill Set, as designated by Salesperson and/or Sales Manager



### Entrepreneurial Approach

**S** *Reflects entrepreneurial attitude*

1. Displays and maintains a positive attitude	3.00	5.00
2. Accepts risk when necessary	3.00	5.00
3. Puts client's needs first	2.00	5.00
4. Practices high ethical standards	3.00	5.00
5. Works on improving skills	4.00	5.00
6. Communicates in positive terms	4.00	5.00
7. Able to handle rejection	4.00	5.00

**M** *Time optimization*

8. Recognizes optimal time for prospecting	3.00	5.00
9. Recognizes optimal time for servicing clients	4.00	5.00
10. Selects appropriate opportunities	5.00	5.00
11. Evaluates time management on a regular basis	3.00	5.00

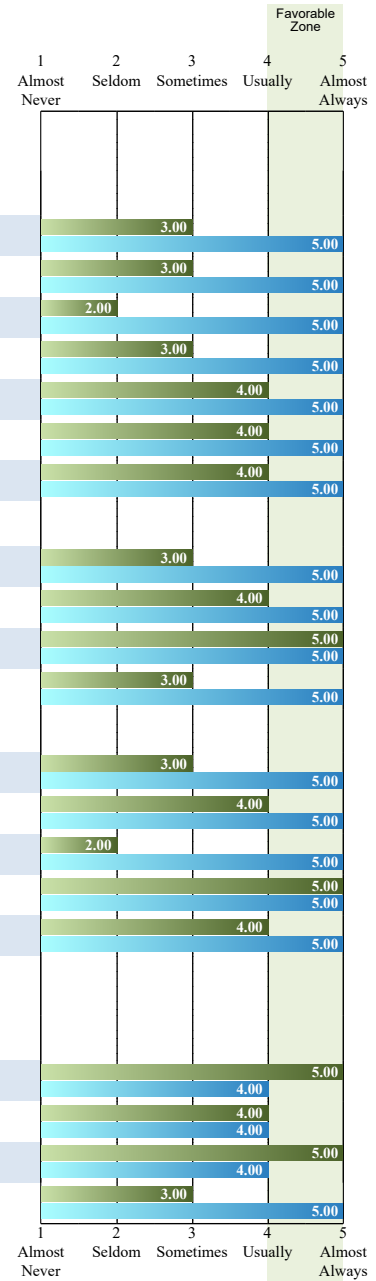
*Sets effective goals*

12. Develops goals that support overall objectives	3.00	5.00
13. Plans for how to achieve goals	4.00	5.00
14. Monitors progress toward goal achievement	2.00	5.00
15. Evaluates goal attainment process regularly	5.00	5.00
16. Holds self accountable for goal achievement	4.00	5.00

### Understands the Prospect

**S** *Recognizes buyer behavior*

17. Able to identify personal and business agenda of prospect	4.00	5.00
18. Able to recognize prospect's problem or need	4.00	4.00
19. Recognizes how change affects need and opportunity	4.00	5.00
20. Guides prospect through the buyer decision making process	3.00	5.00

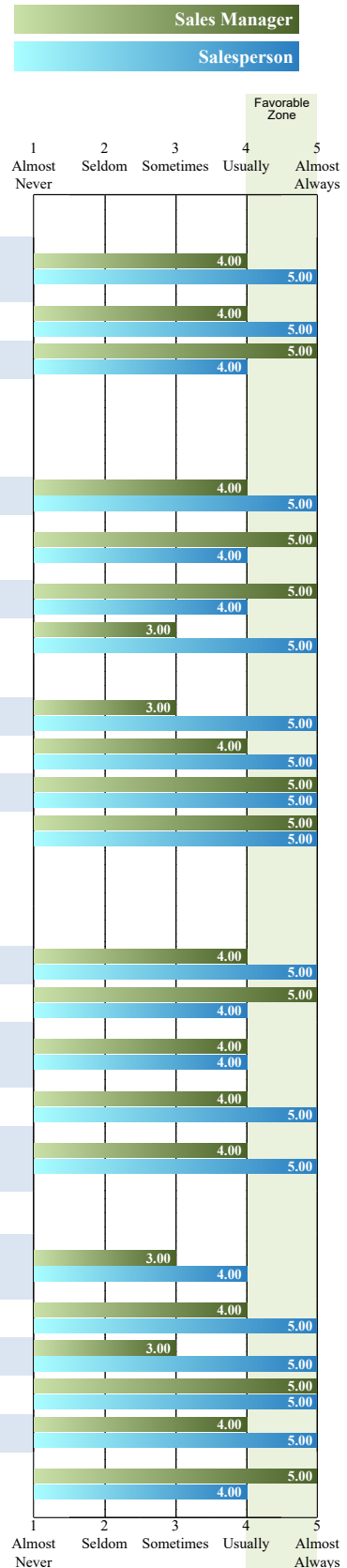




Sales Manager and/or  
Salesperson did not rate item



**Bold Lettering:** Items that fall in a Critical Skill Set,  
as designated by Salesperson and/or Sales Manager



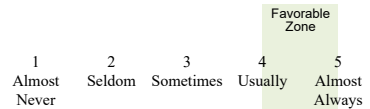


Sales Manager and/or  
Salesperson did not rate item



**Bold Lettering:** Items that fall in a Critical Skill Set,  
as designated by Salesperson and/or Sales Manager

Sales Manager  
Salesperson



**Manages Selling Process**

*Understands client-centric selling*

43. Treats sales transactions as relationships	4.00	5.00
44. Synchronizes selling with prospect's buying process	4.00	5.00

**S Establishes rapport**

45. Makes a good first impression	4.00	5.00
46. Builds credibility	5.00	5.00
47. Identifies specific linkages with prospect	4.00	5.00
48. Transitions efficiently to prospect's needs	4.00	5.00

**M Identifies prospect's needs**

49. Recognizes the real needs	4.00	5.00
50. Establishes self as creditable resource	4.00	4.00
51. Uses active listening well	4.00	5.00
52. Displays appropriate empathy	4.00	5.00
53. Uses questions effectively	3.00	5.00

**S Counsels prospect**

54. Demonstrates understanding of prospect's needs	5.00	5.00
55. Educates prospect on their primary needs	4.00	4.00
56. Raises prospect's urgency	3.00	5.00
57. Presents product as solution	5.00	5.00

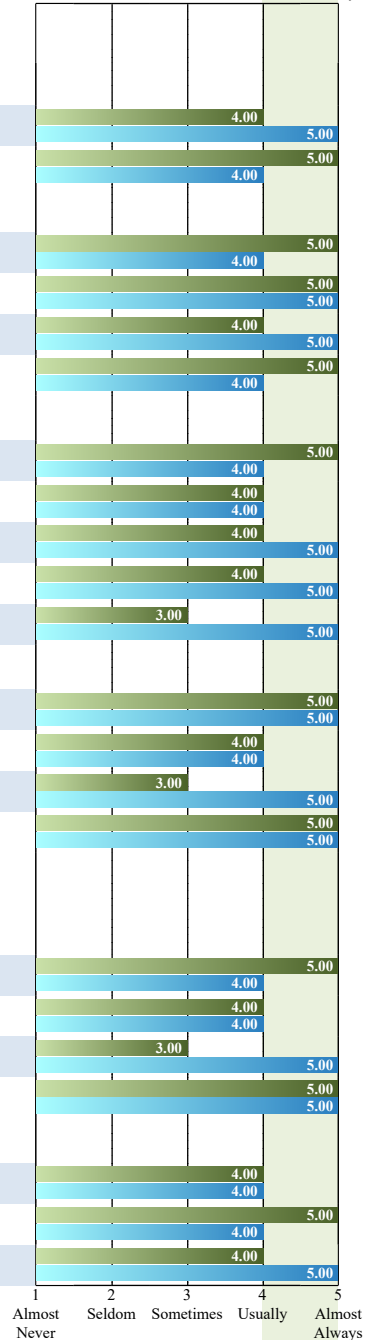
**Closes the Sale**

*Explores prospect's options*

58. Prepares prospect for different solution to their need	4.00	5.00
59. Involves prospect in exploration process	4.00	4.00
60. Acts appropriately as an expert	3.00	5.00
61. Presents correct solutions	5.00	5.00

**M Presents ideal solution**

62. Involves prospect in evaluation process	4.00	4.00
63. Offers well-thought-out solutions	4.00	5.00
64. Guides prospect's selection of solution	4.00	5.00





**Sales Manager and/or  
Salesperson did not rate item**



**Bold Lettering:** Items that fall in a Critical Skill Set,  
as designated by Salesperson and/or Sales Manager

**Sales Manager**  
**Salesperson**

*Overcomes objections*

65. Identifies basis for objection	4.00	5.00
66. Acknowledges legitimacy of the question	3.00	5.00
67. Clarifies the facts for the prospect	4.00	5.00
68. Responds with concise information	4.00	5.00

**S** *Closes effectively*

69. Identifies each step of sales process for prospect	5.00	5.00
70. Ensures all prospect's concerns have been satisfied	4.00	5.00
71. Uses a variety of closing techniques	4.00	5.00

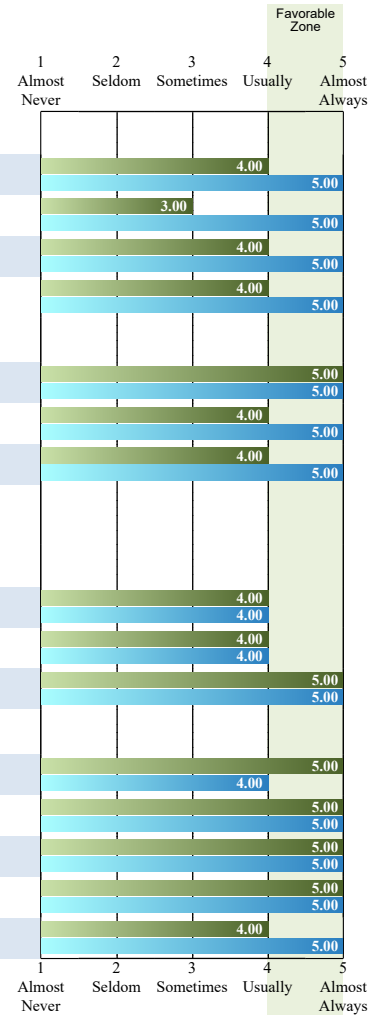
**Manages Sales Relationships**

*Secures the relationship*

72. Follows trends affecting prospects and clients	4.00	4.00
73. Builds reputation with the prospects and clients	4.00	4.00
74. Becomes an advocate for the clients	5.00	5.00

**M** *Develops the relationship*

75. Keeps clients loyal	5.00	4.00
76. Maintains communication with clients	5.00	5.00
77. Maintains honesty with clients	5.00	5.00
78. Utilizes up-selling and cross-selling where appropriate	5.00	5.00
79. Obtains referrals from clients	4.00	5.00



## Development Summary Overview

This section reviews the average ratings for each Skill Set. Both ratings for you and Sally Sample are shown. In this section we have grouped the Skill Sets based on the average ratings and where they fall in relation to the Favorable Zone.

The results for each Skill Set are sorted and grouped together based on whether you and Sally Sample identified them as critical. Within each grouping, scores are sorted by average rating for each Skill Set based on the average scores you provided. Here is how the results are grouped:

- **Mutually Rated Strengths** – The Skill Sets shown here are those which both you and Sally Sample rated in the Favorable Zone. These are clearly strengths that should be emphasized, but they should not be glossed over as there is always room for improvement. Discussions should focus on how to use these strengths to help develop those areas that may need improvement.
- **Strengths Rated by Sales Manager** – These Skill Sets are those where only your average scores were in the Favorable Zone. There should be open communication between you and Sally Sample to determine reasons for the differences between these ratings. It is important to align the expectations of Sally Sample with your expectations regarding these Skill Sets whenever possible.
- **Strengths Rated by Salesperson** – Sally Sample rated these Skill Sets in the Favorable Zone, but you did not agree. Meet with Sally Sample to understand why some of the behaviors were found wanting. Work together to align your expectations with regard to these Skill Sets with the expectations of Sally Sample.
- **Mutually Rated Below Favorable Zone** – Obvious opportunities for development are the Skill Sets that neither of you rated in the Favorable Zone. Training should be considered to help Sally Sample become more effective in these sales activities. Pay particular attention to those Skill Sets identified as critical by either of you.

Also identified are three Development Opportunities. These Development Opportunities represent an excellent opportunity for the enhancement of the sales effectiveness of Sally Sample. They were identified utilizing a combination of average ratings and their identification as critical to success (Critical Skill Set) by you both. As a result, some may fall either within or below the Favorable Zone. Regardless, each should become an important part of your sales ability development for Sally Sample.



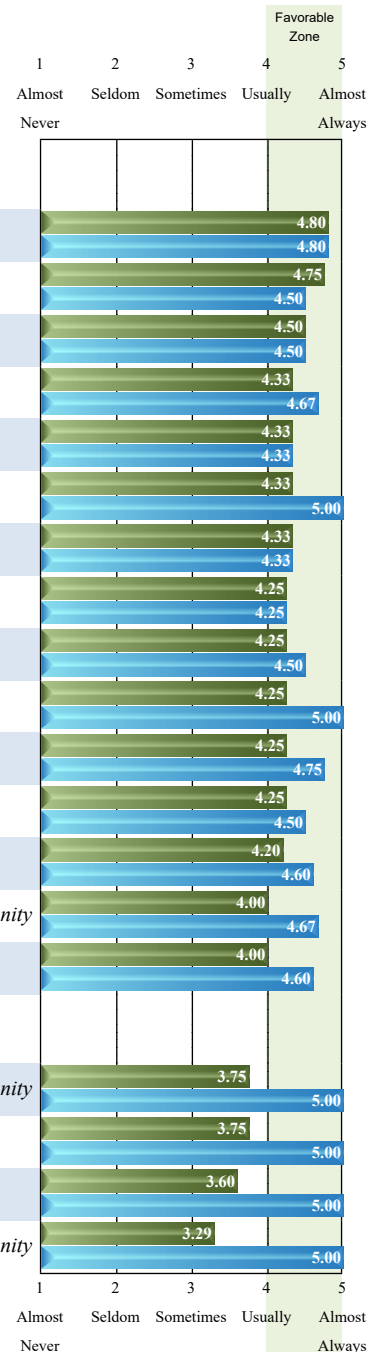
Here are the Skill Sets grouped according to how the average ratings fell in regard to the Favorable Zone. You should note the Development Opportunities that are suggested with these results; particularly where a Skill Set has been identified as critical. Of course, if a large variance between both of your ratings exists, a discussion is warranted.

**Mutually Rated Strengths**

<b>M</b>	<b>Develops the relationship</b>	
<b>S</b>	<b>Establishes rapport</b>	
	Understands client-centric selling	
<b>M</b>	<b>Understands the purchasing process</b>	
<b>M</b>	<b>Presents ideal solution</b>	
<b>S</b>	<b>Closes effectively</b>	
	Secures the relationship	
<b>S</b>	<b>Recognizes buyer behavior</b>	
<b>S</b>	<b>Uses feature and benefit solutions</b>	
	Knowledge of products	
<b>S</b>	<b>Counsels prospect</b>	
	Explores prospect's options	
	Identifies prospects	
<b>M</b>	<b>Gets appointments</b>	<i>Development Opportunity</i>
<b>M</b>	<b>Identifies prospect's needs</b>	

**Strengths Rated by Salesperson**

<b>M</b>	<b>Time optimization</b>	<i>Development Opportunity</i>
	Overcomes objections	
	Sets effective goals	
<b>S</b>	<b>Reflects entrepreneurial attitude</b>	<i>Development Opportunity</i>



**M** and/or **S** selected as Critical Skill Sales Manager Salesperson

# Management Considerations

03/22/2024

Regarding Sally Sample

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## Working with Sally Sample

To effectively manage the information provided in the Sales CheckPoint report we recommend working with Sally Sample to create an Action Plan to improve the skills deemed most critical to sales success. Think of the Action Plan as any other project or sales plan. Design the plan to be realistic, to consist of actions Sally Sample can take every day on the job, and to tie directly to sales priorities.

In the Sales CheckPoint report Sally Sample was encouraged to meet with you to develop this Action Plan. Your role is to coach Sally Sample on situations related to the Action Plan, provide feedback, and reinforce acceptable behaviors. Providing this input will help fulfill the intent of the Action Plan and bring a better understanding between you and Sally Sample.

An Action Plan Worksheet is provided for both you and Sally Sample. Before you meet with Sally Sample you will want to consider the following things:

- **Agreement of Critical Skills Alignment** – Look for where Sally Sample agreed with you on the skills you deemed most critical to success in sales.
- **Variance in Critical Skills Alignment** – Take note of the Skill Sets that you and Sally Sample did not agree were critical. Prepare to discuss your perceptions of each of these skills and the reasons for selecting these as critical. Look for opportunities to create alignment where possible.
- **Gaps in Perceptions** – If Gaps are indicated be prepared to explain your perception of this Skill Set and the reasoning why you gave it the rating you did.

While you are working through this worksheet with Sally Sample keep the following in mind:

- **Agreement of Critical Skills** – Acknowledge where there is alignment and ask if Sally Sample has any further questions. Use this as an opportunity to reinforce the areas where there is alignment between you and Sally Sample.
- **Critical Skills Selected Only by Sally Sample** – Seek to understand why Sally Sample felt that the Skill Set was critical. Don't put Sally Sample on the defensive but search for ways to bring alignment between you both.
- **Critical Skills Selected Only by You** – Explain why you selected those Skills Sets as critical. These areas of misalignment offer an excellent opportunity to improve communication and understanding between you and Sally Sample.
- **Development Opportunities** – Discuss each Skill Set listed. If a Skill Set has a Gap indicated, this suggests a discrepancy in the perception between you both. Talk about what these skills mean to both of you and your expectations.
- **K-S-S Method** – Review the steps of this method with Sally Sample. Emphasize the practical simplicity of this system.
- **Action Steps** – Help Sally Sample set a reasonable target date to implement the **K-S-S** method for each Skill Set. Work with Sally Sample to develop practical actions to Keep, Stop, and Start Doing. Make sure they are realistic and lead to development of that skill.

- **Additional Opportunities for Development** – Add any additional skills that you both feel need improvement. There is no rule that says you can't have more than three Development Opportunities but remember – less is more manageable.

Your role in assisting Sally Sample to improve on these Skill Sets does not end with this initial meeting. Shortly after your meeting with Sally Sample you will want to accomplish the following:

- **Schedule Follow-up Meetings** – You will need to check on the progress that Sally Sample is making in personal sales development.
- **Provide Training Resources** – Look for a sales training system which can be targeted to the specific needs Sally Sample has. There are a variety of sales training programs available. Suggest a sales training system which targets the specific needs of Sally Sample. It should provide live facilitation along with coaching methods to reinforce learning, increase goal accountability, and drive Sally Sample toward the desired results.
- **Schedule the next Sales CheckPoint** – This will provide tangible data as to the progress being made with Sally Sample.

As the Sales Manager there are many resources available to you to assist Sally Sample in improving the sales skills that you both defined in the worksheet. You may find some self-study materials or workshops that are relevant. Perhaps your organization has some current training programs that will be useful. Profiles International has additional assessments and consulting services that have proven useful to others. Your Profiles International Sales Representative is a valuable resource to help meet these needs. Contact your Profiles representative today.

For your reference,  
the remainder of this report is a copy of what was provided to Sally Sample  
in the Sales CheckPoint Individual Feedback Report.

## Action Plan for Sally Sample

You cannot risk leaving your sales development to chance; planning is essential. How many times have you stated to yourself or others your intentions to act but fall back into old habits? Successful Salespeople follow through on development plans when the development need is directly linked to a sales challenge or pain point. The most significant development opportunities take place on the job and are totally under your control.

People tend to play to their strengths – choosing to utilize one sales skill over another due to their personal proficiencies. They have the knowledge and experience to use certain skills in almost any situation. If you don't favor or simply lack proficiency with a sales skill that is deemed important to being successful, there are two steps you can take immediately.

1. First, if you know what to do differently to improve a skill or behavior, do it!
2. Second, create an Action Plan. Your plan need not be complex. Most often, your best course of action for personal and professional growth and development is obvious and easy to recognize.

The results from the Sales CheckPoint you recently completed identified the following Development Opportunities, although there might be others that are identified as you go through this process.

- **Time optimization** – Manages time wisely and balances time selling with time servicing clients.
- **Reflects entrepreneurial attitude** – Creates a positive climate for producing results. Accepts responsibility and practices high standards both professionally and personally. Works diligently to meet the needs of prospects and clients.
- **Gets appointments** – Develops and implements relevant, compelling, client-centric communications to support efforts of getting meetings with prospects.

The following Action Plan Worksheet will aid you in developing your next steps to improve the skills deemed most critical in enhancing your sales behaviors and, therefore, your income. Your Action Plan is designed to be realistic, will consist of actions you can take every day on the job, and will tie directly to the sales priorities identified by both you and your Sales Manager.

The K-S-S method proves to be extremely successful when trying to improve behaviors and consists of three simple steps:

- K** = actions you should **KEEP** doing, which are things you already do well. **KEEP** doing them!
- S** = actions you should **STOP** doing. If you recognized sales behaviors that bring negative results while you analyzed your Sales CheckPoint – it was an indication of something you should **STOP** doing.
- S** = actions you should **START** doing. You have learned things you could be doing to enhance your sales effectiveness. **START** doing them at the earliest opportunity. As you add to your knowledge

base and acquire ideas for better sales performance, form the habit of doing them. Make START doing a regular part of your development process.

Your Action Plan Worksheet is an effective tool to help improve your selling abilities. It consists of three elements.

### **Critical Skills Alignment Summary**

- Review the Critical Skill Sets selected by you and your Sales Manager that were displayed on the "Critical Skill Set Alignment" page in your Sales CheckPoint report.
- Notice where there is alignment with you both. A discussion with your Sales Manager about what each skill means to you both will help clarify any differences in observations.
- Next, look at the Skill Sets where you both did not agree. Discuss with your Sales Manager the differences in your opinions in an effort towards alignment on these Skill Sets.

### **Development Summary Overview**

- Review each Development Opportunity identified in the "Development Summary Overview" page of your report. Underneath the Skill Set you will see the scores for both you and your Sales Manager and an icon to indicate whether this Skill Set is a Talent, Focus, or has a Gap. Where there is a Gap a discussion with your Sales Manager concerning your different perceptions is important
- To the right of this information there is an area to write down the changes you plan to make to improve on this vital Skill Set. Using the K-S-S method write down one or two actions that you plan to Keep, Stop, and Start Doing.
- Your actions may include discussions with your Sales Manager, detailed reviews of the behaviors contained in a given Skill Set, a request for clarification about a specific rating that your Sales Manager provided, and working to improve communication between you and your Sales Manager.
- Decide on a target date that you and your Sales Manager feel you can implement the Action Steps for this skill.

### **Additional Development Opportunities**

- This section is used just like the section above it – Development Summary Overview. Use this area to add more Skill Sets if you and your Sales Manager agree on them.

Refer to your Action Plan Worksheet often. Don't leave your sales future to chance. Now is the time to take action! Review your Sales CheckPoint Report. Set an appointment to complete your Action Plan with your Sales Manager. Follow through with your Action Plan.

## Action Plan Worksheet

Discuss the available resources with your Sales Manager to help you reach these goals. An excellent choice is an online sales training system which will allow you to work at your own pace.

### Critical Skills Alignment Summary

#### Sales Manager

- ✓ Time optimization
- ✓ Understands the purchasing process
- ✓ Gets appointments
- ✓ Identifies prospect's needs
- ✓ Presents ideal solution
- ✓ Develops the relationship

#### Both

#### Salesperson

- ✓ Reflects entrepreneurial attitude
- ✓ Recognizes buyer behavior
- ✓ Uses feature and benefit solutions
- ✓ Establishes rapport
- ✓ Counsels prospect
- ✓ Closes effectively

### Development Summary Overview

#### Development Opportunities

##### Time optimization

**M** – 3.75

**S** – 5.00

#### My Action Steps

**Target Completion Date:** \_\_\_\_\_

**Keep Doing:** \_\_\_\_\_

**Stop Doing:** \_\_\_\_\_

**Start Doing:** \_\_\_\_\_

### Development Summary Overview

#### Development Opportunities

#### My Action Steps

Reflects entrepreneurial attitude

M – 3.29

S – 5.00



Target Completion Date: \_\_\_\_\_

Keep Doing: \_\_\_\_\_  
\_\_\_\_\_

Stop Doing: \_\_\_\_\_  
\_\_\_\_\_

Start Doing: \_\_\_\_\_

Gets appointments

M – 4.00

S – 4.67

Target Completion Date: \_\_\_\_\_

Keep Doing: \_\_\_\_\_  
\_\_\_\_\_

Stop Doing: \_\_\_\_\_  
\_\_\_\_\_

Start Doing: \_\_\_\_\_

### Additional Development Opportunities

#### Development Opportunities

#### My Action Steps

M – \_\_\_\_\_

S – \_\_\_\_\_

Talent Focus

Circle one if appropriate

Target Completion Date: \_\_\_\_\_

Keep Doing: \_\_\_\_\_  
\_\_\_\_\_

Stop Doing: \_\_\_\_\_  
\_\_\_\_\_

Start Doing: \_\_\_\_\_



### Additional Development Opportunities

#### Development Opportunities

#### My Action Steps

M — \_\_\_\_\_  
S — \_\_\_\_\_  
Talent Focus ↔ Gap  
Circle one if appropriate

Target Completion Date: \_\_\_\_\_

Keep Doing: \_\_\_\_\_  
\_\_\_\_\_

Stop Doing: \_\_\_\_\_  
\_\_\_\_\_

Start Doing: \_\_\_\_\_

M — \_\_\_\_\_  
S — \_\_\_\_\_  
Talent Focus ↔ Gap  
Circle one if appropriate

Target Completion Date: \_\_\_\_\_

Keep Doing: \_\_\_\_\_  
\_\_\_\_\_

Stop Doing: \_\_\_\_\_  
\_\_\_\_\_

Start Doing: \_\_\_\_\_