



Report designed for

Sally Sample

Sales CheckPoint Performance Feedback System™ Management Summary Report

Report Prepared: March 22, 2024

CONFIDENTIAL

Survey Completed: August 9, 2022

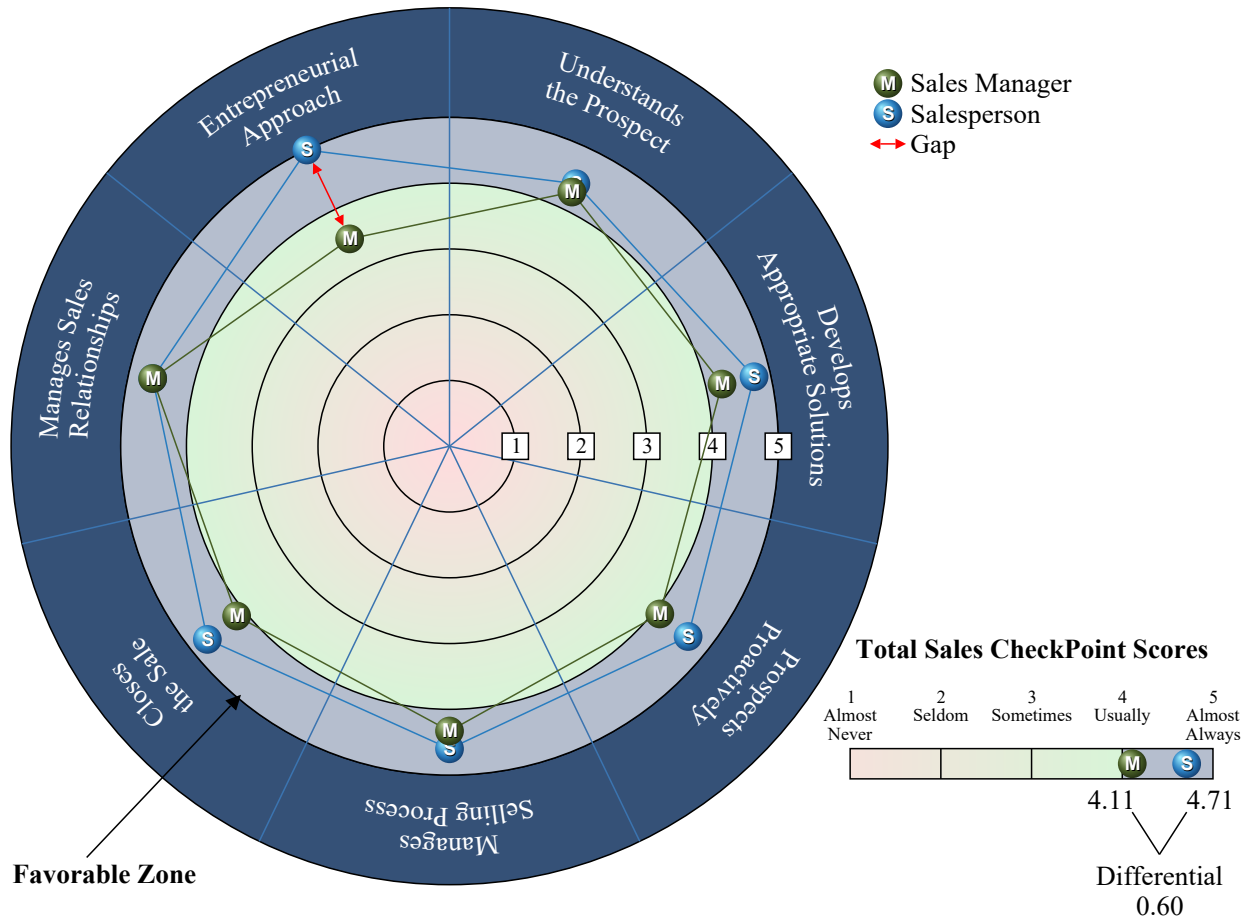
This report includes responses from:

Salesperson and Sales Manager – Baker, Ramona

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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.

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.

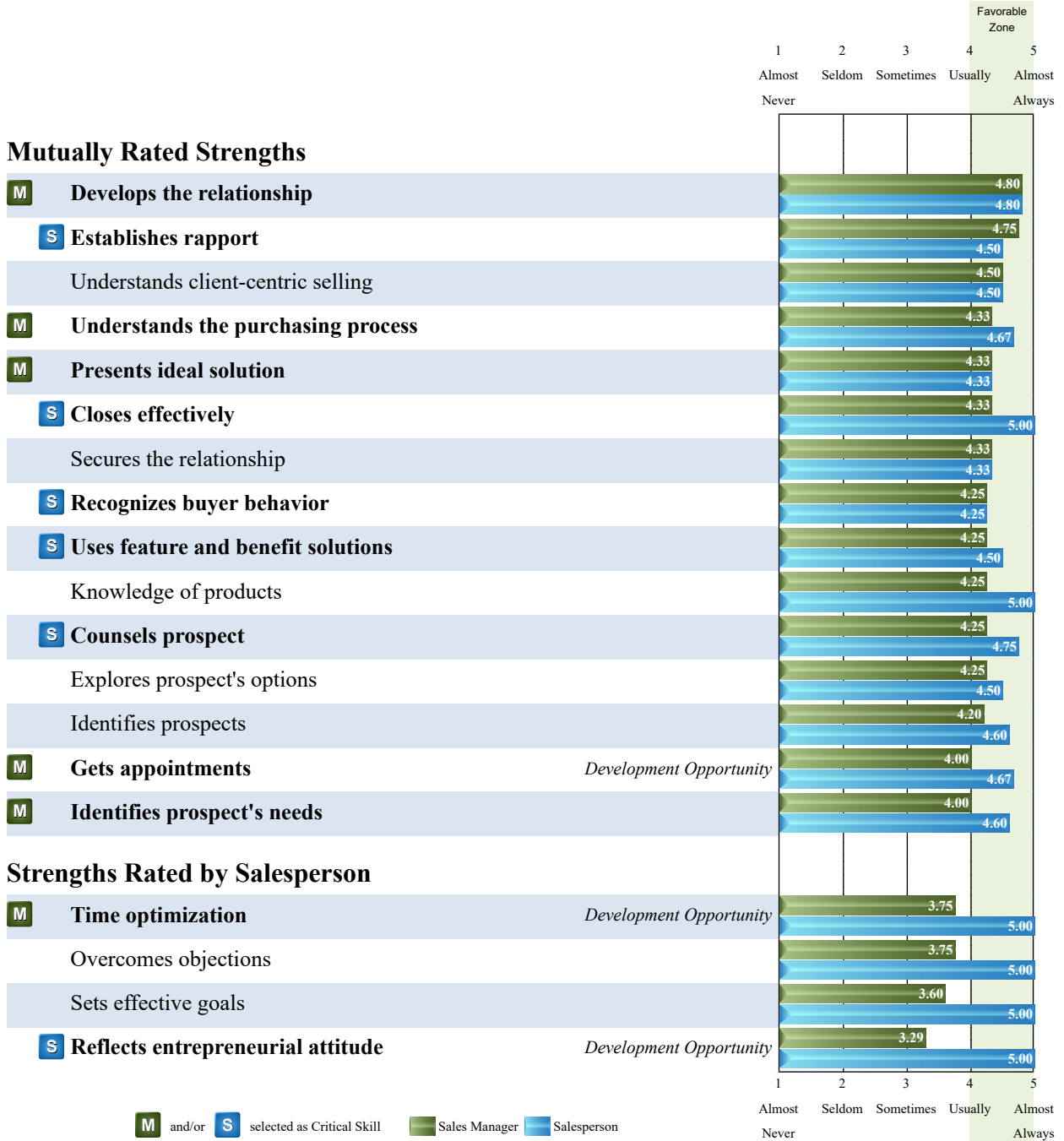
S Closes effectively: Guides prospect through the entire sales process and uses ethical methods to help prospect decide to buy.

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

Development Summary Overview

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.



Maximizing Your Overall Sales Potential

The challenge for all organizations is creating a culture that will foster a level of commitment and accountability to the ongoing development of the individual Salesperson. The success of the Sales CheckPoint process is not in the execution of the surveys, but in the follow through in developing your Salespeople.

This Management Summary Report contains a condensed view of the Sales CheckPoint Management Report, displaying your Salesperson's perception of their performance as compared to your ratings.

It is highly recommended that you refer to the Sales CheckPoint Management Report for detailed insight in creating action plans for targeted development.

While it is important that you work with each Salesperson to improve their skills, Salespeople should be held personally accountable for their own development through an individual plan supported by coaching and continuous feedback from you.

As Salespeople benefit from ongoing development and their effectiveness increases, the impact on the overall performance of the organization will become apparent. Progress will be demonstrated with subsequent Sales CheckPoint Surveys which will also highlight those areas still needing attention.

The key to enhancing any organization's sales strategies is ensuring that Salespeople at all levels utilize the information provided.