

Sales Performance Assessment

SPA Candidate Report

Sam Smith

ABC Company



Introduction

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

Sales Profile

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

Job Match

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

Assets and Potential Challenges

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

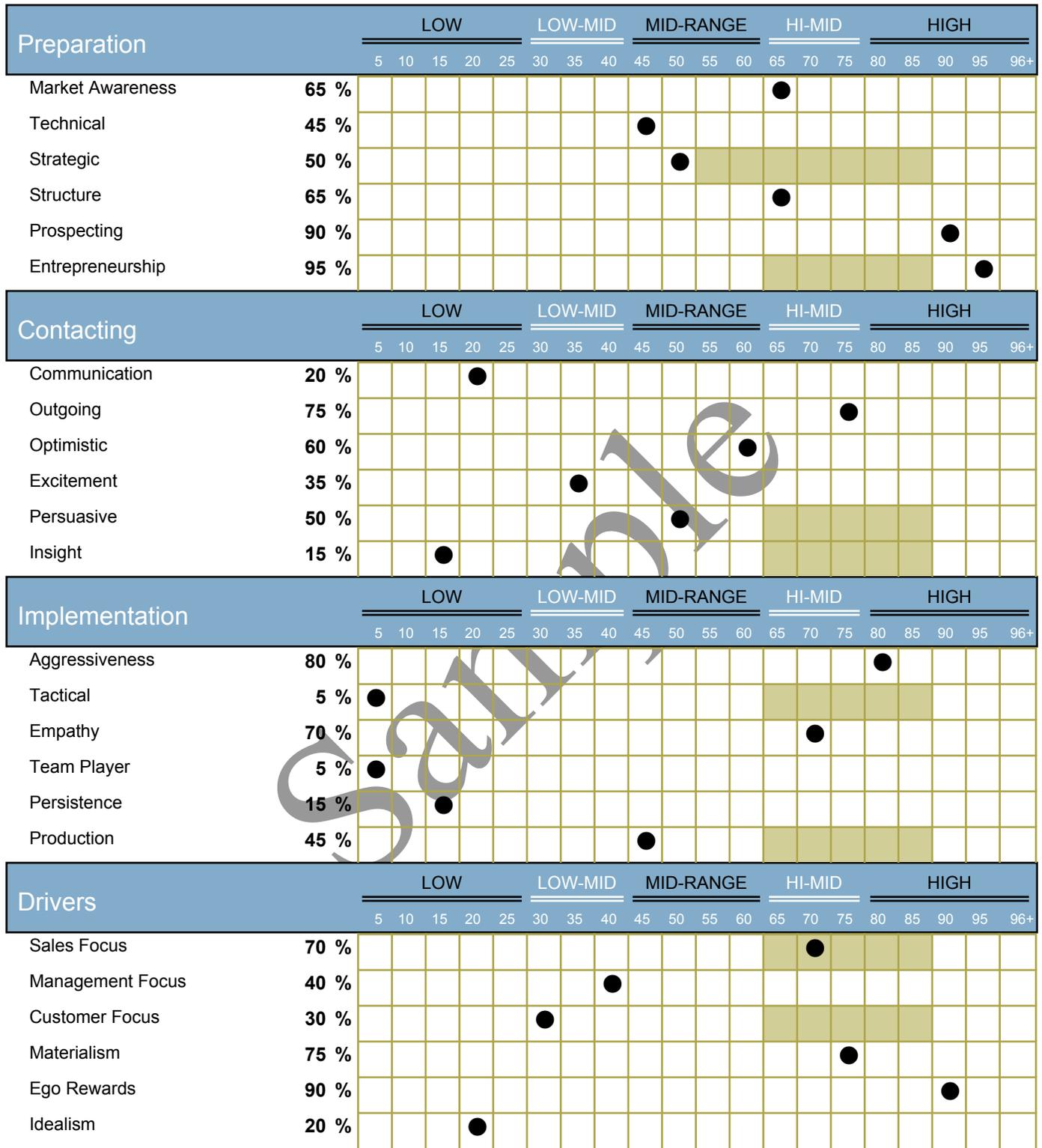
Interview Questions

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

Caution:

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

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



PREPARATION

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

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

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

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

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

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

CONTACTING

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

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

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

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

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

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

IMPLEMENTATION

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

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

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

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

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

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

DRIVERS

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

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

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

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

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

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

Role Requirements Match

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

- ◆ **Entrepreneurship**
- ◆ **Sales Focus**

Sam Smith is below the role requirements range for the following variables:

- ◆ **Strategic**
- ◆ **Persuasive**
- ◆ **Insight**
- ◆ **Tactical**
- ◆ **Production**
- ◆ **Customer Focus**

Sample

Assets

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

1. Acts like an independent creative business professional; approaches the sales role like it is his/her own business; takes initiative; likely to be a good negotiator; looks for innovative solutions to problems; is energized by new products and creative product lines.
2. Devotes attention to finding potential customers; builds up the lead pipeline; sees many situations as an opportunity to network in order to build/expand prospect list.
3. Likely to make a strong initial impression; demonstrates self confidence; comfortable in the spotlight with customers; holds people's attention; a dynamic, confident presenter.
4. Forceful approach to sales; pays close attention to closing the sale; competitive and energized by winning; can be successful in handling the difficult sale; not afraid to ask for the order.
5. Friendly, accepting and informal with customers; focuses on the interpersonal aspects of selling; gregarious, affable and has an easy way with people; often turns customers into friends.
6. Strongly motivated by financial and material incentives; drawn to material rewards; responds well to financial incentives; likely to be more motivated by a highly leveraged compensation plan.
7. Strong identification with sales role; takes pride in selling; has a strong commitment to sales as a profession; exhibits a strong sales presence; sees sales as critical to the success of the business.
8. Builds genuine close relationships with customers; shows concern for customers and their well-being; spends time gaining understanding of customer's needs; seeks to help and support customers; is a good listener.

Potential Challenges

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

1. May operate too independently from the home office; may not be as attentive to internal colleague relationships; may not be seen as a loyal company member; may sometimes be viewed as too self-serving or uncooperative; may have greater loyalty to the customer than one's own company.
2. May sometimes be too hands-off with less sharply tuned business instincts; may sometimes be impractical or inflexible; may not be as responsive to opportunities as they occur; may provide overly complicated solutions .
3. May be less insightful about people and their motivations; may not read people accurately; may miss changes in customers' moods and sometimes miss important subtleties; may not see customers as unique individuals and may sometimes rely on a more uniform, one-size-fits-all approach to sales.
4. May give up too easily; may not be as disciplined with follow-through; may have trouble staying focused during long sales cycles; may be more attracted by the new opportunity than managing the existing opportunities; may start strong but lose momentum.
5. May not keep customers well informed or up-to-date; may not spend enough time educating the customer; may not provide all the information that some customers need or want; may sometimes be unclear when communicating to customers.
6. Unlikely to view the sales role, the company or the products in an idealistic way; may be too expedient; may fail to take a stand on issues; may be inclined to tell the truth attractively and be distrusted by some customers as a result.
7. May not be focused enough on serving the customer; may have a more utilitarian view of the customer as merely a sale; may be too focused on short term sales objectives over building long term customer relationships; may miss the opportunity to gather valuable customer insights to share with the company; may jeopardize the potential for repeat business.
8. May not be expressive enough; may not convey enough enthusiasm about the products or the customer; may have less impact during presentations; may fail to capture the customer's emotional commitment.

9. May be overly motivated by recognition; may put off people by constantly vying for attention; may talk when should be listening; may make unwise decisions in pursuit of recognition or affirmation; may not handle rejection well.
10. So invested in prospecting may not be sufficiently discriminating regarding the real legitimacy of the prospect; may sometimes spend more time expanding the prospect list than converting prospects into customers.
11. So independent and creative may sometimes be impulsive or too much of a renegade; may chafe against some company restrictions; creativity may sometimes border on being disorganized; may be a challenge to manage.

Sample

INTERVIEW QUESTIONS – Tactical

Sam Smith scored low on **Tactical** indicating less emphasis placed on being practical, responsive and action-oriented in the sales role. This may result in this person being slower to respond to customers; potentially being less flexible or practical when addressing customer needs. This may reduce this person's effectiveness when the sales role requires this individual to:

- Respond with simple, practical solutions to customer needs
- Demonstrate flexibility or change direction quickly
- Be very tangible and concrete in describing the next steps for the customer
- Work effectively in a fast-paced, action-oriented environment

Use one or more of the following interview questions to explore the orientation Sam Smith has towards **Tactical**:

1. Please recall a recent experience in which an order was somehow fouled up and as a result you had a problem with a customer. What did you do about it, and what was the outcome?
2. Please give an example of a sales situation where you were your most flexible in resolving customer issues and successfully gaining their business.
3. Please tell us about your most impatient customer. How do you successfully manage this customer relationship?
4. Please describe a situation where you may have moved too slowly and missed or almost missed an opportunity to make a sale or expand business with a customer.
5. Please describe a situation where solving a problem in a simple, practical way turned out to be the best approach. Please contrast this with a situation when solving a problem in a more complex, comprehensive approach was the best approach to take.
6. How do you recognize when things are moving too quickly or you are trying to do too much at once?

NOTES:

INTERVIEW QUESTIONS – Insight

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

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

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

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

NOTES:

INTERVIEW QUESTIONS – Customer Focus

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

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

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

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

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INTERVIEW QUESTIONS – Team Player

Sam Smith scored low on **Team Player** indicating less emphasis placed on focusing on the interests of the organization and being in alignment with his or her team. This may result in this person operating in ways that are independent or perhaps even contrary to what the company wants or to be less focused on adhering to company policy than may be ideal. This may reduce this person’s effectiveness when the sales role requires this individual to:

- Support and carry out the company mission
- Be an advocate for the company’s interests
- Perform as part of a collaborative team
- Align and/or conform to company norms, policies and procedures

Use one or more of the following interview questions to explore the orientation Sam Smith has towards **Team Player**:

1. Sometimes the home office needs can be in conflict with the needs of the sales force. In your organization, what kinds of things does the home office do that make it more challenging for you to be successful?
2. How would you describe the potential ideal relationship between the home office administrative people and the sales organization?
3. In many sales situations there comes a point when the needs of the customer and the needs of your company are going to be at odds. Will you please describe some examples of how you have handled these potentially conflicting needs?
4. In your current organization, which of your colleagues do you have the most collaborative relationships with? How do these relationships support successful outcomes for each of you?
5. Will you please describe a situation when your interests and ideas were in conflict with those of your current organization? How did you handle this situation?

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INTERVIEW QUESTIONS – Persistence

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

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

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

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

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INTERVIEW QUESTIONS – Communication

Sam Smith has scored low on **Communication** indicating less time spent on educating customers and keeping them well informed about products and services. This may result in appearing to be less forthcoming with knowledge sharing and giving only the specific information the customer requests. This may reduce this person's effectiveness when the sales role requires this individual to:

- Educate the customer
- Use knowledge sharing to build customer loyalty
- Ensure customer satisfaction with customers who want to be kept well-informed
- Provide in-depth information on complex products or services

Use one or more of the following interview questions to explore the orientation Sam Smith has towards **Communication**:

1. How do your customers/prospects find out about what is going on in the product/service areas you provide?
2. Please describe a sale you have won because you kept in touch with your customer or prospect.
3. Please describe your approach to providing education to your customers? How has your approach evolved over the last three years?
4. Please describe a situation where you have not provided enough information or education to a customer. How did that impact your business relationship with this customer?
5. How do you decide how much information to provide as well as the ideal way to present the information to meet each of your customer's unique needs?

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ADDITIONAL NOTES:

Sample



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