



In Reference To:

*JP Dolezal*

**ACME co.**

September 23, 2013



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Thank you for utilizing our sales assessment portfolio. Before you read the evaluation, I would like to discuss a few of its concepts. First, I would like you to remember why this assessment is used. Its primary purpose is to give a good overview of what our strengths are as well as what some of the things are that may be holding us back.

To understand this assessment is to be open to what is pointed out as our hidden beliefs. These are beliefs that we may or may not even know that we have. We all have them, but often they are subconscious. The beliefs are either supported or non-supported in the business of sales and business development. The higher the score, the more our ability to grasp these ideas. In sales today the development of these skills are necessary to be successful.

Developing business is much more in-depth than it used to be. To be successful in developing business, we need to engage the right process and must to have beliefs that go along with that process.

Second, it's best to address the assessment in a few different ways. Read it a few times to really grasp what it is saying. Often, we get caught up in not agreeing with something in the report and miss the real benefit of the assessment. Additionally, when you read both the strengths and particularly the weaknesses, try to think about how these weaknesses and strengths could reveal themselves in our own selling situations.

Lastly, I think the most important thing to remember is that this assessment and every belief in the assessment, compares us to what would be considered a perfect salesperson.

And since there really is no such thing, please feel comfortable if you don't get 100% on everything. I personally recommend looking very closely, though, at any score that is below 75 in a particular area, try to think about a situation where this may show itself and/or effected a situation. Additionally if you cannot think of one specifically, think about how it could effect a situation.

Thanks and good selling!

Greta

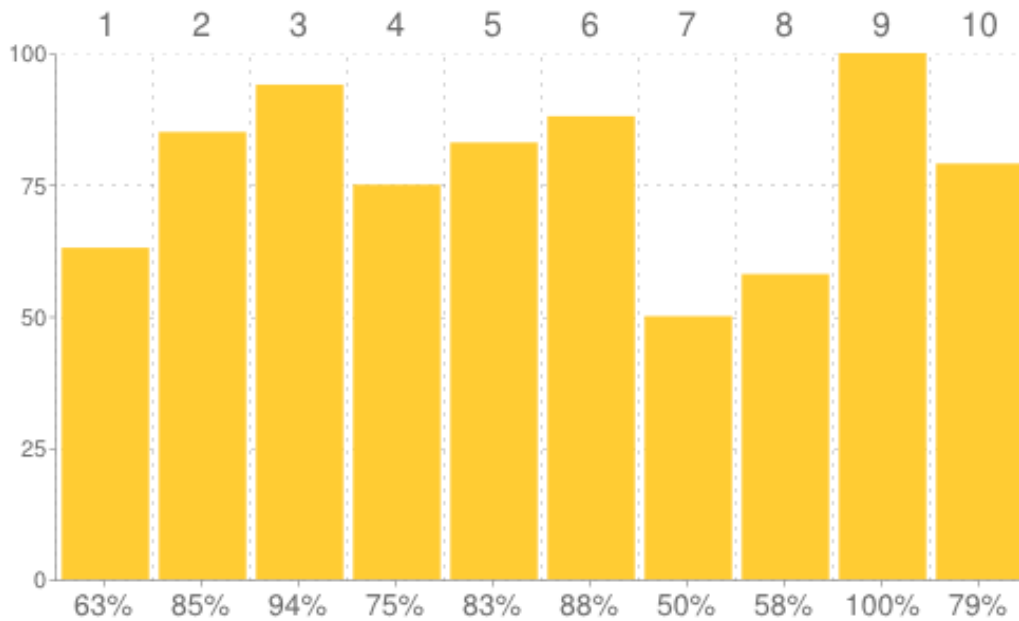
### Overall Assessment Results

JP Dolezal, ACME co.

No.	Category	Results	Rating
1	Money Tolerance	15 out of 24	63%
2	Calling on VITO	17 out of 20	85%
3	Need for Approval	15 out of 16	94%
4	Relationship Building	03 out of 04	75%
5	Vulnerability to TIO (Think it Over)	20 out of 24	83%
6	Desire and Commitment	07 out of 08	88%
7	Goal Setting	06 out of 12	50%
8	Prospecting	07 out of 12	58%
9	Bravery	04 out of 04	100%
10	Sales Process	22 out of 28	79%
<b>Assessment Total</b>		<b>116 out of 152</b>	<b>76%</b>

### Category Ratings

JP Dolezal, ACME co.



## **1. Money Tolerance**

This weakness will show itself in a few ways. First, it may be difficult to bring up the conversation about money. Uncovering a budget is crucial in preparing for a sale. JP likely is not able to have this conversation. If this conversation isn't brought to the table, when a proposal is submitted, the prospect may have a tendency to just look at the price (as it hasn't yet been discussed), and make their decision solely based on the number they see.

Prospects themselves don't often encourage the budget conversation; either they are used to or are typically more comfortable with waiting until the proposal is sent to see what the price range will be. If there is no early conversation about money and it is brought up at the very end, the prospect has much more negotiation power than the salesperson.

If there's a weakness in this area, you'll see JP negotiating more often with you to discount than with the prospect to accept the actual cost. JP sometimes thinks that if he can reduce the price, he will be more likely to close the sale, ultimately reducing your margins. Most decisions are not made on cost alone; therefore, if the cost of your product/service is the lowest amongst your competitors, it does not necessarily increase the likelihood of closing the sale.

JP is often uncomfortable talking about money, and typically unable to uncover the actual budget. JP has a skewed concept of what constitutes "a lot," which may cause him to be ineffective when selling a "high ticket" item in the marketplace. JP may present inaccurate proposals, either high or low, because of a lack of awareness of what the customer is willing to spend. Because of this, negotiations often will happen at the wrong time and from an inferior position.

JP likely is not able to:

- Establish what the prospect has in the budget for the product/service
- Help the prospect discover what they are willing to invest
- Walk together with the prospect to find additional budget if it makes sense
- Remain firm when it comes to money
- Sell instead of negotiate

If interviewing, recommended questions:

"What do you consider to be 'a lot of money'?"

- You're looking for a high number - certainly higher than your product or service. If they say, "it depends on the item," ask them "what's a purchase you have to think about before making."

"How would you respond to a prospect who loves what you have to offer, but says they can't afford it?"

- An answer that addresses asking questions and digging deeper - not just "I would see what they can afford."

## **2. Calling on VITO**

When a sales rep has a lot of appointments with mid-level prospects (mid-management), you'll know he has issues with calling on "VITO" (Very Important Top Officer from the book "Selling to VITO"). Typically, mid-level prospects tend to be more inviting than VITO, and the average salesperson will accept this invitation and not push to get to the decision maker. And what's worse, they often feel that they don't "deserve" to be calling at that level. If this is the case, you may hear the salesperson say things like "the president doesn't see salespeople." This ultimately boils down to a belief issue on their part; the salesperson believes that he is "below" VITO's level and therefore will not call on him.

This weakness shows itself in other ways that can ultimately hurt the opportunity for a sale. When a salesperson is not calling "at the top," the selling cycle is significantly longer since there are layers of decision makers to wade through. Even if the salesperson calls on the "non-decision maker" that is interested in his product/service, there are other influencers and typically then an ultimate decision maker that still need to be addressed. If the salesperson is not calling on the final decision maker to begin with, the chances of closing the deal are a lot less likely.

JP often is confident enough to call on "VITO", but may sometimes be pushed down to another person in the organization, possibly because of a self-esteem issue. The right questions are sometimes not being asked for JP to immediately negotiate with "VITO," but often he will be able to get a commitment to include "VITO" later in the sales cycle.

JP may not be able to:

- Get to the final decision maker
- Get past the gatekeeper
- Speak the language of the decision maker
- Really get the decision maker's attention
- Talk to tough decision makers
- Understand this level of organizations

If interviewing, recommended questions:

"Who in an organization do you typically call on?"

- CEO, executives, or someone at the level (or higher) that you need them to be calling on

"How do you normally get to that person?"

- If calling high up now, listen for something creative here

"If you have trouble getting to the decision maker, what do you do?"

- "I keep trying" and/or listen for creativity. You don't want any type of calling on lower levels accepted.

### **3. Need for Approval**

Often times, salespeople are in sales because someone along the way told them, "you're such a 'people-person' you should be in sales." Often these people have gotten by in life by being friendly, outgoing, and positive. Though they're pleasant, salespeople who possess these traits often rely on their personality to close business, thinking their personality is the reason people will buy from them. When this is the case, if the salesperson isn't properly trained, he will often try to please his prospect with bonding, giving them the reins and allowing the prospect to be in charge of the relationship. This type of salesperson truly believes a person will buy from him if he can just get them to like him.

A weakness in this area will show itself in an over-abundance of unqualified meetings, yet very little business closing. When asked why this is occurring, the salesperson will be very enthusiastic and say things like "they really liked me/us and they'll let us know their decision soon." Unfortunately, you'll never know if they're a true prospect or just a "suspect" because the salesperson won't be able to ask the tough questions and get the answers to determine this.

JP has a healthy desire to be liked, but he doesn't allow it to control the way he does business. JP recognizes the things that may change the way the prospect feels about him, but does not let his need to be liked overpower his need to close the sale. Because of JP's understanding of this, asking personal or uncomfortable questions and keeping to the price without discounting is not a problem for him. A weakness in this area will cause JP to avoid "touchy subjects" when talking to a prospect, which could possibly prevent closing the sale.

JP should be able to:

- Ask the tough questions
- Bring closure to a situation or identify a clear next step
- Won't accept "wishy washy" statements
- Deal directly with stalls and objections
- Understand that they aren't being rejected personally
- Hang in there when the going gets tough

If interviewing, recommended questions:

"How do you build relationships with your prospects?"

- Listen for an attempt to read the prospect somehow. If they say something like "I ask about their kids" or a generic "this is what I always do" type of answer, they are attempting to bond just by doing what would work for them if they were the prospect, and not attempting to read the prospect.

"How often will a prospect buy from you if they don't seem to bond with you?"

- You're looking for something along the lines of "they don't have to like me; it's about the value to them."

"What happens if you feel a prospect just doesn't seem to like you/bond with you?"

- "Well I hope they do, but as long as they respect me and see value, that's alright."

#### **4. Relationship Building**

What often happens when we try to bond with prospects (and people in general) is we bond by doing what we think is the right way to build a relationship. For example, if a salesperson personally enjoys talking about things relating to family, hobbies, etc, then he will do that with someone he doesn't know and/or are meeting for the first time. We tend to do this because we assume that the prospect's style of relationship building is the same as ours.

It is important to build relationships; it is also important to understand how to build them properly. People relate to others in many different ways, and a good salesperson with strong relationship building skills knows how to mirror his prospect to make them feel comfortable. A good salesperson should be able to read the other person and be chameleon-like in how they speak and in their body language, ultimately conveying a sense of good rapport.

Often salespeople are great at building relationships with people that are like them, but have trouble bonding when it comes to dissimilar personalities. If you see the sales rep going back to a person with a similar personality that they already know and are comfortable with and avoiding those they're not, it shows a weakness in their ability to build relationships.

JP typically bonds well with different types of people, but may sometimes have difficulties, slightly impairing the ability of his prospect to get comfortable with him and his company. JP may sometimes understand that everyone doesn't like things presented the way he does. For example, if JP is a big picture thinker and he is presenting to a very detail oriented prospect, JP generally knows that details are necessary in the proposal; however, he does sometimes miss the bonding connection between them, especially when uncomfortable, by assuming the prospect wants "just the big picture" with no details to follow because that's what JP would want. The prospect may then not fully understand the recommendation and possibly dismiss it as the wrong solution, sometimes causing JP to miss the sale opportunity.

JP may not be able to:

- Help the prospect to relax
- Create a feeling of equality
- Display believable trust
- See when they are not successfully bonding with the prospect and adjust their

approach accordingly

- Address issues and objections up front

If interviewing, recommended questions:

"If you are calling on someone that seems to have a different personality style than yours (laid back, detailed, outgoing, quiet, etc), what do you do to bond?"

- Shift personality style to mirror/match the prospect.

### **5. Vulnerability to TIO (Think it Over)**

There is nothing more damaging in sales than a 'think-it-over.' Think it over is almost always an excuse for a 'no.' If a salesperson is comfortable with 'no,' then he is much more likely to get a 'yes.' As much as the salesperson doesn't want a 'no,' the prospect is much more likely to make some sort of an excuse (send me something, call next month, etc.) than to commit, even when they're not really interested. This causes the salesperson to believe and accept the 'think-it-over' as a possible sale in the making and chase the prospect. It starts with an email, then a voicemail, etc, over and over again. Not only is this ultimately wasting time and money, it makes the salesperson appear desperate in the eyes of the prospect, which is never good.

There are several reasons why salespeople accept a 'think it over.' The most prominent reason TIO is accepted, is due to the belief that it's better to get a TIO than nothing at all. This couldn't be further from the truth. When a salesperson can give 'no' as an option and can come to terms with accepting it as a viable answer from their prospect, they immediately command respect.

If the prospect really does need to TIO, the salesperson should be able to identify a clear next step. A 'clear' follow-up plan includes a date of when the follow-up will take place, a time frame for the meeting, and an agenda of what will happen when the follow-up occurs. This not only makes the follow-up significant in discerning a suspect from a prospect, it gives a reason and agenda for that next contact.

A vulnerability to TIO will also reflect in the salesperson's own buying style. If someone likes to shop around for the "best deal," especially when it comes to a larger purchase like a car or electronics, they will be okay with their prospect doing the same. Therefore, if a salesperson hears from a prospect, "I really like your product/service, but since I haven't really looked around, I will need some time to think it over..." they will often not see that as a potential red flag. Their subconscious is saying, "makes sense to me, that's what I would do." This may very well be the truth for them, but most likely, it's an excuse from the prospect that they won't catch if they share this belief.

The way we sell is a direct reflection of the way we buy. JP only sometimes likes to shop around for the "best deal" himself, and therefore only occasionally accepts an "I'll



think it over" without testing to see if that really means no or questioning why. JP is typically able to create a clear next step in the sales process. Therefore, he seldom finds himself chasing the prospect, rarely wasting time with someone who could just merely be shopping. In addition to a one-call close, JP may have difficulty in moving a sale along in a timely manner which will not only lengthen the selling cycle, but with every passing day, makes the chance of closing the sale much less likely.

JP may not be able to:

- Get a commitment for every step of the process
- Be comfortable with and will accept a 'no' or a very clear next step but will not accept a 'think-it-over.'
- Always understand what will happen next
- Close every time, either in terms of the sale or a clear and concise next step that all have agreed upon
- Truly find out the conviction level of the prospect
- Send a recap email that clearly states all of the issues and the next step that both parties have agreed upon

If interviewing, recommended questions:

"What do you do if a prospect says they need time to think it over?"

- Look for a healthy level of tenacity

"How long of a selling cycle did you have in your last position?"

- Needs to be the same as or shorter than yours

Make sure you tell JP that you need to 'think it over' and you'll get back to them. This is JP's opportunity to "sell" himself for the position - see how he does.

## **6. Desire and Commitment**

Desire is the "hunger" for success and commitment is the willingness to do whatever it takes to get it. Success is the ultimate payoff. The goal is always within reach and if it's not, the salesperson that possesses these qualities will figure out how to get there.

If someone has the burning desire to be successful and is dedicated to do what it takes to achieve their goals, it can often times be the deciding factor in hiring them (depending on how weak the rest of their assessment reads). We often get caught up in "past experience" when it comes to hiring. We tend to put more emphasis on what the salesperson has done in the past and not their attitude. You can teach someone about your product/service (in most cases), but you can't alter their attitude. Desire and commitment are both innate qualities; they simply can't be taught.

JP shows a very strong desire, meaning that he will always follow through with what they set out to do, even when the going gets tough. JP will do whatever it takes for you

to meet your goals and prides him self in achieving them. He does not make excuses for his shortcomings. JP will always take personal responsibility for his work.

We typically like to see 100% here. If there is a weakness in this area, I would think very seriously about employing JP. Without desire to be successful and the work-ethic to make it happen, JP's employment would only fall into a downward spiral.

JP should be able to:

- Set and reach goals, no matter what
- Make no excuses for lack of results
- Take risks to get where they need to be to succeed
- Self-motivate
- Believe they are a winner

If interviewing, recommended questions:

"Why should I hire you?"

- More than anything, you're looking for confidence in the answer they give

"What's your plan for making money in this economy?"

- Some type of prospecting plan is what you're listening for. They need to immediately think "build new business" and that's the toughness you're looking for.

"Why did you leave your previous job?"

- You want to be sure they decided to leave and weren't "laid off." "Looking for a better opportunity" is the best answer.

You are looking for excuses. Even "I was laid off" can be an excuse because a salesperson is considered an asset, not a liability; therefore, you wouldn't let go of a money-maker.

## **7. Goal Setting**

Goal setting and desire and commitment are often intertwined. If goals are set, written and feverishly pursued, that shows strong desire. Goals can't just be in the salesperson's head; they don't become real unless they are written and continuously updated and tweaked.

From the book: "What they don't teach you at Harvard Business School" by Mark McCormack:

In his book, Mark McCormack talks about a study conducted on students in the 1979 Harvard MBA program. In that year, the students were asked, "Have you set clear, written goals for your future and made plans to accomplish them?" Only three percent of the graduates had written goals and plans; 13 percent had goals, but they were not in writing; and a whopping 84 percent had no specific goals at all.

Ten years later, the members of the class were interviewed again, and the findings, while somewhat predictable, were nonetheless astonishing. The 13 percent of the class who had goals were earning, on average, twice as much as the 84 percent who had no goals at all. And what about the three percent who had clear, written goals? They were earning, on average, ten times as much as the other 97 percent put together.

In spite of such proof of success, most people don't have clear, measurable, time-bounded goals that they work toward.

JP has a real problem with goal setting, indicating that he will have a real problem being successful. Without clear goals and a road map to reach them, it will be nearly impossible for JP to achieve success. Therefore, reasons for not closing business are not known and blaming comes into play more than taking responsibility. Additionally, JP will get burnt out from working hard and not smart.

JP will not be able to:

- Put goals on paper and stick to them
- Develop an action plan of how the goals will be carried out
- Follow those plans and action steps consistently
- Debrief and update goals regularly
- Commit to the goals and internalize them

If interviewing, recommended questions:

"What are your personal goals?"

- They should be able to recite these quickly (b/c they should already be established) and not make them up as they go.

"Where are they written?"

- This is more about making sure they are written down and not just in their head

"When's the last time you didn't achieve a goal you set? What happened?"

- Either "that's never happened" or "I tweaked it so it was more reasonable" are what you're looking for. Listen for excuses.

## **8. Prospecting**

Prospecting is the ability and/or willingness to keep the prospect funnel full with potential business. Often salespeople fall into the "prospecting when necessary" syndrome. This translates into the salesperson prospecting only when their available pool of potential new business clients begins to dwindle. The problem here is twofold.

The first issue with sporadic prospecting is the creation of the dreaded "desperate salesperson." Think about it. If the salesperson is only prospecting when they "need" business, they will tend to become desperate, and this desperation will be obvious to the potential client. This desperation will greatly diminish the ability of the salesperson to

be in control of his/her sales calls, if not eliminating the ability completely. Closing the sale then becomes extremely difficult because the salesperson is coming from a place of weakness.

The other issue with infrequent prospecting is the presence of "roller-coaster" sales months. This tends to happen when a month of hard prospecting leads to new business. That will reflect in the numbers in the following month. However, when the "backend" work of starting a new client keeps your salesperson from prospecting the next month, it too will show in the numbers (hence, the sales roller-coaster terminology).

It's a common misconception that prospecting is the same as cold calling. Nothing could be farther from the truth. JP has an issue recognizing that his prospecting goal isn't necessarily just to close business, but to qualify potential clients and begin building relationships. Employing this qualification is essential in separating "suspects" from true prospects.

JP likely has a hard time filling the prospect funnel with potential business. Because JP has little to no established process for prospecting, results are typically either by luck, inconsistent (up one month, down the next), or none at all. He doesn't have a strong ability to estimate what is truly projected to come in. When JP does have a few good months and closes some business, he may have to "start all over" by looking for brand new prospects to fill the funnel, often resulting in business income inconsistency, and sometimes even desperation, which a prospect can detect from miles away.

JP likely is not able to:

- Identify and set reasonable activity goals
- Attain the activity goals set
- Learn something from every call/appointment
- Develop a proactive plan for getting referrals

If interviewing, recommended questions:

"What do you do on a regular basis to prospect?"

- They should be able to recite a plan of action

"What have you found works best when it comes to prospecting?"

- There should be some type of cold-calling involved. Though it may not be the most effective, the fact is they're willing to cold-call, showing they have guts and that they understand the importance of quantity early on.

## **9. Bravery**

A salesperson shows his confidence level through bravery. Confidence is one of the most important aspects of being successful in selling. We frequently misunderstand a salesperson being outgoing and friendly as confidence; this is not necessarily true.

Often a person is attracted to sales because they see themselves as a "people person." We as hiring managers can fall for this trait and ultimately not understand why this person seems to be busy with appointments but have very few people actually closing.

The ability to say and do what you need to is one of the most important aspects of being a professional salesperson. When/if a prospect says something that doesn't seem right or brings up a 'red flag,' the salesperson should be able to ask for clarification to truly understand what the prospect means by their statement.

A person with a high level of bravery will not allow misunderstandings to occur without addressing them. Bravery will push the salesperson to do and ask all that they need to in order to reach a positive outcome (and remember, a 'no' can be a good thing). With bravery, the salesperson will have a shorter selling cycle and won't fall into deeply discounting their product/service.

JP is willing to do whatever it takes, even when it's tough, to get the job done. Because of this, JP is always in charge of the selling process. Bravery also aides JP when it comes to saying the right thing. Tough questions are never an issue for JP. When it comes to the real issue, he will always ask enough of the right questions to truly get to the core. JP would be an asset in a "hunting" position. A weakness here may cause JP to allow the prospect to control part of the selling process.

JP should be able to:

- Take personal responsibility for all that happens and looks first internally to solve the issue
- Not blame external issues (i.e. the economy, existing relationships, price, etc)
- Accept challenges
- Avoid making excuses
- Learn from every situation and not believe they "know it all"
- Understand that "no" doesn't equal failure
- Be unaffected by what others think

If interviewing, recommended questions:

"We're looking at several qualified candidates. Why you?"

- Look for them to compellingly sell themselves. Their confidence (or lack thereof) should be apparent.

"I don't know if we're going to be able to meet your salary/base pay requirements. What do we do?"

- They need to show some guts here. If they are ok with making less, then they will be okay with a prospect paying less for your product/service.

## **10. Sales Process**

A process will give a salesperson confidence. If confidence can be instilled in a sales person, he would not allow the prospect to take over. He could say what he needs to say and do what he needs to do to successfully close the sale. The process the salesperson follows should include the following;

- Some sort of "ground rules" should be set. Prospects are often uncomfortable with salespeople because they don't have a plan for the conversation. A prospect likes to have an agenda (not necessarily in writing) of what will be covered.
- One of the most important parts of a sales process is asking questions. Salespeople generally ask a few brief questions, and then move very quickly into their presentation. If they are properly using a process, they will keep asking questions until they uncover the prospect's real issues and will then be prepared to present properly.
- Discussing the prospect's budget and/or the cost of your product/service is very important to execute before a salesperson gets to the presentation stage. Most salespeople do a poor job at this stage in the game. If cost/budget is not discussed until late in the game, it becomes the only thing the prospect is focused on when they see the proposal/presentation.
- Follow-up. If the sale is not going to "close" in one meeting, following up is imperative to ensure everyone is on the same page with what the next meeting will entail.
- Recommendations need to feel customized to the prospect. A successful sales person knows how to take all that they learned and present recommendations only based on the prospect's needs.

Without a process, the salesperson has a tendency to follow the prospect's "process," which is typically formulated as "talk to the representative, gather information, ask for a proposal, negotiate a steep discount, and then begin the 'stall' game." If the salesperson is not able to control the process, the prospect will be in control of how the sale moves forward. The prospect will decide what/when the next step is, how much they are willing to pay, when/if they will work with you, or if they will use the information you gave them to negotiate with another vendor.

JP may partially employ a sales process when selling to a prospect, but could have an incomplete understanding of what the process should consist of. A process consists of things like getting past the gate keeper, turning introductions into appointments, consistently getting to the "real issue," and having a clear next step for the salesperson and prospect. Because JP may struggle with these issues, he may sometimes fall into the "let me think it over" cycle. When a prospect says they want to "think it over," JP could occasionally feel compelled to give some free consulting. JP may periodically spend unnecessary time putting together elaborate proposals or presentations that may not result in sales.

JP may not be able to:

- Take the organization's capabilities and translate this information into questions to elicit the real issues
- Ask the tough questions
- Help the prospect to quantify their issues for them

- Know when to "bail out"
- Understand the importance of getting the budget and knowing what it is
- Discover the prospect their prospect uses to make decisions
- Grasp the true probability of the sale and if/when it will close

If interviewing, recommended questions:

"Share with me the process that you are currently using, from the initiation of the contact to closing the sale."

- The salesperson should be able to articulate some sort of process. It should include:
  1. A plan for prospecting
  2. Questions to ask their prospect (and when in the process they will be asked)
  3. A time when they talk about budget/cost
  4. A follow-up plan (for their next step) and/or
  5. How/when recommendations will be presented (customized to what the prospect said was important to them)

"How long does this process typically take you?"

- This time frame should be comparable to or shorter than yours

"Why is this often the timeframe?"

- Make sure their answer addresses that they are in control of the length of time, not the prospect