



Report designed for

Sally Sample

Sales CheckPoint Performance Feedback System™ Individual Comparison Report

Report Prepared: January 2, 2013

CONFIDENTIAL

Current Survey Completed: December 21, 2012

This report includes responses from:

Salesperson and Sales Manager

Sales Manager – Leader, Lester

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Previous Survey Completed: December 20, 2011

This report includes responses from:

Salesperson and Sales Manager

Previous Sales Manager – Leader, Lester

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The Sales CheckPoint

The purpose of the Sales CheckPoint is to identify sales behaviors as viewed by you and your Sales Manager. 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 your Sales Manager provided 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

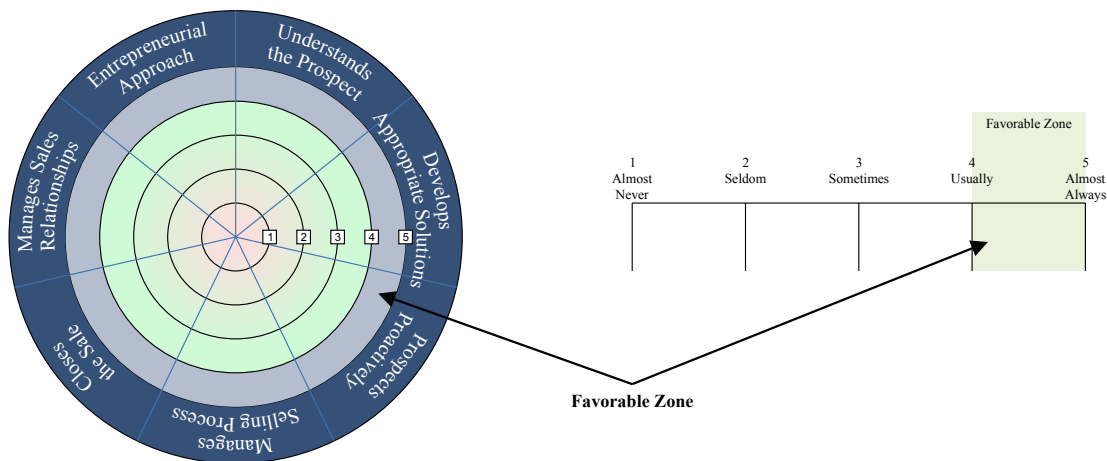
7. Manages Sales Relationships

- 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 Individual Comparison Report

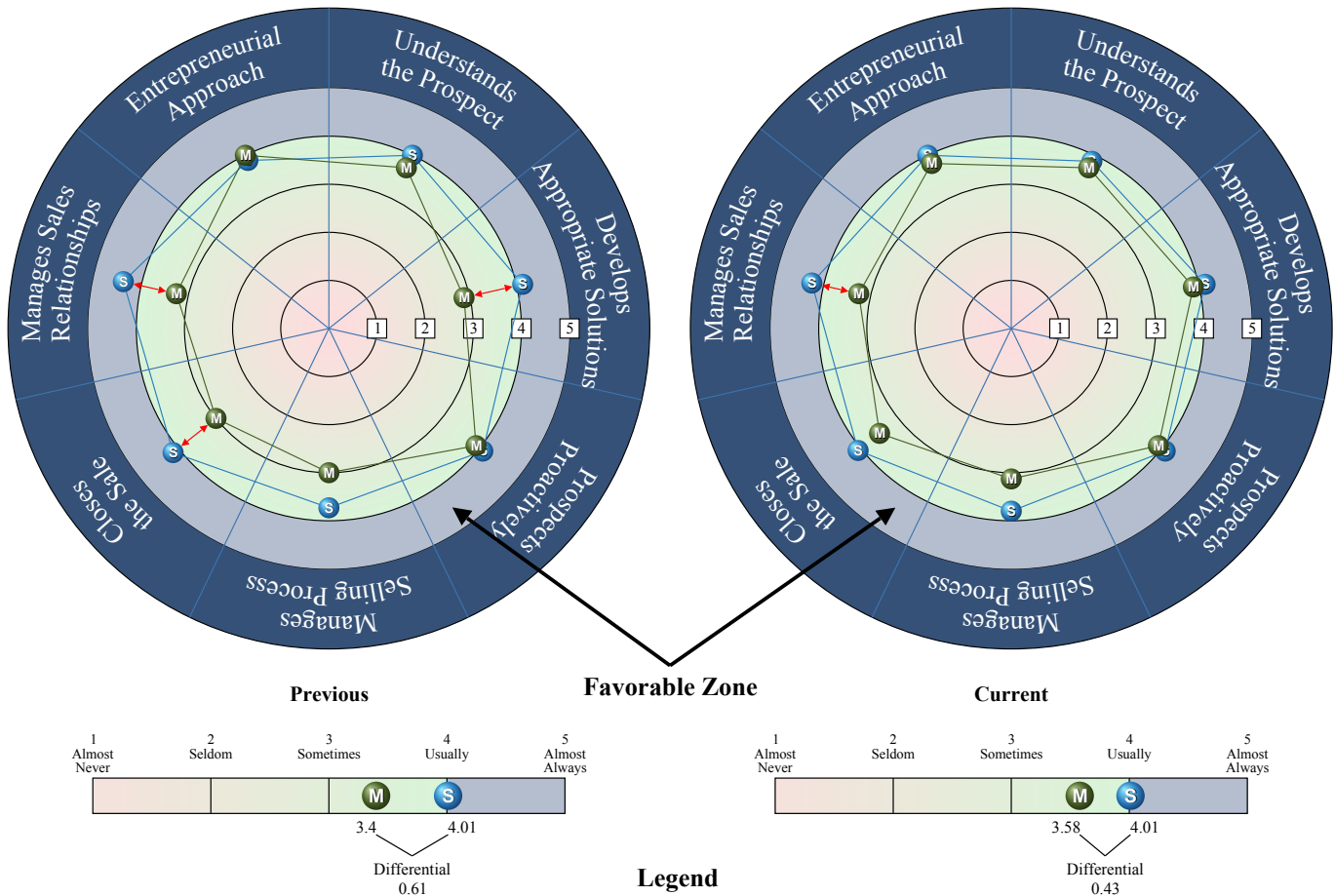
This report summarizes the results of the Sales CheckPoint surveys that you and your Sales Manager recently completed. The scores you received are presented in graphs and numeric scales on the pages that follow.

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 your Sales Manager and show whether scores fall within or below the Favorable Zone. Also shown are the Total Sales CheckPoint Scores, including the score differential between you and your Sales Manager.
- **Skill Set Summary**: Overview of the 19 Skill Sets as rated by you and your Sales Manager. The average ratings are displayed ranked from highest to lowest of the most recent scores for both of you. The ratings from your Sales Manager are shown in the first group while your ratings are in the second group. This provides you an overview of the relative strengths or challenges in these Skill Sets.
- **Critical Skills Alignment Summary**: Overview of the Skill Sets identified as critical by you and your Sales Manager.
- **Executive Summary**: Results for the 7 Universal Sales Competencies, comparing the average scores of both you and your Sales Manager 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 your Sales Manager, and pointing out score averages that vary by 1.5 points or more, as well as analyzing Critical Skill Sets to establish Talents, Areas of 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 your effectiveness in selling.)
- **Survey Summary of the 79 items**: Results for all 79 survey items, displaying the scores of you and your Sales Manager while highlighting the items that fall in a Critical Skill Set.
- **Development Summary Overview**: Describes your strengths and development needs for 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 your sales effectiveness. Of particular interest in many sections will be the ability to compare the results from the two different Sales CheckPoint surveys. Where a difference between the two average ratings exceeds 1 point there will be an indication with an icon (⚠).

Executive Competency Overview

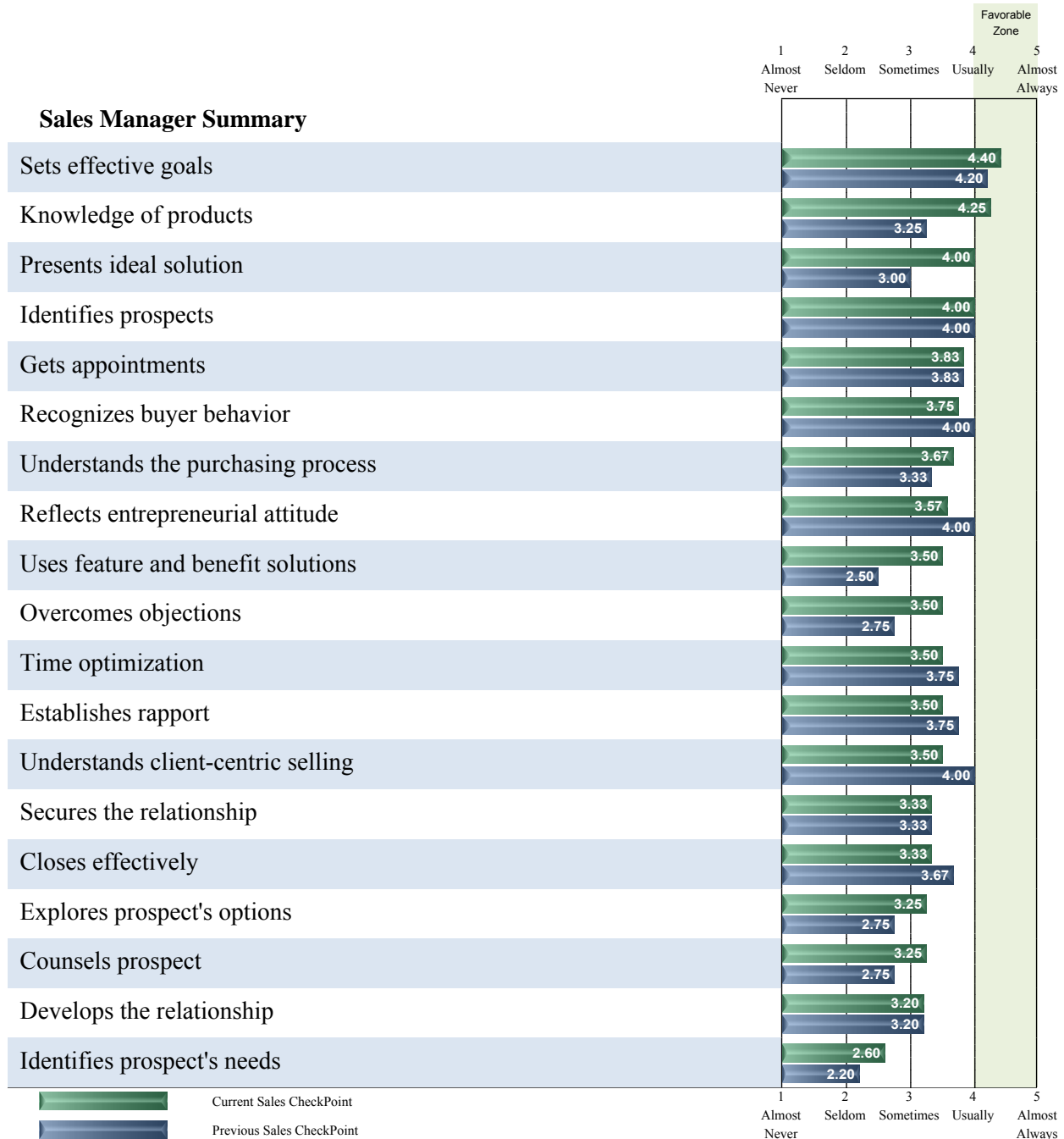


This is an overview of your average ratings compared to the average ratings of your Sales Manager for all 7 Competencies. Note particularly where there is a gap of 1 point or greater. This would indicate a significant difference between perceptions and suggests a need for discussions between you and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

Total Sales CheckPoint Scores reported on the smaller horizontal graph present the average score for all 7 Competencies for you and your Sales Manager. Again, a gap of 1 or more is a call for discussion between you and your Sales Manager 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 your Sales Manager. The average ratings are displayed in ranked order from highest to lowest based on the most recent survey providing you with the perception of your relative strengths in these Skill Sets as seen by your Sales Manager.



This graph shows the average ratings for each Skill Set given by you. The average ratings are displayed in ranked order from highest to lowest based on the most recent survey. This will give you a picture of how you perceive your strengths in these Skill Sets.

Salesperson Summary



Critical Skills Alignment Summary

You and your Sales Manager identified the 6 Skill Sets that you each thought were most critical for success in selling. These Skill Sets for both Sales CheckPoints are displayed below. Consider that the possible number of Skill Sets selected by you and your Sales Manager 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 your Sales Manager to discuss and clarify the most important aspects of your selling abilities. Unless you have both identified the same behaviors as critical, there will be a real potential for disagreement on where you should focus your activities. Also, look for any variance in which Critical Skill Sets were selected for each Sales CheckPoint survey. This could reflect a change in focus between the dates of the two surveys.

Previous

Critical Skills Alignment

M Lester Leader - 67%

Current

Critical Skills Alignment

M Lester Leader - 83%

| | | |
|----------------------|--|----------------------|
| S | 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. | S |
| M | Understands the purchasing process: Exhibits knowledge of the roles, goals, and processes of purchasing professionals and develops relationships with them. | S M |
| M | Uses feature and benefit solutions: Develops and offers solutions by communicating product characteristics and identifying how those characteristics will satisfy the prospect's needs. | |
| S M | Knowledge of products: Displays expert knowledge of products and services and uses this knowledge to quickly and effortlessly address a prospect's needs. | S M |
| S M | Identifies prospects: Recognizes the characteristics of ideal prospects and focuses time and activities on those with the highest probability of becoming good clients. | |
| | Understands client-centric selling: Recognizes prospect's needs and strives to make the buying process as easy as possible. | S M |
| | Identifies prospect's needs: Uncovers the real needs of prospects to increase the likelihood of making a sale and increasing client satisfaction. | S M |
| S 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 M |
| | Overcomes objections: Recognizes prospect's objections and provides clear and concise information to raise prospect's satisfaction level. | M |
| S M | Secures the relationship: Stays in front of client and prospect's needs and establishes opportunities to generate contacts and do more business with them. | |

Executive Summary

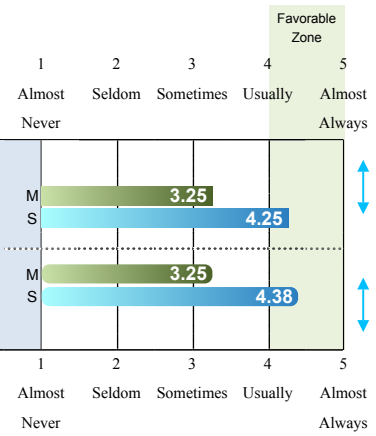
The average rating for you and your Sales Manager on the 7 Sales Competencies is presented in this section. The numbers shown are the average ratings. Note the differences between ratings, especially if there is a gap indicated (a difference of 1 point or more) for each survey. Additionally, note that when the current survey average ratings for one of you differs by .5 or more, there is a + or - to indicate the direction of that change.

- + Indicates a .5 or greater increase in average rating since the previous rating period.
- Indicates a .5 or greater decrease in average rating since the previous rating period.
- ! Indicates a 1 point or greater difference in average ratings since the previous rating period.



Manages Sales Relationships


Maintains prospect focus through the entire sales process and delivers solutions as promised.





Skill Set Analysis


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


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


 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.


 Ratings for Salesperson and Sales Manager





 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

 Indicates a 1 point or greater difference in average ratings since the previous rating period.

 Selected by Salesperson, Sales Manager, or Salesperson & Sales Manager as a Critical Skill Set.

 Indicates a .5 or greater increase in average rating since the previous rating period.

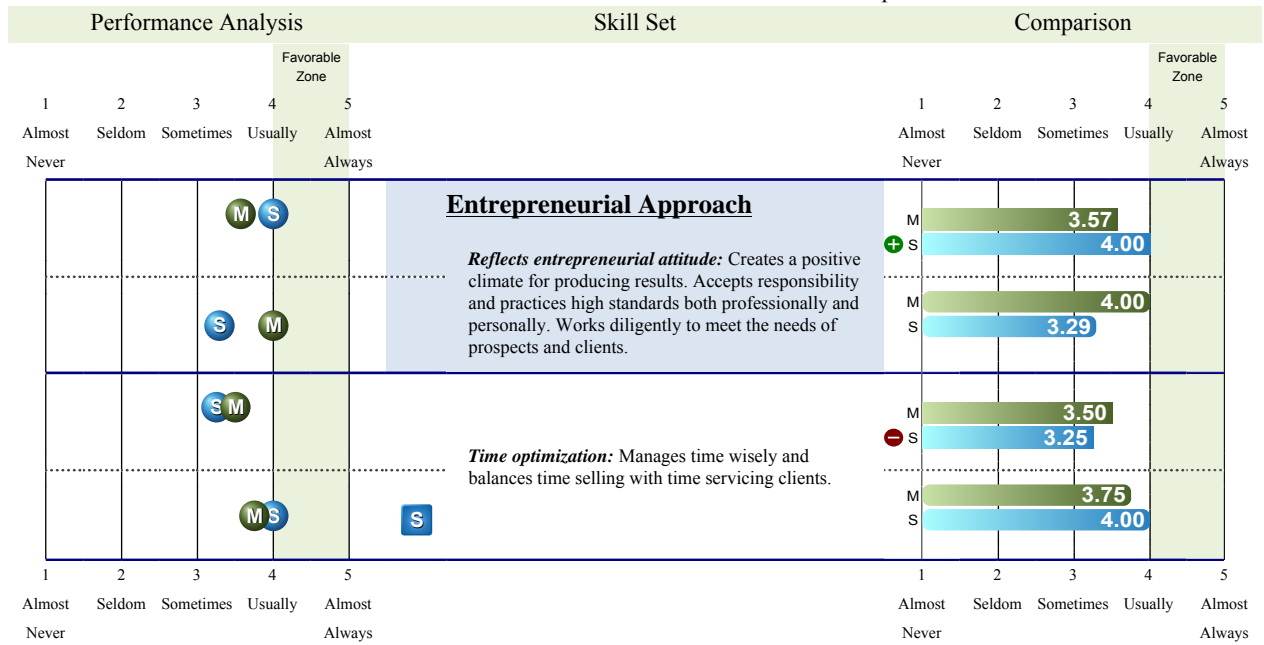
 Indicates a .5 or greater decrease in average rating since the previous rating period.

Current

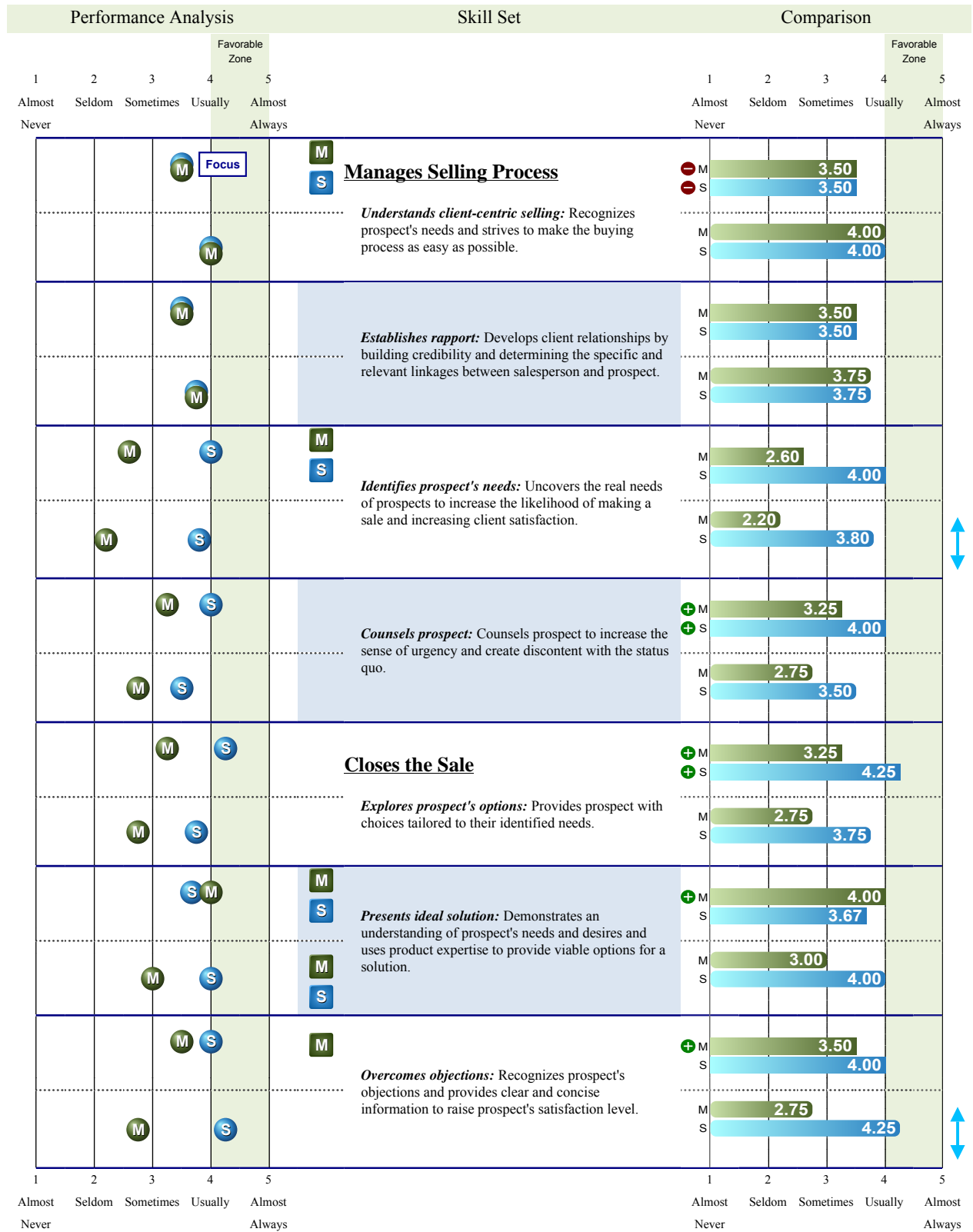
Previous

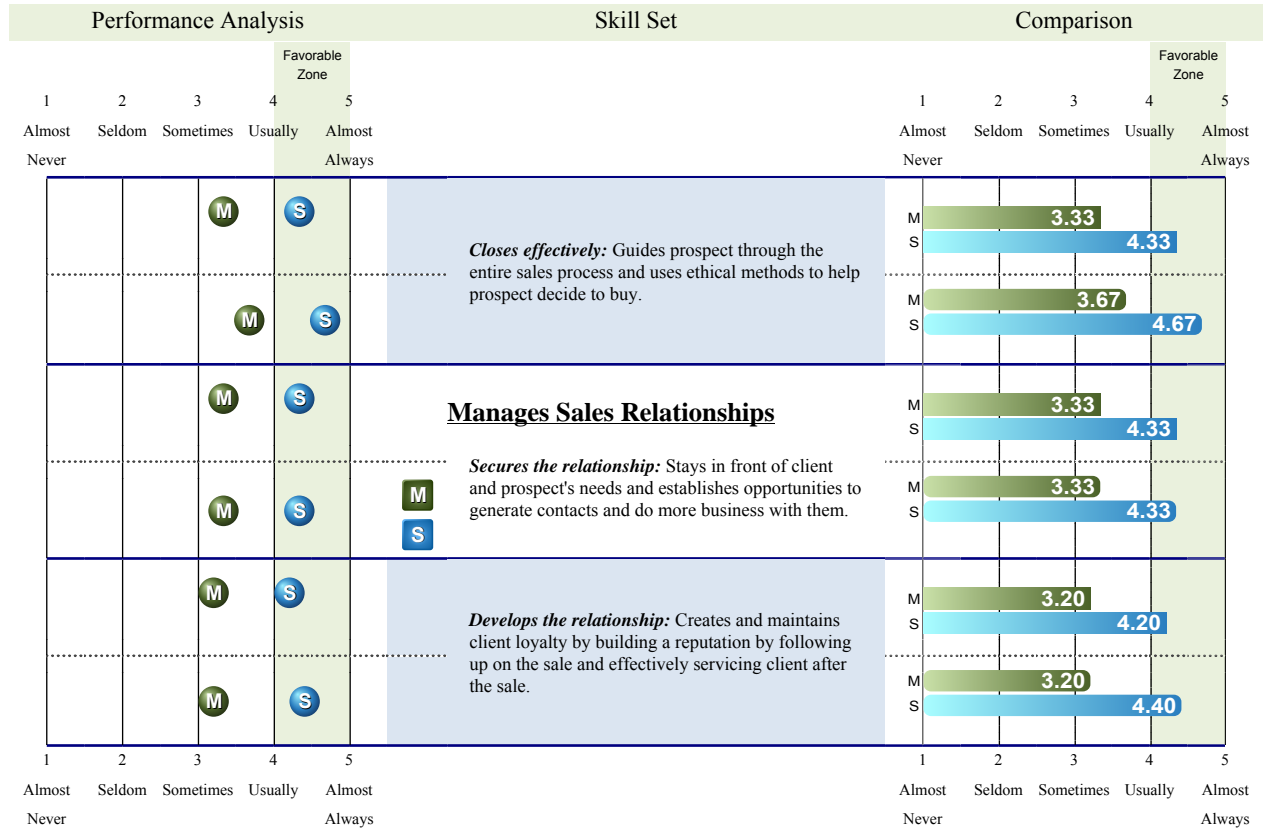
Sales Manager
Salesperson

Sales Manager
Salesperson











| Performance Analysis | | | | | Skill Set | Comparison | | | | |
|----------------------|--------|-----------|---------|---------------|--|----------------|--------|-----------|---------|---------------|
| Favorable Zone | | | | | | Favorable Zone | | | | |
| 1 | 2 | 3 | 4 | 5 | | 1 | 2 | 3 | 4 | 5 |
| Almost Never | Seldom | Sometimes | Usually | Almost Always | | Almost Never | Seldom | Sometimes | Usually | Almost Always |
| | | | M S | | Sets effective goals: Works to improve sales performance by establishing manageable and realistic goals and objectives, and pursues them in a systematic and efficient manner. | M 4.40 | | | | |
| | | | M S | | | S 4.60 | | | | |
| | | S M | Focus | | Understands the Prospect | M 3.75 | | | | |
| | | | | | Recognizes buyer behavior: Identifies reasons prospects buy products or services and uses this knowledge to enhance sales approach. | S 3.50 | | | | |
| | | Talent | M | | | M 4.00 | | | | |
| | | | | | Understands the purchasing process: Exhibits knowledge of the roles, goals, and processes of purchasing professionals and develops relationships with them. | S 4.00 | | | | |
| | | M | S | | | M 3.67 | | | | |
| | | | | | Develops Appropriate Solutions | S 4.33 | | | | |
| | | M | 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 3.33 | | | | |
| | | | | | | S 4.00 | | | | |
| | | M S | | | Develops Appropriate Solutions | M 3.50 | | | | |
| | | | | | Uses feature and benefit solutions: Develops and offers solutions by communicating product characteristics and identifying how those characteristics will satisfy the prospect's needs. | S 3.75 | | | | |
| | | M | S | Focus | | M 2.50 | | | | |
| | | Talent | M S | | Knowledge of products: Displays expert knowledge of products and services and uses this knowledge to quickly and effortlessly address a prospect's needs. | S 3.75 | | | | |
| | | | | | | M 4.25 | | | | |
| | | M | S | | Knowledge of products: Displays expert knowledge of products and services and uses this knowledge to quickly and effortlessly address a prospect's needs. | S 4.50 | | | | |
| | | | | | | M 3.25 | | | | |
| | | | | | Prospects Proactively | S 4.50 | | | | |
| | | | M | | Identifies prospects: Recognizes the characteristics of ideal prospects and focuses time and activities on those with the highest probability of becoming good clients. | M 4.00 | | | | |
| | | S | M | | | S 4.00 | | | | |
| | | | | | | M 4.00 | | | | |
| | | | | | Gets appointments: Develops and implements relevant, compelling, client-centric communications to support efforts of getting meetings with prospects. | S 3.60 | | | | |
| | | M S | | | | M 4.00 | | | | |
| | | | | | | S 4.17 | | | | |
| | | M | S | | | M 3.83 | | | | |
| | | | | | | S 4.50 | | | | |
| | | | | | | M 3.83 | | | | |
| | | M | S | | | S 4.50 | | | | |





Survey Summary of the 79 items

The ratings for each individual question are shown for easy analysis. The rating by both you and your Sales Manager for each individual behavior provides detail calling for study and possible coaching or training at a very specific level. Any gaps identified require immediate attention by both of you.

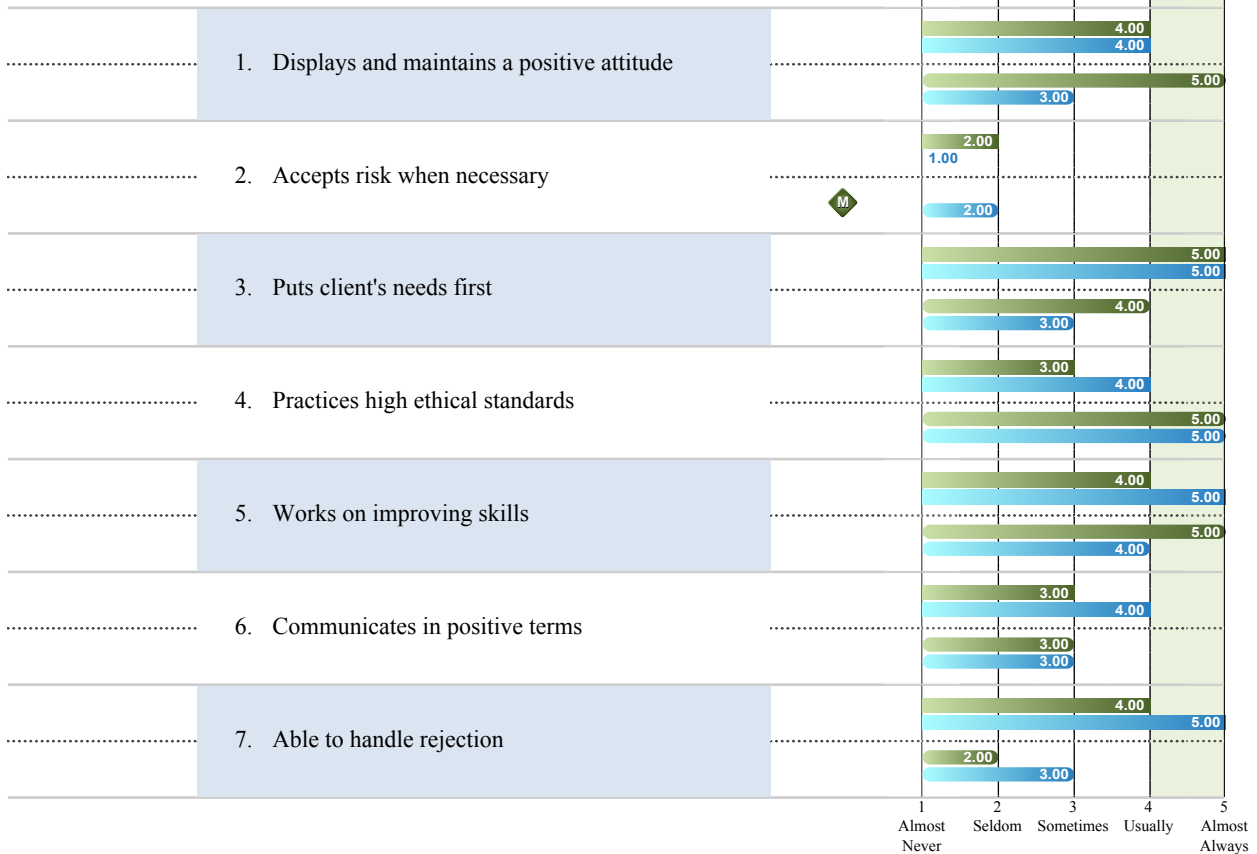
Current Sales CheckPoint   **Sales Manager**  
 Previous Sales CheckPoint   **Sales Manager**  

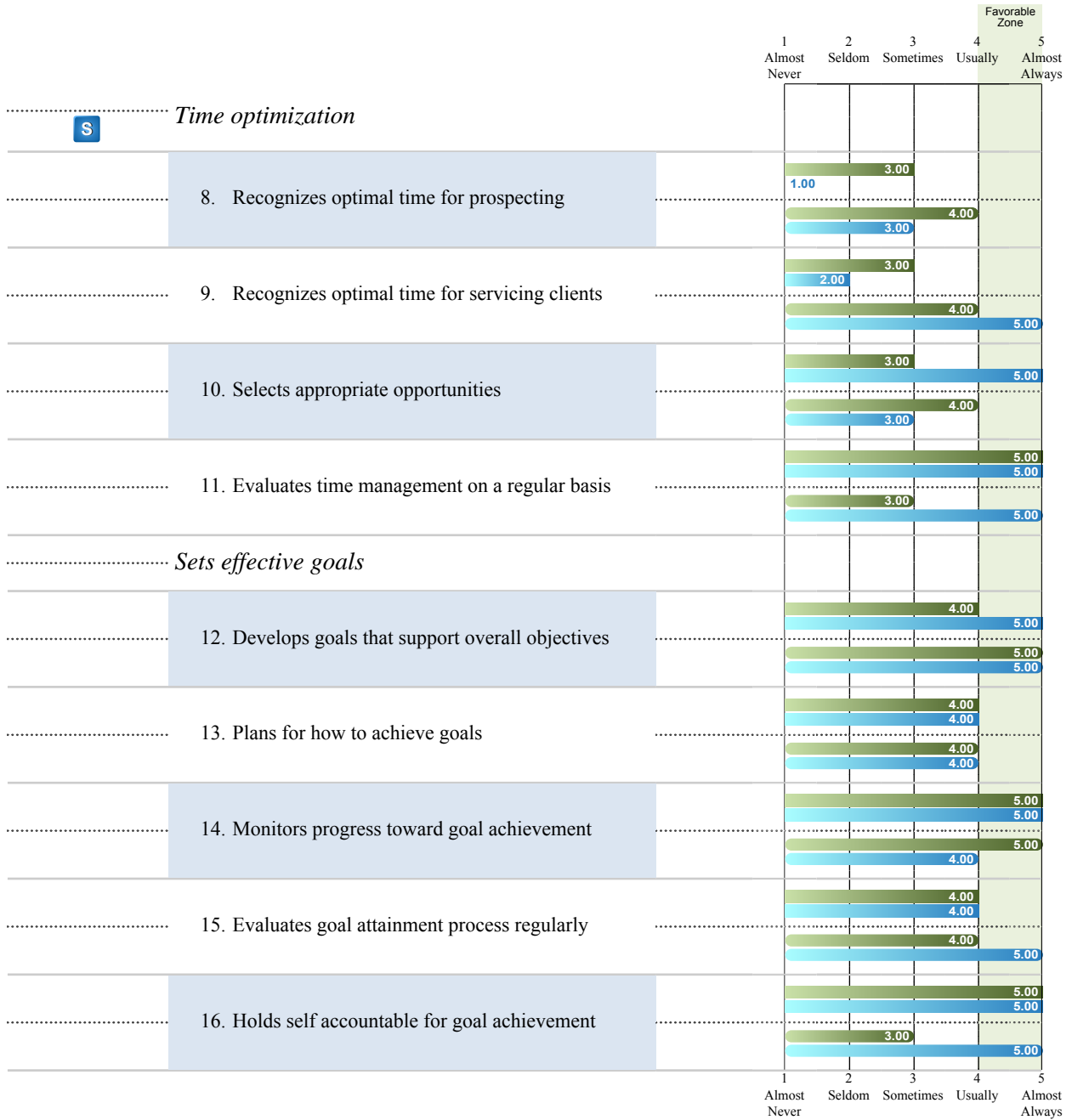
Sales Manager and/or Salesperson did not rate item **Bold Lettering:** Items that fall in a Critical Skill Set, as designated by Salesperson and/or Sales Manager

Color Key

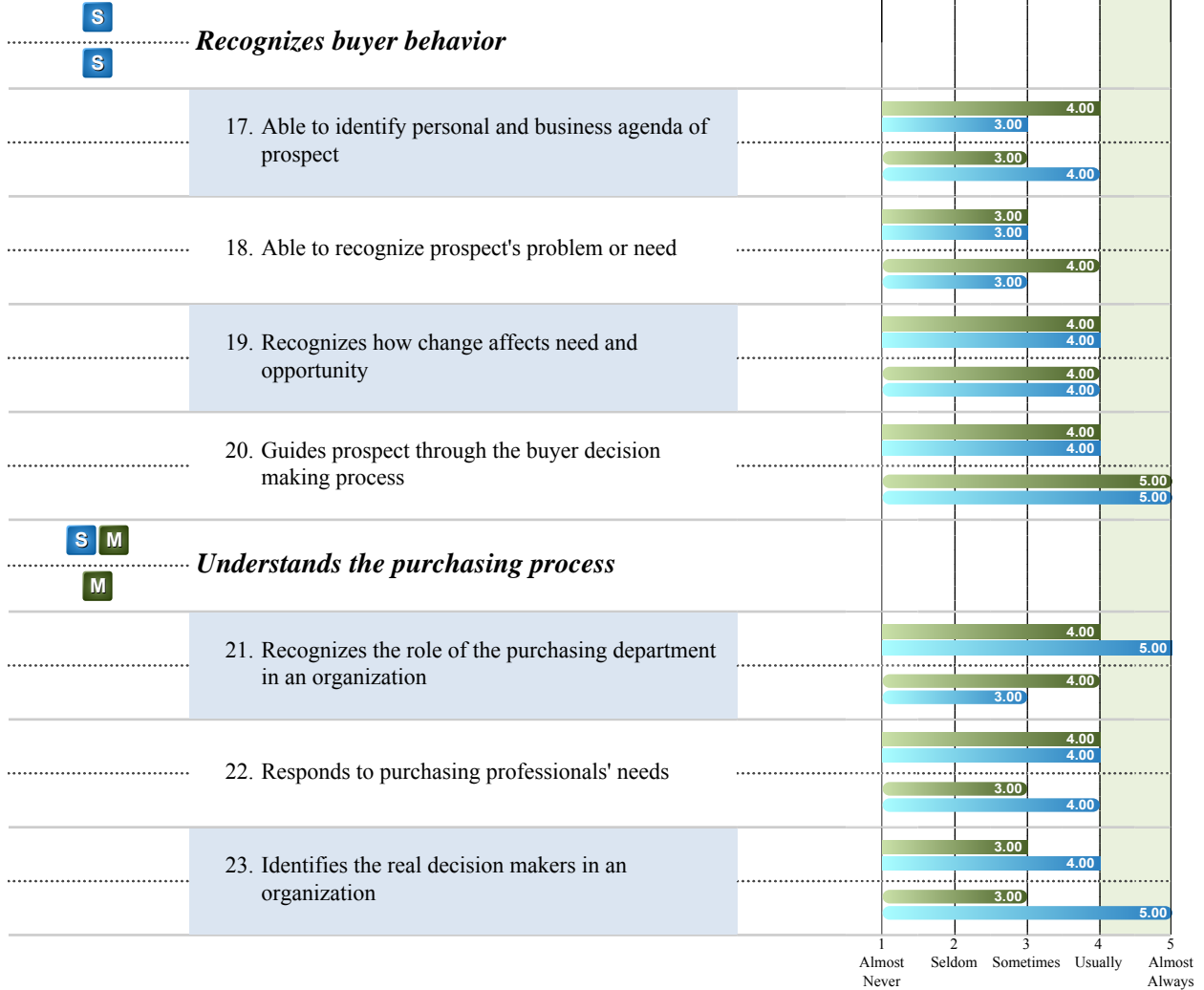
Entrepreneurial Approach

Reflects entrepreneurial attitude



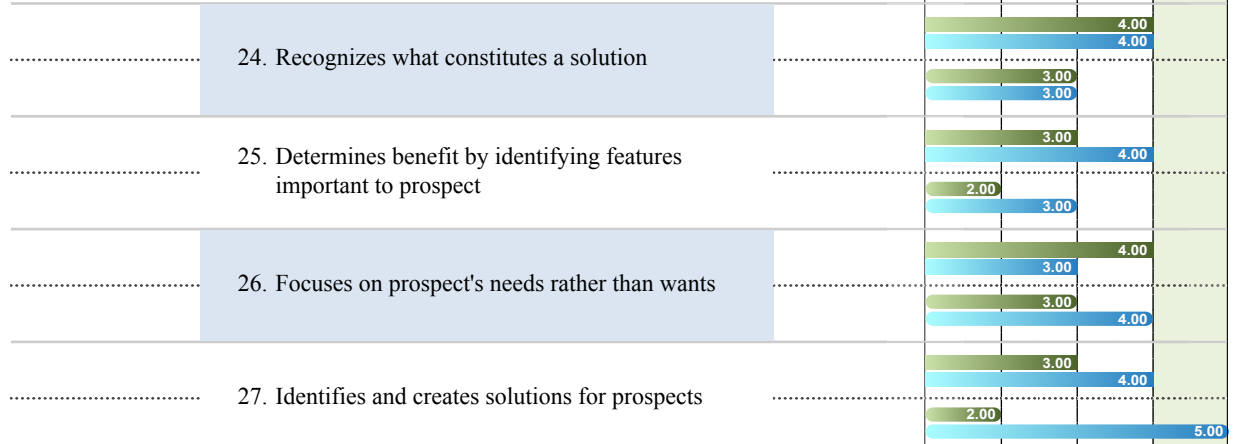


Understands the Prospect

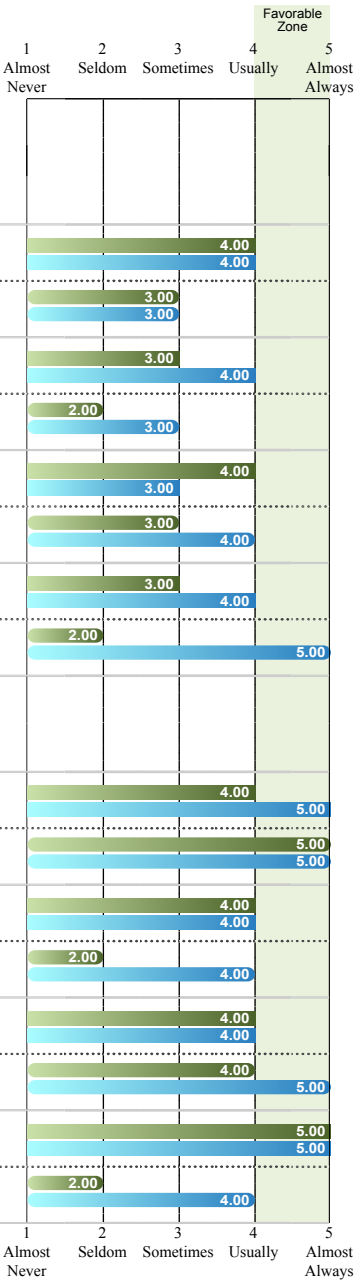
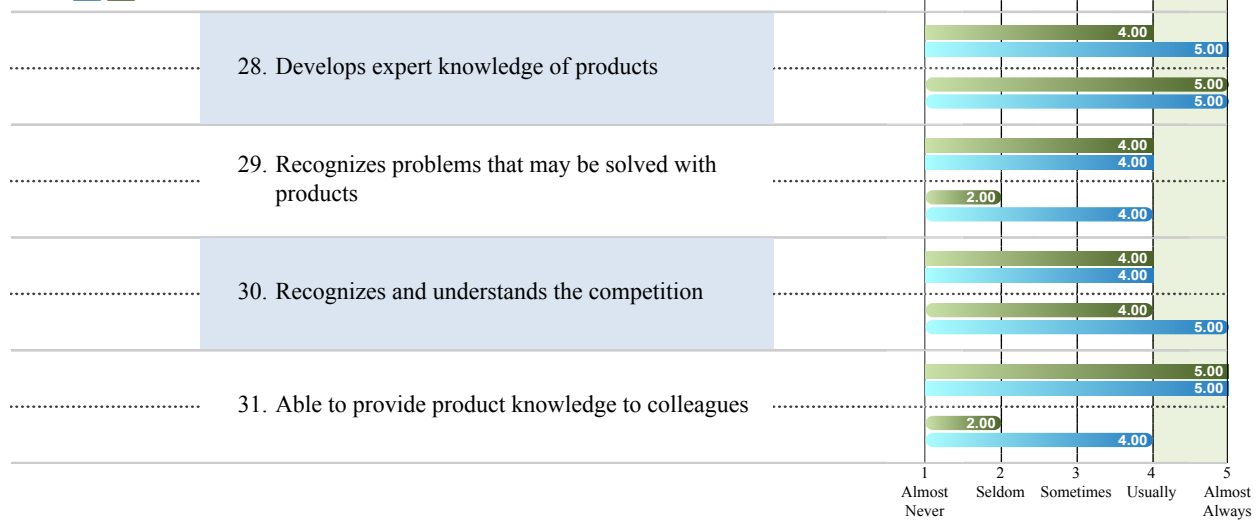


Develops Appropriate Solutions

M *Uses feature and benefit solutions*

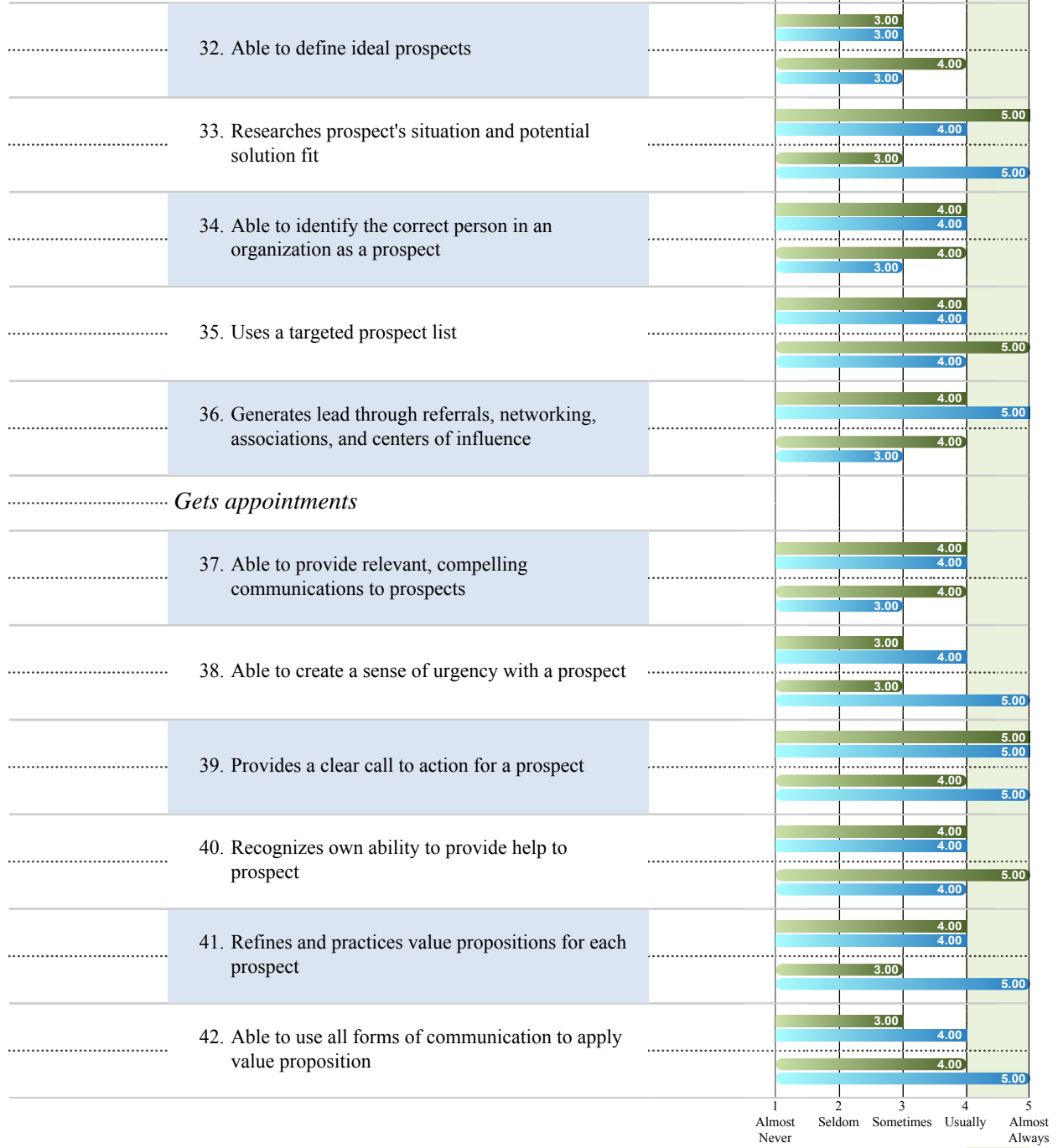


S M *Knowledge of products*
S M



Prospects Proactively

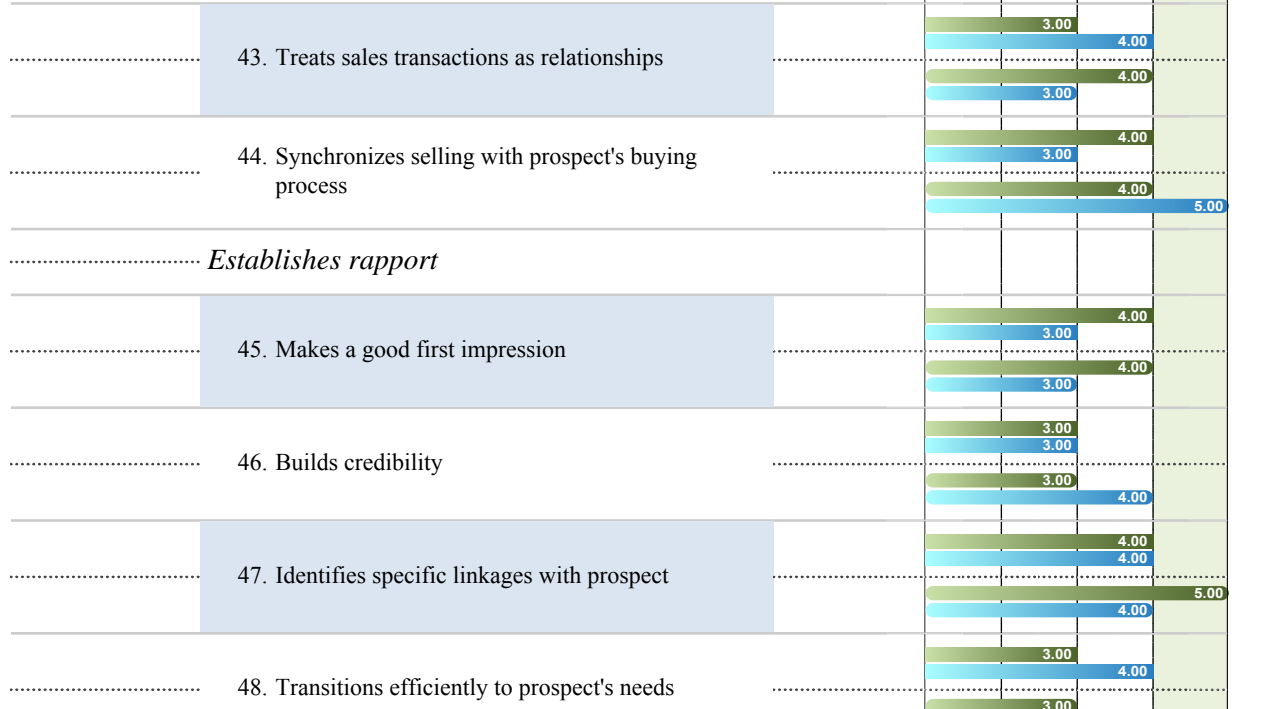
S M *Identifies prospects*



Manages Selling Process

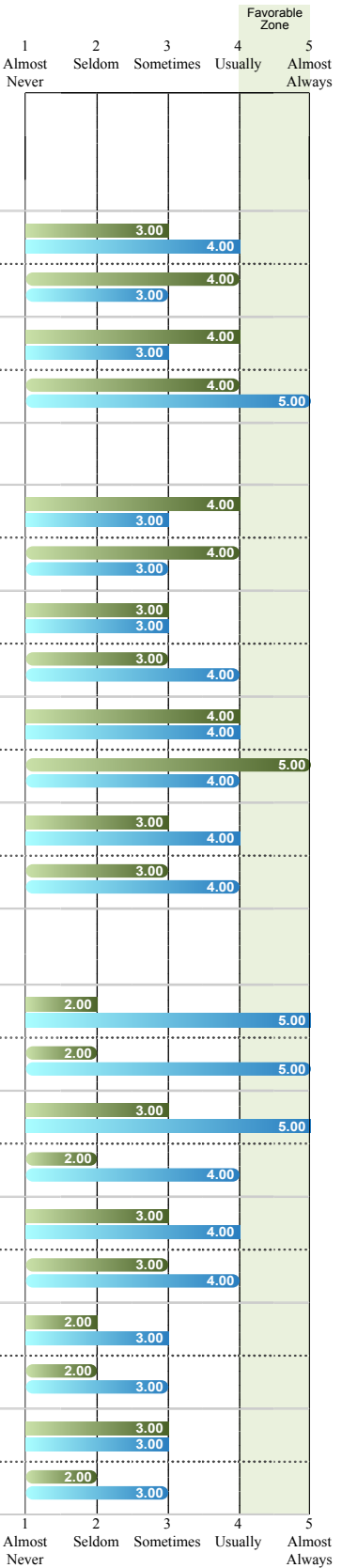
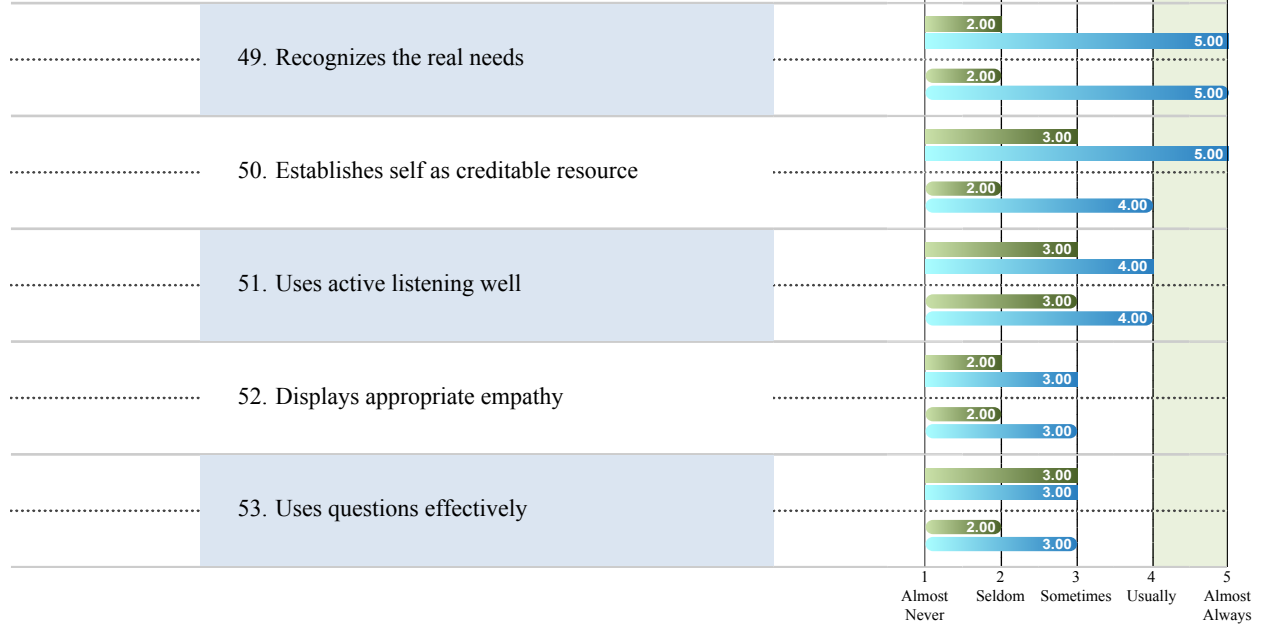
S M

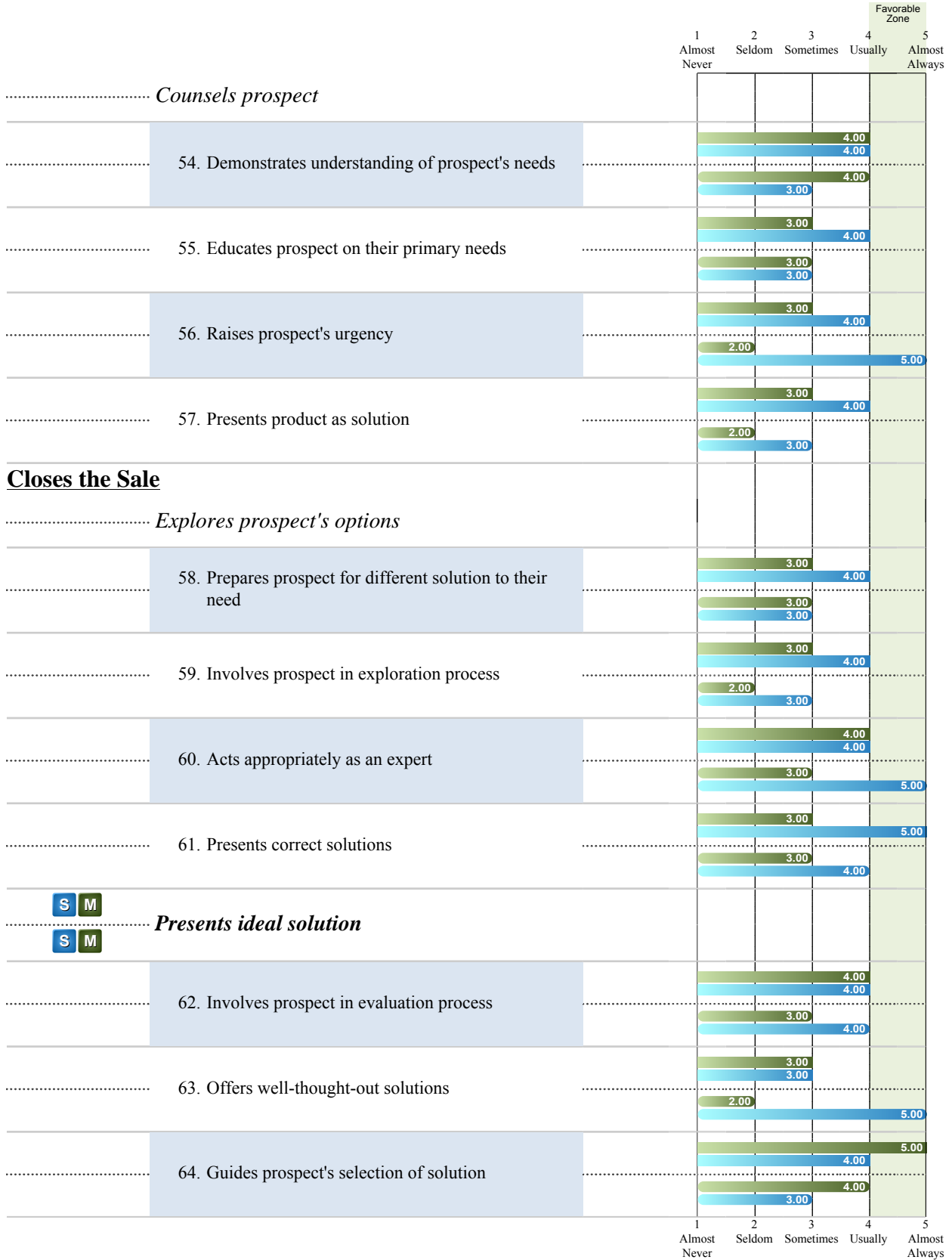
Understands client-centric selling

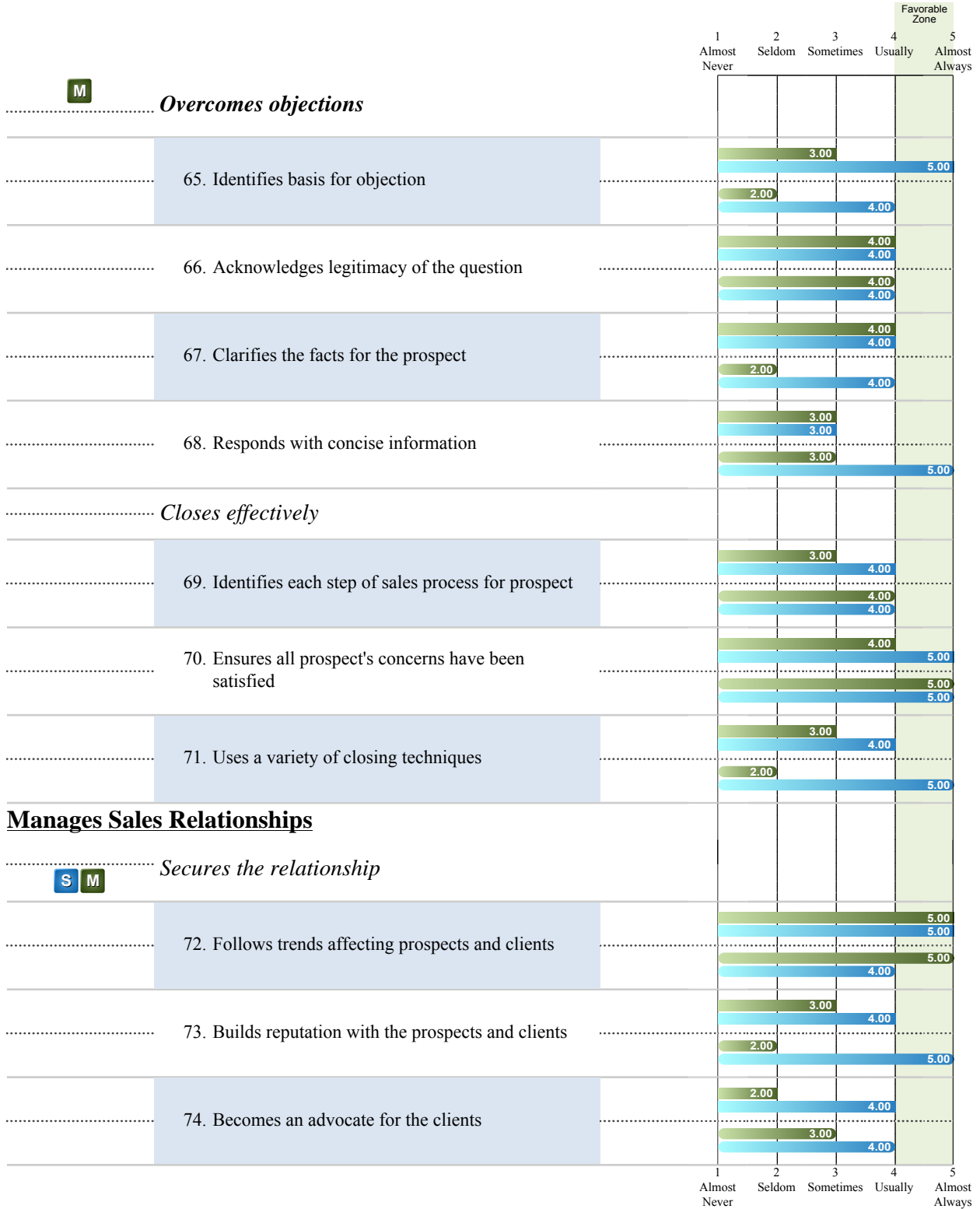


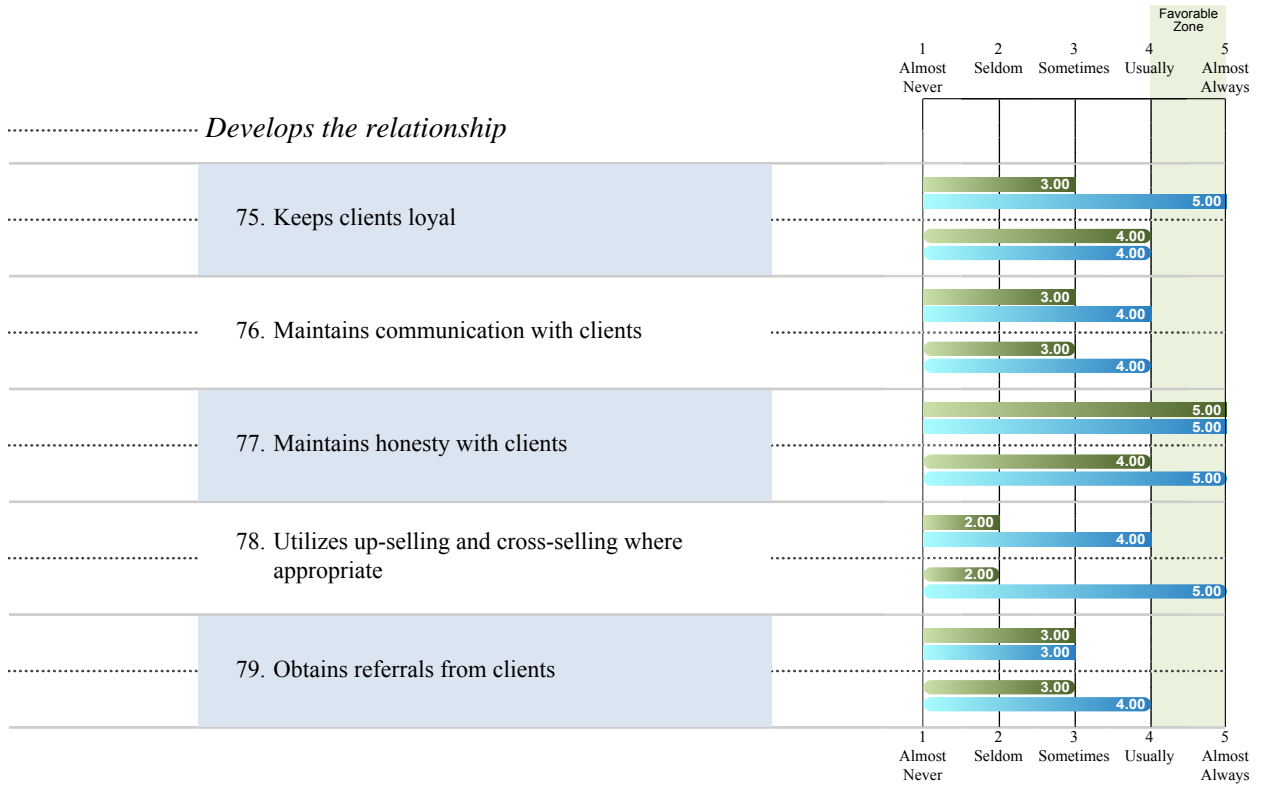
S M

Identifies prospect's needs









Development Summary Overview

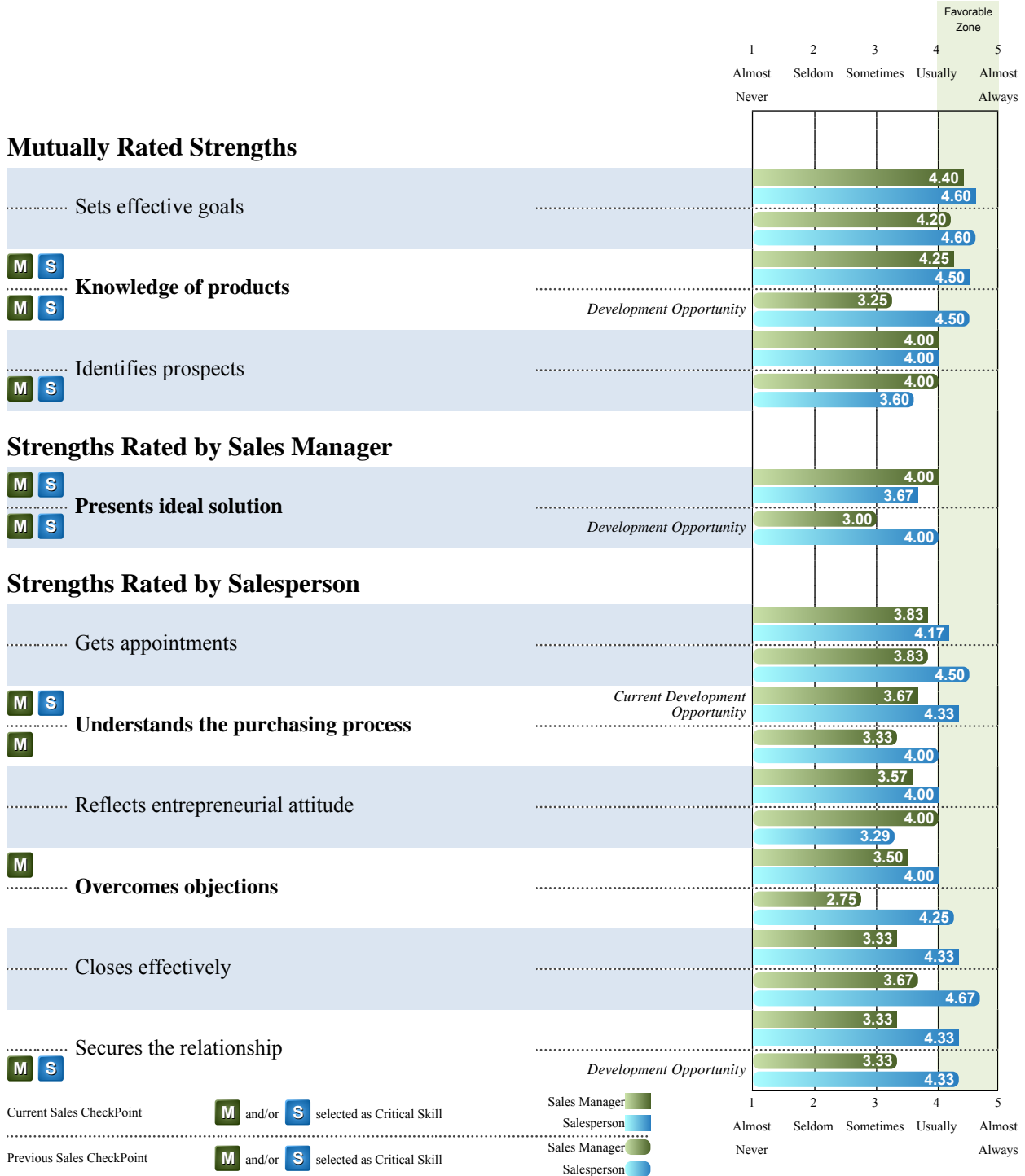
This section reviews the average ratings for each Skill Set. Both ratings for you and your Sales Manager are shown. In this section we have grouped the Skill Sets based on the average ratings and where they fall in relation to the Favorable Zone.

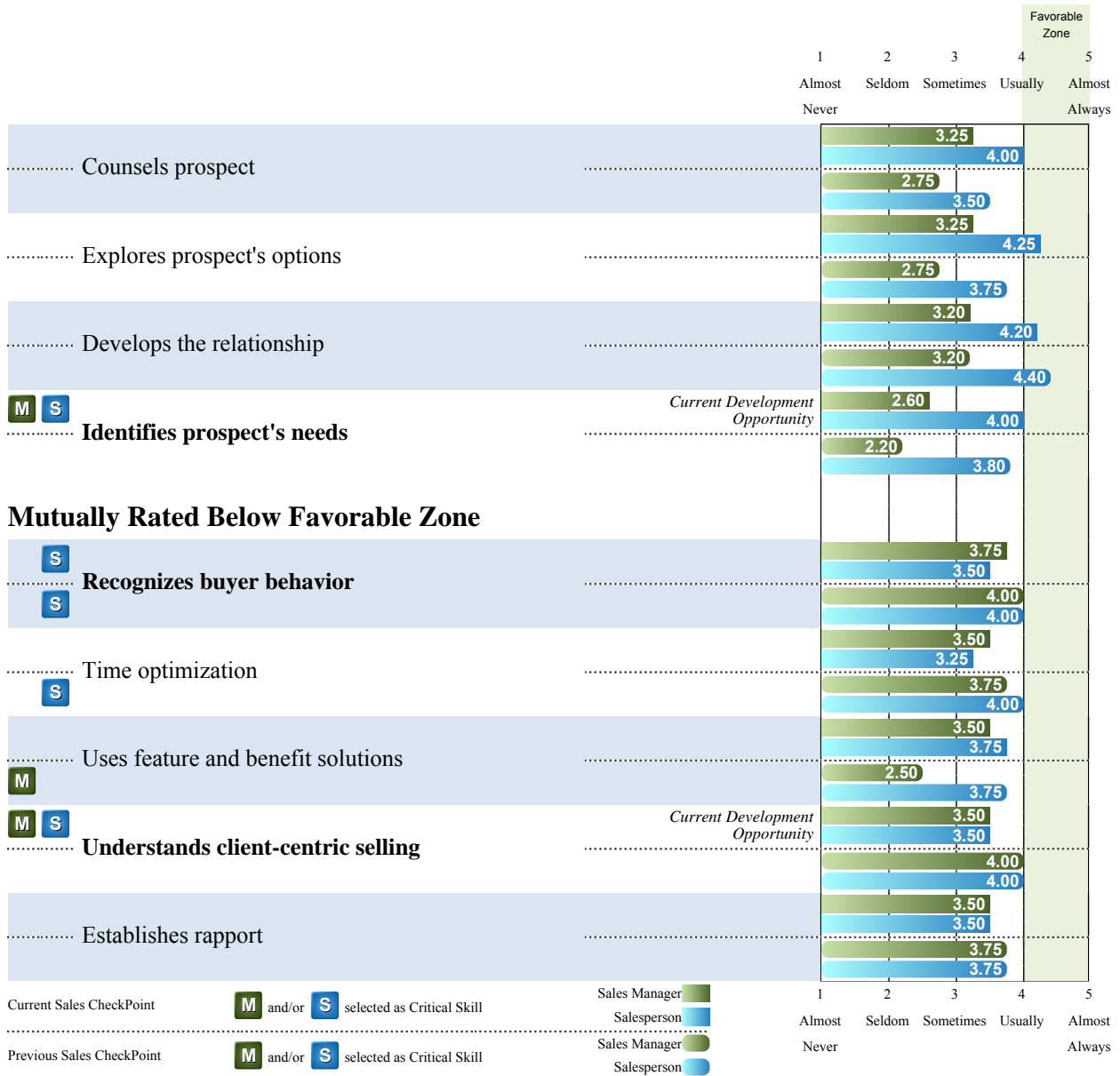
The results for each Skill Set are sorted and grouped together based on whether you and your Sales Manager identified them as critical. Within each grouping, scores are sorted by the average scores of your Sales Manager. Here is how your results are grouped:

- **Mutually Rated Strengths** – The Skill Sets shown here are those which both you and your Sales Manager 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 the average scores of your Sales Manager were in the Favorable Zone. There should be open communication between you both to determine reasons for the differences between these ratings. It is important to align your expectations with those of your Sales Manager regarding these Skill Sets.
- **Strengths Rated by Salesperson** – You rated these Skill Sets in the Favorable Zone, but your Sales Manager did not agree. Meet with your Sales Manager to help you understand why some of your behaviors were found wanting. Work together to align your expectations with regard to these Skill Sets.
- **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 you become more effective in your sales activity. Pay particular attention to those Skill Sets identified as critical by either you or your Sales Manager.

Also identified are three Development Opportunities. These Development Opportunities represent an excellent opportunity for the enhancement of your sales effectiveness. They were identified utilizing a combination of average ratings and their identification as critical to success (Critical Skill Set) by you and the Sales Manager. 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.

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 with your Sales Manager is warranted.





Action Plan

Report Prepared: January 2, 2013

for Sally Sample

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Profiles  International
imagine great people®

Your Action Plan

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.

- **Understands client-centric selling** – Recognizes prospect's needs and strives to make the buying process as easy as possible.
- **Identifies prospect's needs** – Uncovers the real needs of prospects to increase the likelihood of making a sale and increasing client satisfaction.
- **Understands the purchasing process** – Exhibits knowledge of the roles, goals, and processes of purchasing professionals and develops relationships with them.

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 | Both | Salesperson |
| ✓ Overcomes objections | ✓ Understands the purchasing process ✓ Knowledge of products ✓ Understands client-centric selling ✓ Identifies prospect's needs ✓ Presents ideal solution | ✓ Recognizes buyer behavior |

| Development Summary Overview | |
|---|--|
| Development Opportunities | My Action Steps |
| <p>Understands client-centric selling</p> <p>M – 3.50</p> <p>S – 3.50</p> <p>Focus</p> | <p>Target Completion Date: _____</p> <p>Keep Doing: _____</p> <p>_____</p> <p>Stop Doing: _____</p> <p>_____</p> <p>Start Doing: _____</p> |

Development Summary Overview

Development Opportunities

My Action Steps

Identifies prospect's needs

M – 2.60

S – 4.00

Target Completion Date: _____

Keep Doing: _____

Stop Doing: _____

Start Doing: _____

Understands the purchasing process

M – 3.67

S – 4.33

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: _____

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: _____