

# **Sales Effectiveness 360 Online Assessment**

Based on the Book and Learning Series by Jim Cathcart

***Relationship Selling: The Eight  
Competencies of Top Sales Producers***

Personalized Report for:  
Sample Report

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## Dear Sample

Congratulations on your decision to use The SalesEffectiveness360 assessment. Completing this assessment could be one of the most important professional development decisions you will ever make.

Unlike assessments that measure your personality type or aptitude, the SalesEffectiveness360 is an assessment of where you and others perceive your current effectiveness to be in the 32 key aspects of sales readiness. As you examine your ratings in this report please note the areas of agreement and difference between your own perceptions and the perceptions of others.

On the following pages, you will learn much more about SalesEffectiveness360, about what it takes to achieve excellence in each sales competency and most importantly, about how to become more effective in every individual aspect of successful selling. Your scores on each of the 32 questions are presented in the main body of this report one at a time.

## What is the SalesEffectiveness360?

Sales success requires that you be highly effective in two areas:

1. Making sales
2. Managing yourself as a sales person.

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There is a multitude of skills, behaviors, knowledge and attitudes involved in any successful sales career. To know how to improve your own sales performance requires that you look at all of them from time to time.

The SalesEffectiveness360 (SE360) is your tool for doing a quick self-assessment and for gaining the input of others as well.

This instrument consists of a simple set of 32 questions that guide you in assessing each of the eight primary sales competencies. A sales "competency" is a category of selling proficiency that contains a number of different skill and knowledge components. All eight competencies combine to provide an overview of your selling effectiveness.

Four questions explore each competency from a variety of perspectives. For example; in "preparation" the competency is explored by questions related to Sales preparation as well as Self preparation. Sales preparation is addressed externally, outside your own company, and internally, within your company. Self preparation is addressed from the standpoint of mental preparation and physical preparation. A similar pattern is applied to all eight competencies.

What this means to you is; when you want to increase your sales results, rather than just making more calls or being more persuasive in your presentations, you can identify exactly which of the 32 aspects of selling on which to focus. You can be surgical in your focus rather than general. For example: Your limiting factor may be in who you have targeted as prospects, or in how you are trying to build credibility with them. Or, it may be in the questions you are asking to determine a prospect's needs or even in the way you answer questions.

By assessing your sales readiness in each area you will gain an overview that allows you to be a much better self manager as well as a better sales person.

This SalesEffectiveness360 assessment should be done at least three times each year. As you master one area of selling, another area will need your attention. Nobody can attend to all areas all of the time, so occasional check-ups will make a big difference in keeping you in a constant state of improvement.

The Observer component is a big value in your SalesEffectiveness360. By seeking an assessment from others, i.e. a sales coach, manager, coworker, friend, or key client, you will expand your awareness profoundly. Even though you may know yourself very well, the observations of others about your skills or behaviors can tell you much that would never have occurred to you by using only your own point of view.

Three possible outcomes will be evident in your SalesEffectiveness360. When you see the chart displaying your self assessment side by side with the assessments from your observers, you will see:

1. Areas on which you agree that things are going fine
2. Areas on which you agree that improvement is needed
3. Areas on which you disagree about the need

With the agreement that things are fine your best path is to continue as is. With the agreement that improvement is needed your next step is to decide specifically what and how to improve. And, with disagreement as to whether improvement is needed, you can focus on exploring the situation to see whose view is most accurate.

The major aspects of each sales area are identified for you in this report and are directly related to each of the 32 key areas of sales effectiveness. For further information on any of these topics, contact us at the address provided elsewhere in this report.

## **The Eight Competencies of SalesEffectiveness360**

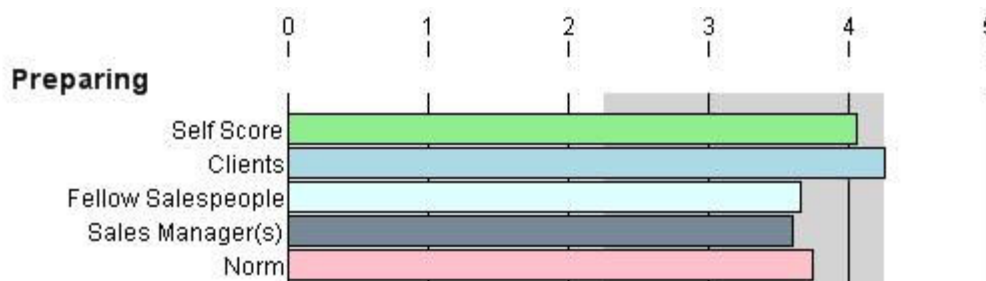
1. **PREPARE to Sell** - Sales Preparation & Self Preparation
2. **TARGET the Right Prospects** - The Right People & The Right Strategies
3. **CONNECT with the Person** - Connect Intellectually (Head) & Emotionally (Heart)
4. **ASSESS the Needs** - Situational Needs & Personal Wants
5. **SOLVE the Customer's Problem** - Educating & Collaborating with the Customer
6. **COMMIT to the Sale** - Commit to the Solution & to the Purchase
7. **ASSURE Customer Satisfaction** - Assure Current Satisfaction & Continuing Loyalty
8. **MANAGE Your Sales Potential** - Manage Sales & Manage Yourself

# COMPETENCY 1: Preparation

The foundation of all sales effectiveness is preparation. Those who are well prepared can be considered "sales ready" for whatever situation arises. Those who are not are controlled by circumstances.

The preparation competency is a group of skills centered around two categories: Sales preparation and Self preparation.

## Your Personal Score - 77



## Sales Preparation Falls Into Two Areas: External and Internal

### External Sales Preparation

External preparation is about researching and understanding your market, industry and competition. This is done by looking for information and resources outside of your own organization. This includes such items as:

Market research, research on your competitors, studying various sales techniques, concepts and learning materials, researching your customers and prospects, industry research, getting demographics, statistics and details to help you better understand your prospective buyers and their needs.

Territory planning and overall market strategies, sales projections and setting your general sales strategies and tactics also fall into external sales preparation.

**External Sales Preparation Score: See Question 1 on page 23**

### Internal Sales Preparation

Internal preparation is done by knowing and using your company, products, clients and resource team effectively. This involves looking for information and resources within your own organization. This includes such items as:

Company knowledge, product knowledge, job knowledge, knowing the sales tools and systems that are most successful, researching customer histories, studying past clients and trends in your chosen markets. Setting sales goals, activity goals, goals for each account and each sales contact, and coordinating with others on your sales team.

**Internal Sales Preparation Score: See Question 2 on page 23**

## Self Preparation Falls Into Two Areas: Mental and Physical

It is not enough to just have the information and training in powerful sales strategies. You must also be personally ready to apply this knowledge and do so with confidence, enthusiasm and sincerity.

In the final analysis it is the sales person not merely the sales process that makes the difference. The person generates the sales, builds trust and stimulates the desire to buy.

### Mental Self Preparation

Mental preparation is done by refreshing your knowledge and getting into the right frame of mind. This includes such items as:

Reviewing your specific goals for each sales contact, refreshing your knowledge of sales techniques, product details, customer benefits offered by each feature of your product or service, pricing strategies and options you can offer.

The review of vital information just prior to a sales contact, rehearsal of the presentation, anticipating potential objections and concerns, reviewing answers to key questions, listing questions you will want to ask, and getting yourself into a cheerful, helpful and proactive frame of mind.

**Mental Self Preparation Score: See Question 3 on page 23**

### Physical Self Preparation

Physical preparation is done by preparing your sales resources and personal appearance for the right impact. This includes such items as:

Determining when and where to meet your customer, choosing the seating arrangement that works best, handling potential distractions in advance, assembling the sales tools and information resources you will need, and allowing for interruptions and delays.

Every aspect of your appearance counts here; clothes and grooming, personal hygiene, showing up on time, considering how you greet others and present yourself when you think others aren't looking, checking to assure that your sales materials and products present the right image and are working properly.

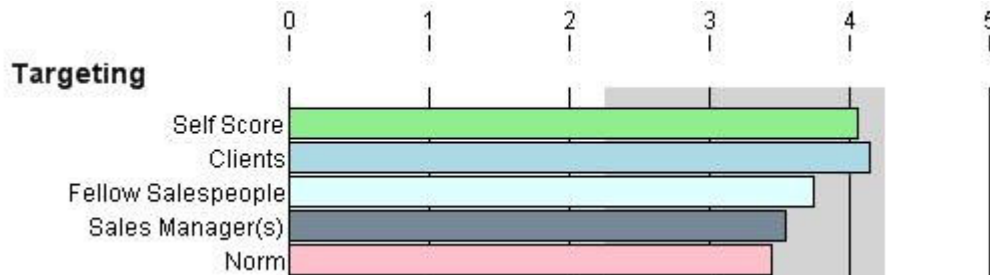
**Physical Self Preparation Score: See Question 4 on page 23**

## COMPETENCY 2: Targeting

One thousand sales calls made on people who are not valid prospects for your product or service would be unlikely to produce even one good sale. Yet, one sales call on the right prospect with the right offer might produce abundant sales. Who you target and how you approach them has everything to do with your sales success.

The targeting competency is a group of skills centered around two categories: Selecting the right people (Markets) and Identifying the best ways (Methods) of selling to them.

### Your Personal Score - 76



### Targeting the Right Markets Falls Into Two Areas: Groups and Individuals

#### Targeting the Right Groups

Targeting the right Groups is about identifying the categories, types of organizations and groups of best prospective customers, those who can best afford and most benefit from your product or service. This includes such items as:

Market analysis, competitive analysis, studying the sales statistics of your products and those of others in this marketplace, knowing where the biggest pools of potential buyers live and work, analyzing the sales potential of each product within each market segment, ranking your accounts and generating a comprehensive market profile.

Developing a list of your many "publics" and determining how they get their information, who they listen to, what they desire, fear, etc. Finding out where they congregate, what groups they belong to, and what publications they read.

**Targeting the Right Groups Score: See Question 5 on page 23**

#### Targeting the Right Individuals

Targeting the right Individuals is about identifying your ideal customers and finding the decision makers. This includes such items as:

Having a clear profile of your ideal customer, knowing who has decision making power within the organization, isolating the most important needs you can address for them, following a valid process to qualify each prospective customer, spending very little time with non decision makers and gatekeepers, and assuring that you are calling on the people with whom you can best establish credibility.

Targeting also includes generating leads, gaining qualified referrals, building powerful testimonials and endorsements, getting introductions, and building an unending flow of future prospects.

**Targeting the Right Individuals Score: See Question 6 on page 23**

## Targeting the Right Methods Falls Into Two Areas: Strategies and Tactics

Sales strategies are the general approaches taken to generate business. Sales tactics are the specific approaches taken to situations and individuals. Great strategies can be destroyed by poor tactics and great tactics can be made obsolete by poor strategies.

But the right strategies when coupled with the right tactics are a very powerful combination.

### Strategies

Strategies involve building a reputation and brand position that will generate sales. It also involves choosing the specific approaches you take toward building demand for and distribution of your product. This includes such items as:

Determining what reputation and brand identity you want in your chosen markets, identifying the "professional assets" you will need in order to gain that reputation or position, choosing the mix of media and sales approaches to use, acquiring the resources needed for promotion and publicity, having a coordinated plan and ongoing process for stimulating interest in and desire for your products. Selecting the best distribution methods for reaching your markets.

Using email, web marketing, trade shows, direct mail, phone calls, joint ventures and other sales tools in a coordinated manner. This also includes selecting the right number and type of sales calls to make.

**Strategies Score: See Question 7 on page 23**

### Tactics

Tactics involve calling on the right people in the right ways to open up sales opportunities. This includes such items as:

Determining how to best penetrate a company or industry group, who to call on first, what sales appeals to use, which products to lead with, what offers to make, who should make the first call, how to progress from one sale to another easily, how many calls to make per prospect, developing methods for getting to the decision makers with minimal effort, and how to sell through others or to committees.

Having a compelling "elevator talk" or unique value proposition, knowing your various sales hooks and door opening statements, using samples and free gifts appropriately. Determining how you can best reach your prospects with the credibility and confidence that will open doors and minds to your offer.

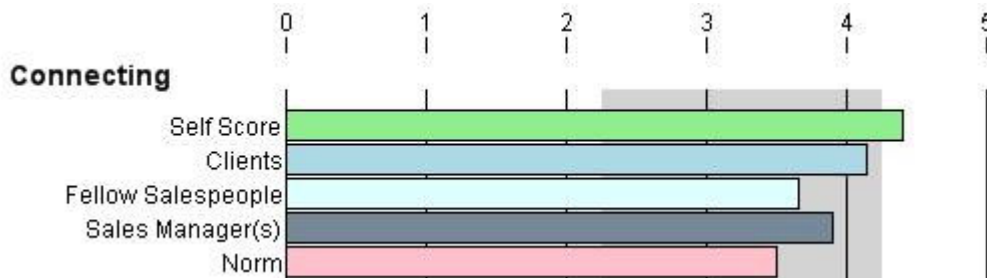
**Tactics Score: See Question 8 on page 23**

## COMPETENCY 3: Connecting

Connecting with someone requires understanding them and their interests as well as showing them how you are a relevant resource to them.

The Connecting competency is a group of skills centered around two categories: Connecting with the Head or Intellect and with the Heart or Emotions.

### Your Personal Score - 79



### Connecting with the Head or Intellect Falls Into Two Areas: Credibility and Activity

#### Credibility

Credibility is about establishing yourself as a viable resource to the prospect. This includes such items as:

Establishing your credentials and qualifications for helping the prospect with your type of product or service, using testimonials and endorsements wisely, tapping into referrals to open the dialogue, showing the importance of your offer to the prospect, asking compelling questions, documenting your claims, being organized and professional in your early communication, making the case for how much value you can bring to the prospect, using sales tools and resources to build credibility as you communicate with each prospect or client.

This area also includes showing the person that you are there as a resource not merely as a vendor.

**Credibility Score:** See Question 9 on page 23

#### Activity

Activity involves making the right number and type of sales contacts. This includes such items as:

Actually getting in front of the right type and number of people who could benefit from buying, both new and repeat customers, and your discipline in filling each day with actual sales contacts. This also includes telephone calls, email communications, correspondence, in person calls and live demonstrations.

Sales activity is measured by the amount and quality of direct communication with qualified prospects rather than the supportive activities that process sales or lead to future business. The customer must come to the conclusion that you are a viable resource to them and that it makes good sense to do business with you.

**Activity Score:** See Question 10 on page 23

## Connecting with the Heart or Emotions Falls Into Two Areas: Relationship and Trust

Rapport is generated on the emotional level not the intellectual. Exceptional sales producers learn to combine the human connection with the information they deliver.

### Relationship

Relationship is about understanding personality differences and buying styles. This includes such items as:

Learning to read people so as to know how they process information and how they relate to others, matching the pace and style of the prospect, practicing good people skills such as courtesy, empathy, acknowledgement, and rapport building.

This also means knowing how to position yourself into the appropriate relationship with the customer, i.e. advisor, coach, problem solver, expert resource, strategic ally, business friend, preferred provider.

**Relationship Score: See Question 11 on pages 23-24**

### Trust

Trust is about building trust and managing relationship tension. This includes such items as:

Sustaining optimism and encouragement in the dialogue, keeping fear levels low while stimulating the need to buy, recognizing when tension should increase and should not, knowing the difference between relationship tension and task tension. Showing concern for the needs of the prospect and respecting him or her as a person. Being appropriately respectful of your competition without weakening your own position as a solution source. Knowing how to draw a line between being a social friend and being a business friend.

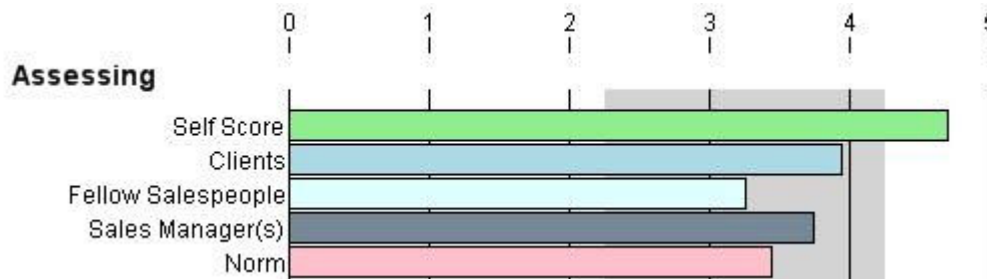
**Trust Score: See Question 12 on page 24**

## COMPETENCY 4: Assessing

*In selling, as in medicine, prescription before diagnosis is malpractice. The better you have assessed someone's need and wants the more effectively you can lead them to a buying decision. The SalesEffectiveness360 relies on the accurate understanding of a person's interests as the beginning of solving their problems and building a sales relationship.*

*The Assessing competency is a group of skills centered around two categories: Assessing the Situation (Needs) and the Person (Wants).*

### Your Personal Score - 75



### Assessing the Situation (Needs) Falls Into Two Areas: Probing and Analyzing

#### Probing

Probing is about being skilled at asking the right questions and getting the answers. This includes such items as:

Knowing what to be curious about, understanding the many types of questions and questioning techniques, being skilled at asking for information in a non-threatening way, determining how buying decisions of this type are made by this person and organization, and learning how to probe for information that you might otherwise overlook.

**Probing Score:** See Question 13 on page 24

#### Analyzing

Analyzing is about identifying the needs and opportunities. This includes such items as:

Exploring all the information presented to you in such a way that you identify the gap between what they have and what they need, recognizing the practicality of their expectations, assessing financial aspects, identifying opportunities, alternatives and options available, seeing resources you can use, and finding additional reasons for the prospect to buy. Recognizing the roles that various people play in the buying decision.

**Analyzing Score:** See Question 14 on page 24

## Assessing the Person (Wants) Falls Into Two Areas: Understanding and Empathizing

Companies may have needs but only people have wants. To understand a situation and not the person could lead to your making the right offer in the wrong way and losing the sale altogether. Once you understand the person you are selling to then the best ways of selling to them become obvious. Look for wants as well as needs.

### Understanding

Understanding is about finding the primary buying motive. This includes such items as:

Finding the hot button items that contain the strongest appeal to the prospect, identifying the gap between what they need and what they want, recognizing prejudices or blind spots in their point of view, learning how they feel about competitive alternatives, identifying their fears and concerns, understanding their overall goals, values and priorities, seeing the limits to their authority and best ways to help them justify buying.

**Understanding Score: See Question 15 on page 24**

### Empathizing

Empathizing involves listening and people reading, understanding feelings as well as facts. This includes such items as:

Respecting the importance of feelings and emotions, truly caring about how you can help, listening effectively, eliminating any irritating listening habits you may have developed, getting people to talk openly with you, being aware of differences in personality type, personal velocity, intellectual capacity, values, confidence levels, dreams and aspirations, fears and concerns.

Adaptability is also a key component of empathizing. This is your ability to adjust your own pace or preferences to be more compatible with your customer's. It is also dealing with different people in different ways while maintaining your own integrity.

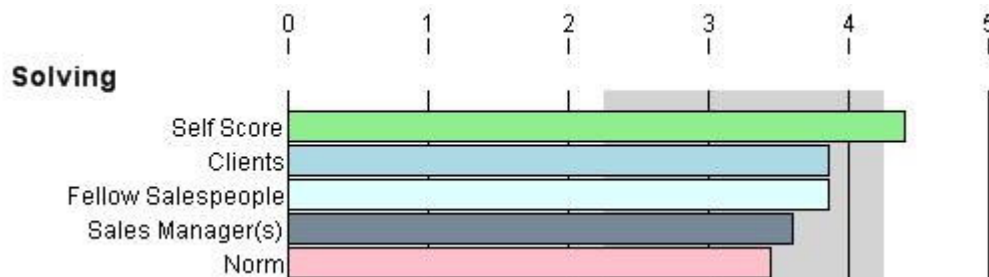
**Empathizing Score: See Question 16 on page 24**

## COMPETENCY 5: Solving

The entire purpose of a sales contact is found in the solution of the customer's problems, the filling of his or her needs. This aspect of selling, commonly thought of as only the presentation, is in fact a much more complex set of elements. When the solving is handled appropriately the decision to buy is easy and natural. The goal of solving is to have the customer realize exactly how you can help and be able to feel the value he or she will receive from you.

The Solving competency is a group of skills centered around two categories: Educating the person about your offer and Collaborating with them to see why and how to buy it.

### Your Personal Score - 76



### Educating Falls Into Two Areas: Presenting and Showing Relevance

#### Presenting

Presenting refers to your ability to deliver a persuasive presentation. This includes such items as:

Assembling compelling information and materials, using presentation tools with skill, speaking confidently and effectively one on one, in front of a group, with and without presentation aids, reacting professionally to distractions and interruptions, involving your listeners in your presentation, using persuasive language, blending gestures and words appropriately, changing pace and style to fit the situation, holding attention and starting and ending on time.

This also includes the quantity of presentations you are delivering. Being really good at presentations yet not delivering many of them will surely lead to poverty from lack of sales. Keep your sales activity high. Make presentations often.

**Presenting Score:** See Question 17 on page 24

#### Showing Relevance

Showing Relevance is about providing compelling evidence as to how the customer will benefit from buying. This includes such items as:

Documenting and providing evidence of the value you are bringing to the customer, relating your presentation to the goals, interests, fears, concerns, priorities, needs and values of your client. Pointing out and emphasizing the gap between what the person has and what they could have from you, quantifying the payoff for the client.

Building value units is included here. A value unit is the following package: one of the client's needs, a feature you offer, benefits accruing from the feature, value of the benefits to the client, proof that you can deliver it, cemented by the client's agreement that this matters to him or her.

**Showing Relevance Score:** See Question 18 on page 24

## Collaborating Falls Into Two Areas: Personalizing and Involving

Until a person feels a direct connection with your offer they remain detached and unmotivated to buy. By personalizing your message and involving the customer in the dialogue or demonstration you will increase their motivation to say yes.

Our job as sales professionals is to assure that the client's needs are met while still addressing their wants (their "felt" problem.) When we can stimulate someone to want what they most need we have done them a great service.

### Personalizing

Personalizing is getting the customer to understand and feel the value of your offer. This includes such items as:

Selling benefits and solutions rather than features, presenting the value units that were built in the "showing relevance" process, illustrating your points with stories and examples that relate directly to your client, conducting demonstrations and giving actual examples that show the customer the value they will receive. Using the customer's name and the name of their company as appropriate. Referring to local and current items, people and issues in your presentation. Using the customer's own words when responding to questions.

**Personalizing Score: See Question 19 on page 24**

### Involving

Involving is getting the customer to participate in discovering the solution they seek. This includes such items as:

Getting the customer to help you make the sale, asking for support, involving the customer in completing some of the steps in a demonstration, or in establishing a point-counterpoint role play discussion to illustrate a point, working as a partner in problem solving rather than as a persuader, putting yourself in your customer's position and speaking as his or her advocate, leading them through a series of questions to help them explore the benefits you can offer, working together to generate a plan.

When selling to a committee or having someone take your proposal to others this means helping the prospect prepare to be an effective representative and advocate for you. Assembling materials that they can use to sell others on your behalf.

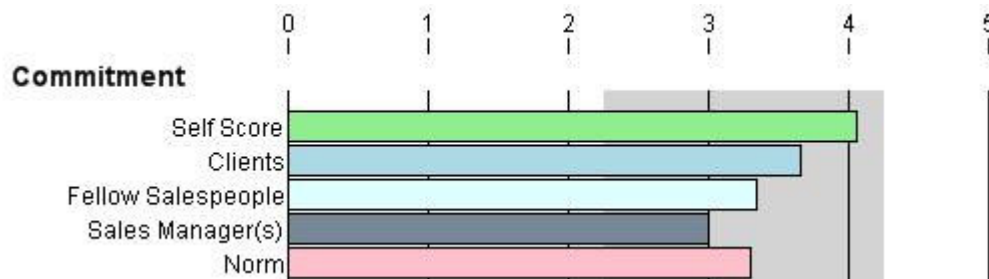
**Involving Score: See Question 20 on page 24**

## COMPETENCY 6: Commitment

Until someone says "yes" and puts pen to paper all that precedes it is just dialogue. The commitment phase is where the purchase becomes official. This is the process in which the prospect becomes a customer by shifting from merely considering the purchase to actually owning the product or service. This is where they start thinking as an owner.

The Commitment competency is a group of skills centered around two categories: Committing to the Solution and Committing to the Purchase.

### Your Personal Score - 67



### Committing to the Solution Falls Into Two Areas: Summarizing and Negotiating

#### Summarizing

Summarizing is giving benefit summaries and identifying next steps for your customer. This includes such items as:

Giving benefit summaries, value illustrations, projecting what they will get, comparing statistics of owning vs. not owning your product, reviewing the reasons that they should want to buy, eliminating lingering concerns, getting buy-in from others involved in the decision, gaining minor and major agreements toward the buying decision, using opinion questions, trial closes, and confirming smaller details to free the way to the buying commitment.

**Summarizing Score: See Question 21 on page 24**

#### Negotiating

Negotiating is mostly about resolving the customer's concerns without reducing your price. This includes such items as:

Working as collaborators toward finding solutions vs. becoming adversaries in a disagreement, using tact and diplomacy effectively, agreeing to minor points without conceding major ones, apologizing when needed, letting the prospect prevail on some issues, standing your ground on others, comparing your positions on various issues, noting areas of general agreement, responding effectively to objections and concerns, having organized answers to the most common concerns and questions, knowing how much flexibility you have on the three primary areas of negotiation: price, terms, and conditions.

Measuring your actual net profit per sale, noting the use of concessions and give-aways in the mix. Considering the impact of your agreements on other departments and people in your business pipeline.

**Negotiating Score: See Question 22 on pages 24-25**

## Commitment To The Purchase Falls Into Two Areas: Asking and Confirming

Agreement without action is merely intention. Action without agreement is anarchy.  
The most measurably significant part of the sale is the commitment to the purchase itself.  
This is when you learn whether all the rest of what you have done was done effectively.

### Asking

Asking is about clearly requesting the purchase and making it easy for the person to say yes. This includes such items as:

Recognizing buying signals and knowing how to respond to them, knowing when to ask for the order, asking in a way that is natural and does not increase relationship tension, using the customer's words in the statement you make just before requesting the commitment, being clear about asking for the order, allowing for silence after you ask so that the customer can make the transition from considering the product into owning the product. Rehearsing the request for the order with others so as to increase your confidence and poise when face to face with a prospective customer. Eliminating implied apologies or uncertainty in the way you ask. Knowing what words have power and what words don't. Making it easy for the prospect to agree to the purchase.

**Asking Score:** See Question 23 on page 25

### Confirming

Confirming is getting the formal commitment to buy. This includes such items as:

Handling objections and concerns effectively, getting written commitments to specific agreements, summarizing agreements, eliminating lingering concerns or resistance, ironing out all details before concluding the call, measuring your actual closing ratio (calls to sales), keeping records of the actual value of each sale. Getting the official signatures on the documents, noting and confirming the credit card or account numbers, getting the vital data such as social security number, purchase order number, etc. Assuring that the customer is fully aware that he or she has made a commitment to buy and they know the amount, terms and conditions to which they have agreed.

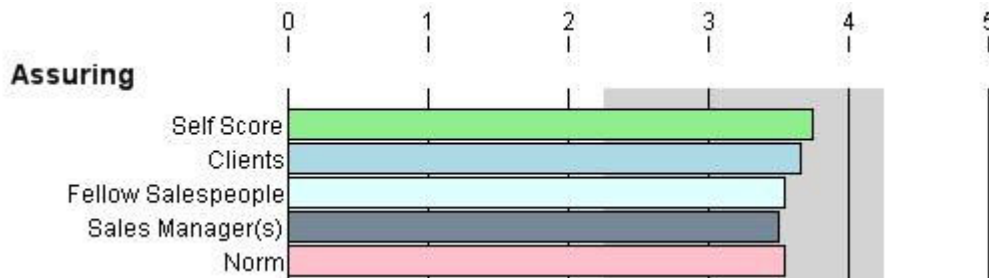
**Confirming Score:** See Question 24 on page 25

## COMPETENCY 7: Assuring

*The biggest threat to a confirmed sale is missed expectations. We must remain conscious of our obligation to help the customer receive what was promised and enjoy the benefits it can provide. Our commitment to the customer has just begun.*

*The Assuring competency is a group of skills centered around two categories: Current Satisfaction and Continuing Loyalty.*

### Your Personal Score - 71



### Assuring Current Satisfaction falls Into Two Areas: Review and Follow Through

#### Review

Review is giving an on-site summary of the value of buying plus a preview of next steps. This includes such items as:

Orientation to ownership, providing owner's documents, manuals, basic instructions, introductions to service personnel, samples, assistance in start up procedures, initial hand holding, having the customer perform some of the functions in your presence (remember that operator error is the main source of dissatisfaction).

This also includes annual account reviews with existing customers, performance reports, getting feedback from customers as to their buying or ownership experience, etc.

**Reviewing Score:** See Question 25 on page 25

#### Follow Through

Follow Through is supervision of the delivery and initial steps of the ownership experience. This includes such items as:

Call backs to check on delivery or initial use, checking with others within your company to assure that all goes as promised, getting feedback from the new owner that allows you to improve their experience immediately, doing little extra things that exceed the customer's expectations. Making immediate corrections of problems or errors.

The goal of this aspect is to cause the customer to feel safe, protected, cared about, and as if they are in the hands of an expert. This is where you deliver what you promised and determine how strong the trust bond will be for the future. Many referrals and testimonials are generated during the follow through process when it is done well.

**Follow Through Score:** See Question 26 on page 25

## Assuring Continuing Loyalty Falls Into Two Areas: UpServing and Recovery

It has been found that as many as 85% of customers who changed to another supplier departed primarily because they felt their existing supplier was indifferent toward them, they didn't seem to care. Exceeding customer's expectations doesn't end just after the purchase. We must exhibit continuing loyalty to them if we expect the same in return.

### UpServing

UpServing is adding value after the sale, increasing their satisfaction. This includes such items as:

Holding yourself to high service standards, looking for ways to increase the customer's satisfaction without necessarily adding cost to you, showing customers that you care, sharing ideas for more owner enjoyment, passing along tips and new ideas, performing in-person service calls on occasion, doing periodic account reviews and reminding customers of the value they are getting, considering your customers to be your business family and showing it. Holding customer appreciation events.

Face time, actual in-person time with customers is a vital part of this mix. Even though email and cell phones allow us to communicate easily, nothing takes the place of in-person visits where appropriate. Use the right mix of forms of communication for each client. Upgrades and purchase increases also fit into this area.

**UpServing Score: See Question 27 on page 25**

### Recovery

Recovery is smoothly resolving problems and retaining the customer's loyalty. This includes such items as:

Resolving problems quickly, taking time to personally correct errors, showing up to demonstrate your concern, listening fully before responding, replaying a customer's words and feelings before trying to explain your position, making allowances for the emotional component in a problem, fixing the person first and then the problem, offering a sincere apology, acknowledging errors and insensitive behaviors, describing to the customer how you understand his or her dilemma, providing compensation appropriate to the error, making symbolic gestures of apology or sympathy.

The main thing a dissatisfied customer wants to know is that you care and that you will do what is appropriate to make the situation right again. Don't delay in doing so. Recovery can be measured through repurchase ratios, customer retention and upgrades.

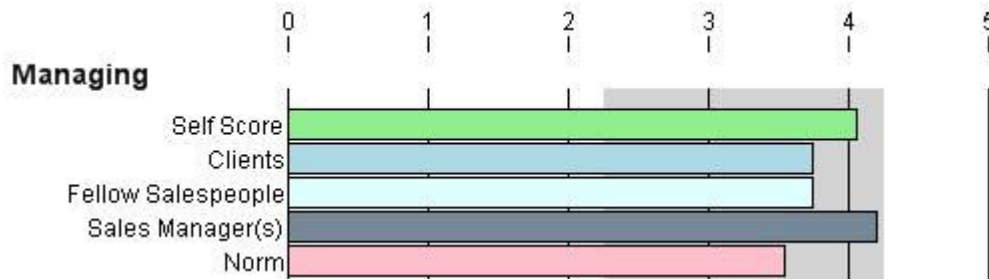
**Recovery Score: See Question 28 on page 25**

# COMPETENCY 8: Managing

Those who manage themselves effectively experience more success than those who are effectively managed by others. You are with you 24/7; you know your thoughts, feelings, fears and dreams. Nobody can manage you better than you could manage yourself. Learn to be your own sales manager and your future will be in your own hands. If you work for someone else, be sure to follow and respect their guidance as well.

The Managing competency is a group of skills centered around two categories: Managing Sales and Managing Yourself as a sales person.

## Your Personal Score - 79



## Managing Sales Falls Into Two Areas: Resources and Information

### Resources

Managing Resources is using technology and other resources to improve your sales effectiveness. This includes such items as:

Human resources such as coworkers, specialists and experts, your sales manager, sales coach, colleagues, family and friends, support team, and even your customers and centers of influence. Reaching out to others for strength, wisdom and support is key to being your best. Managing your time wisely. Knowing and respecting the prime selling time.

Material resources such as sales tools, presentation equipment, demonstration models, computers, Customer Relationship Management or Sales Force Automation software, online presentation tools, resources within your own website, testimonials and case studies of successful sales or applications.

**Resources Score: See Question 29 on page 25**

### Information

Managing Information is keeping and using sales records to manage yourself effectively. This includes such items as:

Keeping and using sales records to improve ratios of calls to contacts to presentations to sales to profits to customer retention to reorders and upgrades, etc. Monitoring your costs of doing business, knowing your best uses of time, recognizing your strengths and areas of vulnerability, managing business priorities, keeping good customer records and keeping your information up to date. Tracking website usage, effectiveness of direct mail or email campaigns, sources of prospects, best selling products, best areas for profit, etc.

**Information Score: See Question 30 on page 25**

## Managing Yourself Falls Into Two Areas: Growth and Motivation

The person who can manage him or herself effectively has an edge over all others who cannot. The people at the top of every profession are always the best self-managers. Sales is the one profession that is perfectly suited to those who can grow and motivate themselves because it is the sales people in any society who keep the entrepreneurial spirit alive.

### **Growth**

Growth is about learning and improving, becoming a greater resource to others. This includes such items as:

Lifelong learning, personal and professional goal setting, building equity in your career by acquiring professional assets such as; reputation, relationships, credentials, education, experiences, net worth, and expert skills. Developing all areas of your life: mental, physical, family, social, spiritual, career, financial and emotional. Tracking and increasing your growth in each area. Career advancement and social advancement.

Cultivating the habit patterns of the person you would like to be.

**Growth Score: See Question 31 on page 25**

### Motivation

Motivation is about self-leadership, getting yourself to do what needs to be done, when it needs to be done, whether you feel like it or not and still doing it well. This includes such items as:

Maintaining a positive mindset, overcoming sales slumps, resisting performance plateaus, handling rejection effectively, managing your personal priorities, keeping yourself active in your career, reaching beyond your previous limits, challenging yourself, reaching outside your own interests to be of service to others, becoming a better person with each passing day, raising the standards to which you hold yourself. Clarifying your dreams and goals and keeping them before you every day.

Using tools, information, relationships and reminders to keep yourself at your best every day. Encouraging others in their own quest to grow and succeed.

**Motivation Score: See Question 32 on page 25**

## YOUR STRENGTH AREAS

This section gives you a snapshot of the five areas with the highest average scores (from highest to lowest) from all your raters combined.

Questions Relating to Strengths	Average
<b>32.</b> Motivation: Getting yourself to do what needs to be done when it needs to be done, whether you feel like it or not and still doing it well. (Self-Leadership)	3.36
<b>31.</b> Growth: Learning and improving, becoming a greater resource to others.	3.27
<b>3.</b> Mental: Refreshing your knowledge and getting into the right frame of mind.	3.18
<b>4.</b> Physical: Preparing your sales resources and personal appearance for the right impact.	3.18
<b>9.</b> Credibility: Establishing yourself as a viable resource to the prospect.	3.18

## YOUR IMPROVEMENT AREAS

This section gives you a snapshot of the five areas with the lowest average scores (from lowest to highest) from all your raters combined.

Questions Relating to Areas of Improvement	Average
<b>22.</b> Negotiating: Resolving the customer's concerns without reducing price.	1.91
<b>27.</b> UpServing: Adding value after the sale, increasing customer satisfaction.	2.64
<b>23.</b> Asking: Clearly requesting the purchase and making it easy to say yes.	2.73
<b>25.</b> Reviewing: Giving a point-of-sale summary of the value of buying plus a preview of next steps.	2.73
<b>2.</b> Internal: Knowing and effectively using your company, products, clients and resource team.	2.82

## YOUR BLIND SPOTS

This section gives you a snapshot of the 5 areas with the greatest difference between your scores and the average scores from all your raters combined. A + sign means you scored yourself lower than the raters (this is good!). A - sign means you scored yourself higher than the raters (this is not so good).

Questions Relating to Blind Spots	Average
<b>23.</b> Asking: Clearly requesting the purchase and making it easy to say yes.	-1.27
<b>2.</b> Internal: Knowing and effectively using your company, products, clients and resource team.	-1.18
<b>15.</b> Understanding: Finding the primary buying motive.	-1.18
<b>22.</b> Negotiating: Resolving the customer's concerns without reducing price.	-1.09
<b>14.</b> Analyzing: Identifying the needs and sales opportunities.	-1.09

Questions	Category	# of responses	Average within category
<b>Preparing</b>			
1. External: Researching and understanding your market, industry and competition.	Self Clients Fellow Salespeople Sales Manager(s) Variance	1 3 3 5	3.00 3.67 2.67 2.80 0.00
2. Internal: Knowing and effectively using your company, products, clients and resource team.	Self Clients Fellow Salespeople Sales Manager(s) Variance	1 3 3 5	4.00 3.33 2.67 2.60 -1.18
3. Mental: Refreshing your knowledge and getting into the right frame of mind.	Self Clients Fellow Salespeople Sales Manager(s) Variance	1 3 3 5	3.00 3.33 3.33 3.00 0.18
4. Physical: Preparing your sales resources and personal appearance for the right impact.	Self Clients Fellow Salespeople Sales Manager(s) Variance	1 3 3 5	3.00 3.33 3.00 3.20 0.18
<b>Targeting</b>			
5. Groups: Identifying the categories and groups of best prospective customers.	Self Clients Fellow Salespeople Sales Manager(s) Variance	1 3 3 5	3.00 3.00 3.00 3.00 0.00
6. Individuals: Identifying the ideal customers and finding the decision makers.	Self Clients Fellow Salespeople Sales Manager(s) Variance	1 3 3 5	3.00 3.33 3.00 2.60 -0.09
7. Strategies: Building a reputation and brand position that will generate sales.	Self Clients Fellow Salespeople Sales Manager(s) Variance	1 3 3 5	3.00 3.33 3.33 2.80 0.09
8. Tactics: Calling on the right people in the right way to open up sales opportunities.	Self Clients Fellow Salespeople Sales Manager(s) Variance	1 3 3 5	4.00 3.67 2.67 3.00 -0.91
<b>Connecting</b>			
9. Credibility: Establishing yourself as a viable resource to the prospect.	Self Clients Fellow Salespeople Sales Manager(s) Variance	1 3 3 5	4.00 3.67 3.33 2.80 -0.82
10. Activity: Making the right number and types of sales contacts.	Self Clients Fellow Salespeople Sales Manager(s) Variance	1 3 3 5	3.00 3.00 3.00 3.00 0.00
11. Relationship: Understanding personality	Self Clients	1 3	4.00 3.33

differences and buying styles.	Fellow Salespeople Sales Manager(s) Variance	3 5	2.67 3.20 -0.91
12. Trust: Building trust and managing relationship tension.	Self Clients Fellow Salespeople Sales Manager(s) Variance	1 3 3 5	3.00 3.33 2.67 3.40 0.18
<b>Assessing</b>			
13. Probing: Asking the right questions and getting the answers.	Self Clients Fellow Salespeople Sales Manager(s) Variance	1 3 3 5	4.00 3.00 3.00 3.20 -0.91
14. Analyzing: Identifying the needs and sales opportunities.	Self Clients Fellow Salespeople Sales Manager(s) Variance	1 3 3 5	4.00 3.33 2.33 3.00 -1.09
15. Understanding: Finding the primary buying motive.	Self Clients Fellow Salespeople Sales Manager(s) Variance	1 3 3 5	4.00 3.33 2.33 2.80 -1.18
16. Empathizing: Listening and people reading, understanding feelings as well as facts.	Self Clients Fellow Salespeople Sales Manager(s) Variance	1 3 3 5	3.00 3.00 2.67 3.00 -0.09
<b>Solving</b>			
17. Presenting: Delivering a persuasive presentation.	Self Clients Fellow Salespeople Sales Manager(s) Variance	1 3 3 5	4.00 3.00 3.33 2.80 -1.00
18. Showing Relevance: Providing compelling evidence as to how the customer will benefit from buying.	Self Clients Fellow Salespeople Sales Manager(s) Variance	1 3 3 5	4.00 3.00 3.33 3.00 -0.91
19. Personalizing: Getting the customer to understand and feel the value of your offer.	Self Clients Fellow Salespeople Sales Manager(s) Variance	1 3 3 5	3.00 3.00 3.00 2.60 -0.18
20. Involving: Getting the customer to participate in discovering the solution they seek.	Self Clients Fellow Salespeople Sales Manager(s) Variance	1 3 3 5	3.00 3.33 2.67 3.20 0.09
<b>Commitment</b>			
21. Summarizing: Giving benefit summaries and identifying next steps.	Self Clients Fellow Salespeople Sales Manager(s) Variance	1 3 3 5	3.00 3.00 3.00 2.80 -0.09
22. Negotiating: Resolving the customer's	Self Clients	1 3	3.00 2.67

concerns without reducing price.	Fellow Salespeople Sales Manager(s) Variance	3 5	2.00 1.40 -1.09
23. Asking: Clearly requesting the purchase and making it easy to say yes.	Self Clients Fellow Salespeople Sales Manager(s) Variance	1 3 3 5	4.00 3.00 2.67 2.60 -1.27
24. Confirming: Getting the formal commitment to buy.	Self Clients Fellow Salespeople Sales Manager(s) Variance	1 3 3 5	3.00 3.00 3.00 2.80 -0.09

## Assuring

25. Reviewing: Giving a point-of-sale summary of the value of buying plus a preview of next steps.	Self Clients Fellow Salespeople Sales Manager(s) Variance	1 3 3 5	3.00 3.33 2.67 2.40 -0.27
26. Follow Through: Supervision of the delivery and initial steps of the ownership experience.	Self Clients Fellow Salespeople Sales Manager(s) Variance	1 3 3 5	3.00 3.00 3.00 2.60 -0.18
27. UpServing: Adding value after the sale, increasing customer satisfaction.	Self Clients Fellow Salespeople Sales Manager(s) Variance	1 3 3 5	3.00 2.33 2.67 2.80 -0.36
28. Recovery: Smoothly resolving problems and retaining the customer's loyalty.	Self Clients Fellow Salespeople Sales Manager(s) Variance	1 3 3 5	3.00 3.00 3.00 3.40 0.18

## Managing

29. Resources: Using technology and other resources to improve your sales effectiveness.	Self Clients Fellow Salespeople Sales Manager(s) Variance	1 3 3 5	3.00 3.00 3.00 3.20 0.09
30. Information: Keeping and using sales records to manage yourself.	Self Clients Fellow Salespeople Sales Manager(s) Variance	1 3 3 5	3.00 3.00 2.67 3.00 -0.09
31. Growth: Learning and improving, becoming a greater resource to others.	Self Clients Fellow Salespeople Sales Manager(s) Variance	1 3 3 5	3.00 3.00 3.00 3.60 0.27
32. Motivation: Getting yourself to do what needs to be done when it needs to be done, whether you feel like it or not and still doing it well. (Self-Leadership)	Self Clients Fellow Salespeople Sales Manager(s) Variance	1 3 3 5	4.00 3.00 3.33 3.60 -0.64

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