

## SALES MANAGER'S EVALUATION GUIDE

### SECTION II: CONSULTATIVE SELLING SKILLS AND ABILITIES

Sales is both an art and a science. A “good” salesperson has honed his/her skills through a combination of professional development, professional coaching and continuously practising what they've learned.

In today's business environment customers expect top notch sales professionals to create value in every sales interaction. This section outlines the essential skills that sales professionals must master in order to achieve success in their sales career.

#### SECTION OUTLINE

- 2.1 New business development
- 2.2 Planning the sales call
- 2.3 Consultative skills
- 2.4 Questioning skills
- 2.5 Listening skills
- 2.6 Written skills
- 2.7 Presenting solutions and options
- 2.8 Negotiating skills
- 2.9 Handling buyer concerns
- 2.10 Gaining commitment
- 2.11 After sales service and follow-up skills
- 2.12 Relationship building skills
- 2.13 Customer value creation
- 2.14 Account management skills
- 2.15 Advanced professional skills
- 2.16 Additional criteria

#### RATING SCALE

- 0 = Rating not applicable or this category is not part of the job function
- 1 = Lowest score but with the greatest potential for development
- 2 = Requires development but with above average potential for development
- 3 = Adequate score with an average potential for development
- 4 = Above adequate score with a lesser potential for development
- 5 = Outstanding score with the least potential for development

<b>Section I I Consultative Selling Skills and Abilities</b>				
	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<b>2.1 New business development</b>	<b>Representative</b>	<b>Manager</b>	<b>Combined Rating</b>	<b>Development Opportunity</b>
<input type="checkbox"/> Researches sources for developing prospects (directories, online databases, old customer lists, Internet etc.)	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Uses referrals to develop new prospects	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Researches general information about prospects to determine potential and qualifies prospect	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Adds, updates and replenishes prospects for "sales funnel" system	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Manages sales funnel and moves customers from one stage to the next (e.g. suspect, prospect, hot one)	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/>	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/>	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<b>Total score for this section:</b>				
<b>2.2 Planning the sales call</b>				
<input type="checkbox"/> Secures telephone/inperson appointments with the decision-maker(s) using a compelling opening statement	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Prepares/collects/personalizes all sales support materials (brochures, testimonials, contracts, Powerpoint presentations etc.)	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Identifies needs/opportunities and plans a variety of questions in advance of the appointment	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Sets the sales call objectives (primary, secondary etc.)	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Analyzes research data about the customers'/prospect's company (e.g. size, employees, divisions, products etc.)	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/>	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/>	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<b>Total score for this section:</b>				

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	1	2	3	4
<b>2.3 Consultative skills</b>	<b>Representative</b>	<b>Manager</b>	<b>Combined Rating</b>	<b>Development Opportunity</b>
<input type="checkbox"/> Establishes and builds credibility with any prospect/customer	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Communicates sincerity to help prospect benefit through mutually beneficial relationship	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Utilizes compliance principles (e.g. rapport, reciprocity, reason, scarcity etc) during the consultative visit	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Empathizes and appreciates customer's viewpoint	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Gets customer to express his needs, concerns, expectations and success criteria	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Secures customer's agreement to call objective	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Confirms customer's commitment through every step of sales process	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Outlines and communicates clearly what the next steps/actions will follow in the consultative process	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/>	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/>	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<b>Total score for this section:</b>				

<b>Section I I Consultative Selling Skills and Abilities</b>				
	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<b>2.4 Questioning skills</b>	<b>Representative</b>	<b>Manager</b>	<b>Combined Rating</b>	<b>Development Opportunity</b>
<input type="checkbox"/> Asks effective sales questions (open, closed, clarifying and expanding)	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Focuses discussion on the interests/needs of the customer	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Encourages responses through body language (e.g. leaning forward etc.) and other verbal cues	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Involves the customer fully (e.g. ask the customer to identify the benefits of your product/service)	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Uncovers customer's selection criteria, budgets and other influencers/decision-makers	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/>	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/>	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<b>Total score for this section:</b>				
<b>2.5 Listening skills</b>				
<input type="checkbox"/> Listens actively for facts and customer priorities during the sales call	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Uses effective feedback skills (e.g. paraphrasing, summarizing etc.) to check customer's understanding	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Resists the temptation to interrupt the customer or take notes while customer is talking	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Reconfirms customer's needs frequently through feedback (e.g. paraphrasing, summarizing etc.)	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/>	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/>	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<b>Total for this section:</b>				

<b>Section I I Consultative Selling Skills and Abilities</b>				
	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<b>2.6 Written skills</b>	<b>Representative</b>	<b>Manager</b>	<b>Combined Rating</b>	<b>Development Opportunity</b>
<input type="checkbox"/> Possesses good grasp of grammar, punctuation, phraseology etc.,	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Writes effective sales letters, emails etc., to customers	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Develops clear, effective written proposals in response to specific criteria (e.g. RFPs, tenders etc.)	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Develops content by focusing on business concerns and how it meets customer needs	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Uncovers customer's selection criteria, budgets and other influencers/decision-makers	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/>	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<b>Total score for this section:</b>				
<b>2.7 Presenting solutions and options</b>				
<input type="checkbox"/> Matches products/services to customer needs/opportunities	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Prepares a comprehensive, smooth and persuasive sales presentation	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Uses visual presentation aids and tools (e.g. Powerpoint, LCD panel etc.)	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Speaks confidently to small or large groups of customers	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Communicates value proposition (what value you are bringing to the customer)	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Adjusts presentation or can change direction	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/>	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<b>Total for this section:</b>				

<b>Section I I Consultative Selling Skills and Abilities</b>				
	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<b>2.8 Negotiating skills</b>	<b>Representative</b>	<b>Manager</b>	<b>Combined Rating</b>	<b>Development Opportunity</b>
<input type="checkbox"/> Focuses on the issues in negotiations and not the personalities involved	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Determines customer's negotiating style and adjusts style accordingly	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Strives for a "win-win" outcome for both the customer and company	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Focuses on the value that company's products/services bring not on price	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Limits concessions or obtains equal or larger concessions	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Fulfills promises and agreements that resulted from the negotiation	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/>	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/>	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<b>Total score for this section:</b>				

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	1	2	3	4
2.9 Handling buyer concerns	Representative	Manager	Combined Rating	Development Opportunity
<input type="checkbox"/> Anticipates possible customer objections and pre-plans responses	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Acknowledges the objection, values it and isolates the real objection	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Clarifies the objection by asking questions to probe for more information	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Detaches oneself from the objection by remaining relaxed, attentive and confident	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Addresses the objection to satisfy customer concerns (restates FAB, offers proof etc.)	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Checks for agreement that objection has been dealt with	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Offers alternatives if appropriate	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/>	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<b>Total for this section:</b>				
<b>2.10 Gaining commitment</b>				
<input type="checkbox"/> Identifies and matches various decision-making styles	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Establishes agreement and asks for the sale	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Obtains best possible terms (price, payment, delivery etc.)	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Keeps the sale closed and secures the customer's commitment to next steps	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/>	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<b>Total score for this section:</b>				

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	1	2	3	4
<b>2.11 After sales service and follow-up skills</b>	<b>Representative</b>	<b>Manager</b>	<b>Combined Rating</b>	<b>Development Opportunity</b>
<input type="checkbox"/> Upsells the customer or sets the stage for additional business	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Asks for referrals and secures testimonials to facilitate sales to new customers	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Expands the relationship with the customer and probes for additional needs	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Oversees the implementation/installation of products/services with internal partners in the process	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Stays connected with customer to provide ongoing value and strengthen customer relationship	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/>	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<b>Total for this section:</b>				
<b>2.12 Relationship building</b>				
<input type="checkbox"/> Identifies and creates an effective customer care process for each customer	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Collaborates with customer to create service standards, warranties and guarantees	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Communicates sincerity to help prospect benefit through a mutually beneficial relationship	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Treats each customer/prospect with respect, integrity and a positive attitude	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Links customers with other service/product providers in supplier network	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Supports customer initiatives (e.g. sponsorship, charities) and shows appreciation for customer's business	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/>	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<b>Total score for this section:</b>				

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	1	2	3	4
2.13 Customer value creation	Representative	Manager	Combined Rating	Development Opportunity
<input type="checkbox"/> Creates and incorporates value into every sales opportunity (e.g. cross-selling)	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Knows the value proposition of company's and competitor's products/services	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Determines what customers value and communicates value proposition to customers	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Creates and manages a customer value plan (profile, share, value opportunities)	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Leverages customer value from other departments/channels and integrates into value proposition	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Determines the value of the customer to organization	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Measures the value realized (e.g. performance vs. plan)	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/>	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<b>Total for this section:</b>				
<b>2.14 Account management skills</b>				
<input type="checkbox"/> Builds an account profile by identifying key factors (e.g. value drivers, opportunities, stakeholders etc.)	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Identifies challenges and resources in developing sales strategy to win business	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Gathers key information about stakeholders, business needs, possible barriers, new opportunities, points of leverage to to build prepare a value "case"	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Builds a value "case" to justify impact of solutions to the customer	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Follows up internally/externally to fulfill commitments to the customer	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/>	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<b>Total score for this section:</b>				

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	1	2	3	4
2.15 Advanced professional skills	Representative	Manager	Combined Rating	Development Opportunity
<input type="checkbox"/> Organizes company resources or people to work with customer's team	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Possesses ability and willingness to train new salespeople	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Leads sales meetings or takes responsibility	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Organizes sales contests, events, campaigns etc.	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/>	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/>	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<b>Total for this section:</b>				
<b>2.16 Additional criteria</b>				
<input type="checkbox"/>	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/>	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/>	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/>	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/>	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/>	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<b>Total score for this section:</b>				

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NOTES: