

SALES MANAGER'S EVALUATION GUIDE

SECTION I: KNOWLEDGE ACQUISITION AND MANAGEMENT

Before committing to a purchase decision, each customer needs to have his/her subconscious needs satisfied according to Maslow and/or Herzberg's hierarchy of needs. These needs are satisfied by knowledgeable salespeople who know their product, its applications, their industry and how the company's products/services provide value to their customers.

SECTION OUTLINE

- 1.1 Product knowledge
- 1.2 Application knowledge
- 1.3 Company knowledge and business acumen
- 1.4 Industry knowledge
- 1.5 Marketing knowledge and strategy
- 1.6 Competitive advantage
- 1.7 Strategic sales planning skills
- 1.8 Time and territory management
- 1.9 Sales and technology
- 1.10 Sales administration
- 1.11 Legal and ethicacy issues
- 1.12 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

Section I Knowledge Acquisition and Management

	1	2	3	4
1.1 Product Knowledge	Representative	Manager	Combined Rating	Development Opportunity
<input type="checkbox"/> Knows the essential sales features of products/services	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Develops technical knowledge about products/services (e.g. strengths, weaknesses, manufacturing process, etc.)	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Translates all essential features into customer benefits	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Familiarizes self with all product promotions, sales manuals and product literature	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Keeps abreast of product modifications, upgraded capabilities and service enhancements	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	
Total score for this section:				
1.2 Application knowledge				
<input type="checkbox"/> Understands how product/service fits into customer's overall operation, business plan, sales success, etc.	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Knows how the product/service is used by different customer segments	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Analyzes the products'/service's success and other financial realities of customers using product/service	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Understands the application process from the customer's standpoint and how it contributes (e.g. how does it increase sales, lower operational costs 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	
Total score for this section:				

Section I Knowledge Acquisition and Management

	1	2	3	4
1.3 Company knowledge and business acumen	Representative	Manager	Combined Rating	Development Opportunity
<input type="checkbox"/> Knows company's history, mission statement, financials and competitive advantage	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Complies with corporate policies, guidelines and procedures and adheres to standards	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Understands all company patents, trademarks, copyrights, etc.	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Understands pricing policies and profitability ratios	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Knows the financial details of the company and key customers	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	
Total score for this section:				
1.4 Industry knowledge				
<input type="checkbox"/> Knows about relevant industry standards, associations, regulatory bodies and government legislation	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Keeps current on industry trends, developments and standards	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Awareness of industry quality standards (e.g. ISO 9000, Six Sigma)	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Understands the positioning of key competitors in the industry and their influence	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	
Total score for this section:				

Section I Knowledge Acquisition and Management

	1	2	3	4
1.5 Marketing knowledge and strategy	Representative	Manager	Combined Rating	Development Opportunity
<input type="checkbox"/> Conducts informal market research	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Pursues opportunities to network, volunteer and present information about company's products/services	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Contributes to corporate marketing program and develops own marketing material/initiatives	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Creates, co-ordinates or plans merchandising, multi-media and promotional programs	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Knows about key events, shows and expositions in the industry	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	
Total score for this section:				
1.6 Competitive Advantage				
<input type="checkbox"/> Assess the value propositions of competitor's products/services	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Assess key competitor's marketshare and financial picture	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Identifies advantages and compares company's products/services to competitions	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Documents competitive research as part of his/her sales plans	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Conducts a S.W.O.T analysis	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	
Total score for this section:				

Section I Knowledge Acquisition and Management

	1	2	3	4
1.7 Strategic sales planning skills	Representative	Manager	Combined Rating	Development Opportunity
<input type="checkbox"/> Understands the corporate business plan/department objectives and his/her role in achieving them	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Analyzes and segments market/customer base in territory (profitability, account classification etc.)	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Aligns personal sales objectives with company's sales strategies/targets	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Forecasts sales results (annually, monthly etc) and predicts sales volumes by customer, product 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	
Total score for this section:				
1.8 Time and Territory Management				
<input type="checkbox"/> Creates daily, weekly and monthly action plans using the S.M.A.R.T. method and implements them	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Creates/adopts a time management system and follows it	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Classifies accounts according to their potential and allocates time accordingly for maximum profitability	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Identifies personal time wasters and determines ways to eliminate them	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Reviews previous year's results for key information (actual results vs. plan) to address any shortcomings	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	
Total score for this section:				

Section I Knowledge Acquisition and Management

	1	2	3	4
1.9 Sales and technology	Representative	Manager	Combined Rating	Development Opportunity
<input type="checkbox"/> Understands how to use basic technologies and software (e.g. contact management) to keep track of customers, appointments and activities	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Understands the implications of technology for customers and for business preferences	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Understands company's security policies	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Leverages Internet resources to assist self in sales role	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	
Total score for this section:				
1.10 Sales Administration				
<input type="checkbox"/> Generates sales administration and operational reports	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Shares relevant customer feedback with other departments and sales management	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Co-ordinates/tracks fulfillment of customer orders (e.g. inventory, interdepartmental resources)	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Identifies personal time wasters and determines ways to eliminate them	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Maintains/updates customer database information using CRM or SFA solutions	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	
Total score for this section:				

Section I Knowledge Acquisition and Management

	1	2	3	4
1.11 Legal and ethicacy issues	Representative	Manager	Combined Rating	Development Opportunity
<input type="checkbox"/> Demonstrates fair competitive practices and follows appropriate code of conduct	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Demonstrates ethical behaviour and understands what constitutes a conflict of interest	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Maintains confidentiality of customer information and uses the information for business purposes only	0 1 2 3 4 5	0 1 2 3 4 5	/10	
<input type="checkbox"/> Anticipates contingencies and inserts additional elements into the sales confirmation order/contract	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	
Total score for this section:				
1.12 Additional criteria				
<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	
<input type="checkbox"/>	0 1 2 3 4 5	0 1 2 3 4 5	/10	
Total score for this section:				

SALES MANAGER'S EVALUATION GUIDE

NOTES: