

Sales Transformation

Development Report - Sales Manager



Sales Transformation Insights

Business to business (B2B) sales is a function undergoing a comprehensive and rapid transformation. Many sales functions report a struggle to navigate this transformative experience, with sales productivity and talent gaps being the two most reported challenges.

Working with our sales assessment customers, SHL have identified three common principles that sales organizations will need to address in the modern, digital sales segment:

1. The External Environment is radically different

Data and analytics are at the heart of the global sales transformation. Increasingly, the most successful sales organizations demonstrate effective use of analytics tools in their sales processes. In parallel, a majority of B2B sales functions have shifted their model from traditional to digital sales interactions, and 89% of sales leaders in those functions expect the digital transition to accelerate.

2. Customer Behavior has changed

As a result of the marked increase in digital sales interactions, the role of the sales professional is changing. More than half of the sales process is completed before a sales-person gets involved for the first time, and over 70% of B2B buyers state a preference of digital self-service and remote interactions. This is countered by buyers needing sellers to collaborate with them in new ways – helping to personalize the offer, and simplify the decision-making process.

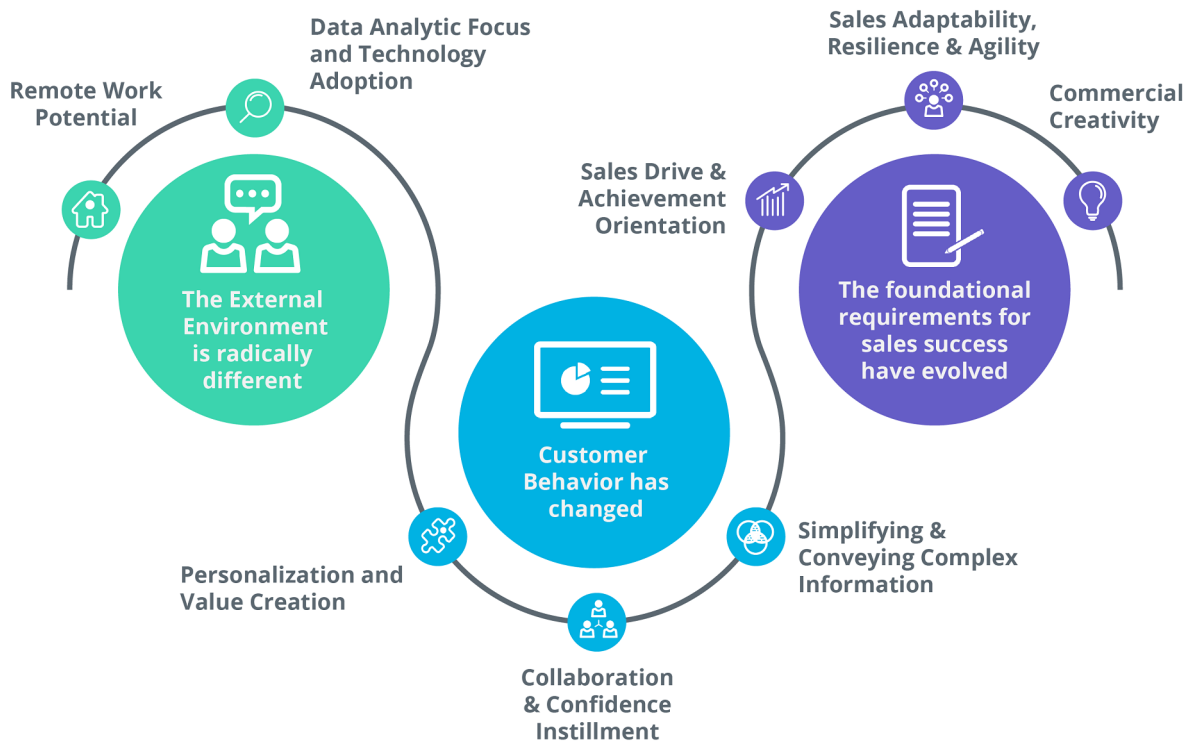
3. The Foundational Requirements for sales success have evolved

In this rapidly changing environment, it is unsurprising that the competency building blocks required to be a top sales performer are also changing. SHL assessed more than 11,000 B2B sales professionals, with two key findings:

- Some ‘traditional’ competencies remain critical – for example sales drive, sales focus and achievement orientation.
- A new set of emerging competencies differentiate high performers – for example adaptability and resilience.

SHL's Sales Transformation Model

Leveraging our insight and research, SHL have developed a tri-factor behavioral model that focuses on the key competency drivers for success against each of these three key segments.



Commercial Analytics and Technology Adoption – developing, evaluating and leveraging technical tools and devices to enhance commercial execution; a commitment to technology systems and Customer Relationship Management (CRM) software; and the use of data to identify patterns and trends to assist with setting prices, finding and securing new business, and establishing strategic, long term partnerships with customers.

Remote Work Potential – the tendency to remain focused on key work habits; persisting to close leads; managing resources online; following organizational guidelines around work in a remote setting; maintaining enthusiasm; and effectively working autonomously.

Personalization and Value Creation – establishing and utilizing effective socialization; the ability to create rapport; proactively connecting customers to targeted information; and creating tailored messages and solutions that resonate with customer needs and challenges.

Simplifying and Conveying Complex Information – the ability to simplify complex concepts and ideas while ensuring information is delivered to clients in a timely and quality manner. Sellers that are skilled in this area make themselves available to assist customers in synthesizing information from multiple sources and help determine the key points of understanding required to enable buying decisions.

Collaboration and Inspiring Customer Confidence – creating a feeling of partnership with the client; building consensus across multiple stakeholders; and helping clients build confidence in their ability to make smart buying decisions, which all foster a trusting relationship that establishes a positive environment for future sales opportunities.

Sales Adaptability, Resilience, and Agility – quickly adapting to ambiguity; managing internal and external change; controlling negative emotions; remaining productive under pressure; and viewing future opportunities with a positive mindset.

Sales Drive and Achievement Orientation – enthusiasm for identifying and securing new clients; seeking and completing demanding sales quotas; and striving to outperform colleagues' sales.

Commercial Creativity – considering the competitive landscape, revenue, costs, and risks when choosing sales strategies; proactively identifying and acting on strategic opportunities; and being open to innovative methods to secure business.

Sales Leadership – leading groups of enterprise sales professionals and delegating work based on skills and potential; motivating team members to reach stretch sales goals; setting clear expectations and standards for performance; monitoring work; and coaching others to develop their full potential.

Sales Transformation Development Report - Sales Manager

Candidate name:

Sample Candidate

Disclaimer

Information enclosed on these pages is confidential in nature and is intended only for the person(s) to whom it pertains or other authorized individuals.

You must not rely on the information in the report as an alternative to certain advice from an appropriately qualified professional. If you have any specific questions about any specific matter you should consult an appropriately qualified professional.

Instructions

This report is designed to give you information about your relative strengths and weaknesses on the competencies known to be important for success in sales organizations that are going through or have undergone a transformation of the sales function. In addition, the report provides valuable on-the-job tips and suggestions to help you excel in the workplace.

The score that you receive describes how your responses compared against our database of responses consisting of your peers. The assessment that you have taken has been scientifically validated by up to 30 years of statistical data collection and analysis. People who score higher on the dimensions tend to perform better on the job in the key areas outlined in the report. The developmental tips that you receive are intended to help you improve your skills for each specific competency.

All of us, regardless of our scores, can improve our job performance by following appropriate developmental solutions and strategically focusing on areas that may require improvement. A commitment to personal improvement signifies initiative and developmental planning, both of which are important to job performance.

Try using this feedback to formulate specific development plans that relate to your work goals and objectives. Don't try to do everything at once, as personal development does not happen overnight. If you score in the 'Red Zone', this may be an area where you want to focus your developmental efforts. Even if you score well it is still important for you to use the developmental tips to leverage your strength in this competency.

Individual Scores



Commercial Analytics and Technology Adoption



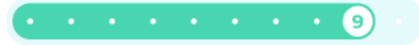
This is a measure of the ability to adopt and utilize innovative technologies, coupled with the tendency to have a data-driven perspective to assist with sales. The measure is characterized by: developing, evaluating and leveraging technical tools and devices to enhance commercial execution; a commitment to technology systems and Customer Relationship Management (CRM) software; and the use of data to identify patterns and trends to assist with setting prices, finding and securing new business, and establishing strategic, long term partnerships with customers.

You are likely to be as comfortable as others with using technical tools to achieve commercial objectives. You are willing to learn new software systems (e.g., Customer Relationship Management) that can assist you in sales roles. You are likely enthusiastic to understand how new digital or technological tools can help further commercial objectives but you may prefer traditional methods in some parts of your work. You may feel comfortable communicating through technological systems but may, at times, experience some user difficulties with the systems. You are likely to prefer critically evaluating information with commercial data analytics, facts/figures, and research to guide your decisions rather than relying on instincts.

- **Stay informed of new technological systems that assist professionals in sales by subscribing to media outlets (e.g., professional associations, industry publications, press articles) that report on innovative systems used in your field.**
- **Join an online forum regarding your most used software system and discuss tips and get advice to enhance your skills with the program while also sharing your knowledge with others.**
- **Secure training materials in your department around data analytics and set aside time to study those recommendations to further your knowledge and, potentially, add to the training materials with analytical best practices which were successful for you and your clients.**
- **Identify two ways that you could best leverage and apply CRM data to your own accounts to enhance your sales performance. Try using this new data in two upcoming opportunities.**



Remote Work Potential



This is a measure of commercial aptitude in a virtual sales environment and the potential for sales success when working remotely over a long period of time. This is characterized by: the tendency to remain focused on key work habits; persisting to close leads; managing resources online; following organizational guidelines around work in a remote setting; maintaining enthusiasm; and effectively working autonomously.

You are likely to excel in a remote sales role. You are likely to remain solely focused on your sales goals and be willing to persist through any obstacles to achieve them. You are likely to adhere to organizational policies surrounding remote work practices and are likely to prefer the autonomy offered by a virtual setting. You are likely to work in a systematic and organized manner regardless of whether you are in an office or a remote setting. You are likely to be meticulous with your efforts in virtual work environments and likely to secure business opportunities even when substantial obstacles are present.

- **Write a "How To" guide on being a successful sales professional while working from home and share it with your team for their consideration. Discuss if there are any additional suggestions you could add to make sure it is comprehensive.**
- **Transparency maximizes accountability. Set up your calendar to be open to your team and clients to allow full transparency for when you are available to accommodate any meeting requests in a virtual setting.**
- **Review your performance on your task list weekly with your manager and find opportunities to improve your productivity and efficiency with remote selling skills and behaviors.**



Personalization and Value Creation



This is a measure of the ability to partner closely with clients and prospects by establishing trusted networks and relationships that drive value for the buyer. This measure is characterized by: establishing and utilizing effective socialization; the ability to create rapport; proactively connecting customers to targeted information; and creating tailored messages and solutions that resonate with customer needs and challenges.

You are as likely as others to seek the best value for clients through practical, cost effective, and/or bespoke solutions. You are likely to seek to build rapport and trust with your potential and existing clients to drive “win-win” partnerships for both organizations. At times, you are likely to control the sales opportunities and can direct the clients to the best solution for their needs. You may appear humble and sociable to drive a positive, professional relationship with your clients while demonstrating genuine concern for their needs.

- **Be explicit and honest with your clients about what you and your organization can and cannot do to meet their needs.**
- **Drive the clients proactively to those solutions that will create the best value for them and be sure to emphasize the value it will bring.**
- **For your next lead, create a detailed business case that clearly articulates the merits of your solution in the business language and context the client cares about. Share that business case with the client and agree on the success metrics that will underpin your partnership.**
- **Embrace creativity when preparing for the next client interaction. Plan to speak as little as possible while providing value only to what your client cares about most. Share the plan with high performing peers to get their feedback on your approach.**



Simplifying and Conveying Complex Information



This is a measure of identifying, categorizing, and communicating complex information in a manner that is easy to understand for enterprise clients. This is characterized by: the ability to simplify complex concepts and ideas while ensuring information is delivered to clients in a timely and quality manner. Sellers that are skilled in this area make themselves available to assist customers in synthesizing information from multiple sources and help determine the key points of understanding required to enable buying decisions.

You are likely to seek to understand the needs of clients and may expend moderate efforts to share sources of information that are relevant to their needs. You are likely to speak up when you feel a client is using inaccurate or misleading information but may at times not fully correct inaccurate information. You may provide the clients with requested documentation from one or two sources and would likely direct the clients to the information that would have the most applicability to their needs. At times, you will evaluate and convert complex or lengthy material into easily understood and succinct concepts for the client.

- **Practice speaking up in internal meetings when you feel that you have an idea or strategy that will add value to your organization. Perfect this outspoken style to ensure you're communicating with clients on what they should and should not be considering when making their decisions.**
- **Attend trainings for your organization's products and services and try writing short summaries of the key points of information that can guide a client in purchasing those items that will best fit their needs.**
- **After a client has secured business with your organization, seek feedback on the information that they felt was most helpful in guiding their decision to partner with you and your organization.**
- **Find an opportunity to leverage "thought leadership" tools and strategies to help demonstrate and simplify to clients what they should be considering. Then guide the client to what you know to be best practice, given previous experience and demonstrated results.**



Collaboration and Inspiring Customer Confidence



This is a measure of the tendency to create a sense that the sales process has been collaborative, leaving the customer with a feeling of confidence. This is characterized by: creating a feeling of partnership with the client; building consensus across multiple stakeholders; and helping clients build confidence in their ability to make smart buying decisions, which all foster a trusting relationship that establishes a positive environment for future sales opportunities.

You are more likely than others to successfully work in collaborative relationships with your clients. You are likely to develop good working relationships with ease and sincerity. You are likely to invest substantial effort to encourage and support clients with their decision-making processes and are likely to give the appropriate concern for the clients' needs being met.

- **Select a client that you have a good working relationship with and ask them to provide feedback on the various stages of the sales cycle so as to document the specific actions that made them feel confident your solution was the best fit for them. Following this feedback, disseminate that information with your team for group learning.**
- **Find a client that you've had a lengthy positive partnership with for both your organizations and approach them to write or record a testimonial about your organization's products and services. In addition to the organization's product and services, ask that they also bring attention to the relationships that were formed throughout the sales cycle.**
- **Keep a log of your clients and some of their professional and personal interests. Review this information before correspondence to show that you remember details about the client and their organization.**
- **Communicate the expectation for collaboration as the standard. Set mutual expectations for the partnership by explaining what a client should expect in terms of back and forth communication.**



Sales Adaptability, Resilience, and Agility



This is a measure of the likelihood of adapting to a rapidly changing industry and tolerating the pressure of a sales role. This measure is characterized by: quickly adapting to ambiguity; managing internal and external change; controlling negative emotions; remaining productive under pressure; and viewing future opportunities with a positive mindset.

You are likely to flourish and adapt well to the constant changes in a business-to-business sales environment. You tend to enjoy a variety of goals in your sales roles and are likely to utilize novel methods to close your leads. You are likely to navigate ambiguous situations with ease and control and guide the buying process for your clients amidst uncertainty. You are likely to experience less stress than others when innovative techniques are suggested or implemented for sourcing or closing new business opportunities. You may thrive off the pressure to fulfill sales goals and are motivated by stretch sales quotas.

- While you may be open to or even enjoy change within your work, others may be hesitant and cautious with new methods or work tasks. When presenting new ideas for your team, focus on the added value of the new system or method and how it will assist in achieving your team's sales goals.
- While implementing new techniques in your sales role, keep a record of your attempts to evaluate the strengths and weaknesses of your varied approaches.
- Work with your manager to develop guidelines for managing the stress of a sales role and create a few developmental exercises that can be used by sales professionals in your organization to bolster their resilience and agility that are required in the sales industry.
- In the face of failure or change, focus not on the feelings of the situation but the information you gained from the experience. Write down what you learned and how it will help you in upcoming interactions to get to your goal.



Sales Drive and Achievement Orientation



This is a measure of the tendency to be motivated by and remain focused on achieving sales goals. This measure is characterized by: enthusiasm for identifying and securing new clients; seeking and completing demanding sales quotas; and striving to outperform colleagues' sales.

You are likely to display moderate enthusiasm for setting and pursuing challenging sales goals. You are likely comfortable with a sales culture that is high energy and fast paced but may, at times, set your own work pace at a more casual level. You are likely comfortable working independently to develop and attend to different opportunities when required. You may not display high energy levels all the time, but are likely to show determination when working on significant or high visibility tasks. You are likely willing to compete with your peers but may not be highly motivated in a competitive environment.

- **Work with your manager to improve your performance of a key metric (e.g., leads-to-sales conversion ratio) over the course of a year to challenge yourself to be the best on your team.**
- **Create a list of items that impact your initiative and motivation at work. Look for methods that can enhance these items further so you can feel your desire to fulfill your goals is self-driven.**
- **To build momentum and motivation, start your day with tasks/goals that are considered "small" or "easy" wins. Leverage the momentum you build from completing those tasks to drive better results with higher impact goal attainment.**
- **Sketch out what a perfect quarter would look like from a commercial performance perspective. Then identify the actions and key performance indicators necessary in order to achieve this. Develop a complementary strategy to hold yourself accountable for this perfect quarter.**



Commercial Creativity



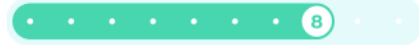
This is a measure of the tendency to consider all commercial factors in the decision-making process. This measure is characterized by: considering the competitive landscape, revenue, costs, and risks when choosing sales strategies; proactively identifying and acting on strategic opportunities; and being open to innovative methods to secure business.

You are as likely as most to identify and secure new business opportunities. You are likely to be motivated and energetic in closing your new opportunities and show an awareness of the external factors that can impact business-to-business partnerships. You are likely to be knowledgeable about your products and services and understand the factors that differentiate them from your organization's competitors. You are likely to think ahead and consider adapting your sales strategy based on its effectiveness.

- **Outline the products and services offered by your organization's biggest competitor and present that information to your manager. Use the competitor analysis for strategizing what your company could do to win business from them.**
- **Perform a cost-benefits analysis on your two favorite sales strategies and identify any methods for decreasing your costs, effort, and time while increasing the revenue from those strategies.**
- **Identify 2-3 competitors that you frequently encounter when securing business and list 2-3 key differentiators of your organization's products and services over those suppliers' products and services.**
- **Participate in your industry's major conferences to learn the emerging trends that can impact your business and, if the opportunity arises, expand your network with potential clients and partners.**



Sales Leadership



This is a measure of traits that lead to success in a sales management or leadership role. These traits are often characterized by: leading groups of enterprise sales professionals and delegating work based on skills and potential; motivating team members to reach stretch sales goals; setting clear expectations and standards for performance; monitoring work; and coaching others to develop their full potential.

You are likely to be very content with leading and supervising a team of sales professionals. You are likely to accurately assess your direct reports' capabilities and potential, which will result in the effective delegation of tasks. You are likely to seek and understand all facets of motivation from your team and are likely to follow formal processes to appraise, monitor, and coach performance. You may foster a team environment with competitive targets and will support your direct reports to achieve all their goals.

- **Foster a team that is collaborative by rewarding intra-team mentoring and knowledge/information sharing. Competition can be motivating for sales roles, but make the competition take place against your organization's competitors rather than between your own team members.**
- **Assist in the establishment of cross-departmental relationships with your sales team and other departments. Introduce sales members to resources in Finance, Marketing, and other departments that can help the organization close deals. Once those relationships are established, your sales team can independently seek help from those individuals in the future to help them close their deals.**
- **Closely monitor any emerging trends coming out of your industry to ensure that you and your team are prepared and trained for the newest developments and how to take advantages of those emerging opportunities.**
- **Participate in defining sales roles in your organization with Sales Managers and HR teams helping to identify critical competencies for success.**



Management Judgment



This is a tendency to make good judgments about how to effectively respond to work situations. This is determined by scores derived from the candidate's responses to questions regarding situations one would likely encounter as a manager.

Your response profile concerning judgments about how to manage staff communication, employee development, and employee motivation is not fully aligned to judgments made by highly effective managers. The dissimilarities between the profiles suggest that you may have difficulty achieving success as a manager.

- **Learn about your organization's goals and values and consider how the decisions you make fit within those goals and values.**
- **Listen to others to gather information before making decisions.**
- **Seek feedback on how patient and consistent you are in your dealings with others.**