

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 organisations 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 organisations 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 Behaviour 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 personalise the offer, and simplify the decision-making process.

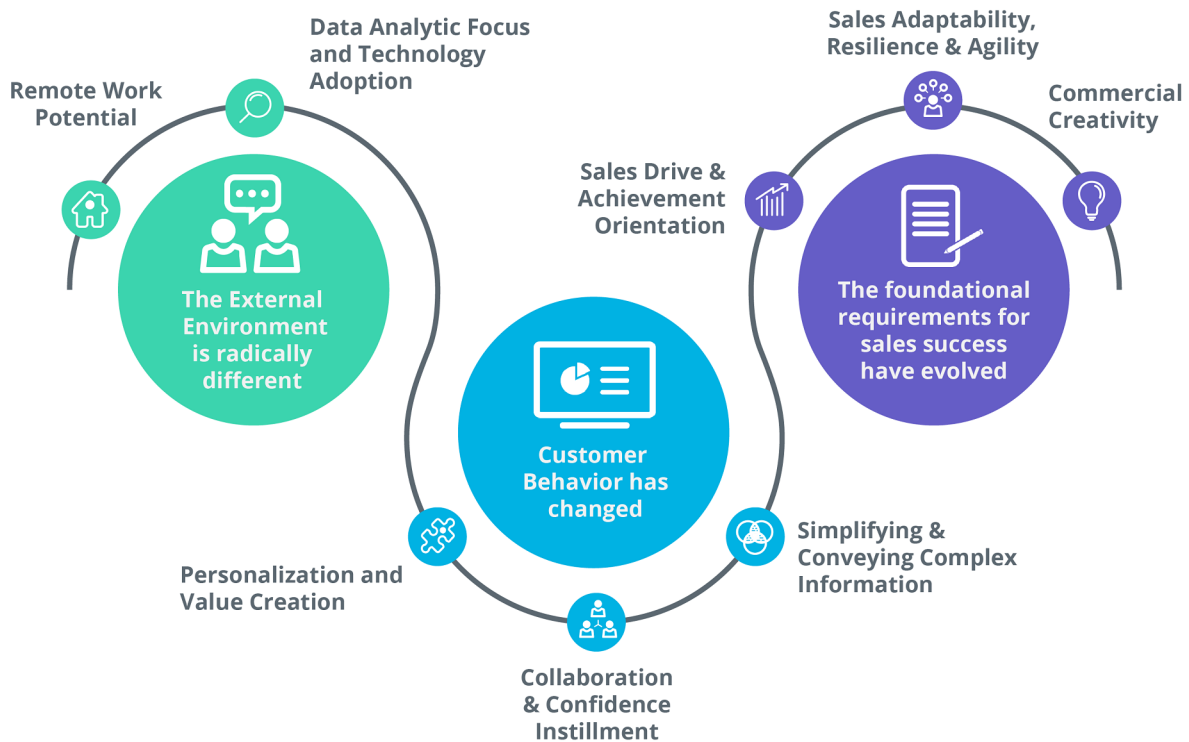
3. The Foundational Requirements for sales success have evolved

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 behavioural 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 organisational guidelines around work in a remote setting; maintaining enthusiasm; and effectively working autonomously.

Personalisation and Value Creation – establishing and utilising effective socialisation; 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 synthesising 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 authorised 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 organisations 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.

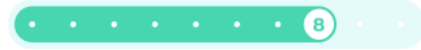
All of us, regardless of our scores, can improve our job performance by following appropriate developmental solutions and strategically focusing on areas that may require improvement. A commitment to personal improvement signifies initiative and developmental planning, both of which are important to 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 utilise innovative technologies, coupled with the tendency to have a data-driven perspective to assist with sales. The measure is characterised 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 very likely to be comfortable using technical tools to achieve commercial objectives. You are eager to learn new software systems (e.g. Customer Relationship Management) that can assist you in sales roles and, at times, will champion these technical tools to your organisation and/or clients. You are likely to be enthusiastic about understanding how new digital or technological tools can help further commercial objectives in all aspects of your work and tend to feel at ease communicating through technological 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 and are naturally inclined to work with statistics and numbers to close enterprise sales.

- **Establish meetings in your sales department to share knowledge and discuss how technological or analytical systems could help close sales or assist in new services and products for your organisation. If the opportunity presents itself, coach your peers on some of the systems in which you're adept.**
- **While managing risks, try to be an early adopter and champion of new technology related to your field and implement a pilot test to evaluate the success of the new system.**
- **Attend conferences on technological systems or analytics that you feel will provide you with the best opportunities to learn more about the innovative practices that can assist with your sales team.**
- **Work with the CRM and Marketing team to drive improvements in marketing, lead sourcing strategies, and lead conversion.**



Remote Work Potential

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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 characterised by: the tendency to remain focused on key work habits; persisting to close leads; managing resources online; following organisational guidelines around work in a remote setting; maintaining enthusiasm; and effectively working autonomously.

You are not likely to excel in a remote sales role. You may have difficulties remaining focused on closing sales in a virtual setting. You are likely to disregard organisational guidelines or rules related to working remotely and may work in a manner that is less organised and systematic than when you are working in an office. You are unlikely to be comfortable with the autonomy required in a remote setting and may not persist with difficult tasks when facing obstacles.

- **To the extent possible, create a space within your living arrangements that will have minimal disruptions and allow you to focus on your work.**
- **Develop a detailed task list before beginning your work each day to ensure you are aware of what you must accomplish.**
- **Research your organisational guidelines and policies around virtual work and develop a plan to adhere to those requirements.**
- **Seek out best practices from peers on your team to understand how they have been able to successfully manage distractions and stay motivated while working remotely.**



Personalisation 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 characterised by: establishing and utilising effective socialisation; 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 organisations. 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 organisation 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 emphasise the value they 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

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This is a measure of identifying, categorising, and communicating complex information in a manner that is easy to understand for enterprise clients. This is characterised 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 synthesising information from multiple sources and help determine the key points of understanding required to enable buying decisions.

You are very likely to understand the needs of clients and are likely to expend substantial effort to ensure the clients have and understand all the information they need to make decisions. You are very likely to inform the client when you feel the client is using inaccurate or misleading information and are likely to work to get accurate information to the client. If needed, you are likely to evaluate and convert complex or lengthy information into easily understood and succinct concepts for the client. Not only are you likely to provide many resources and documentation from a variety of sources that will assist the client's decision-making process, but you are likely to also synthesise the materials and point out the most relevant content to ensure the client can easily understand the information.

- **Proactively set up meetings with clients that are evaluating different purchasing options. Walk them through the most complex information to ensure they understand, and provide clarity when they have difficulty grasping the concepts.**
- **Evaluate your past sales successes with a variety of clients and identify what documentation assisted those clients the most in their decisions. Develop file sets for prospective clients that fulfil the documentation for a variety of needs.**
- **Consider participating in cross-departmental groups and meetings that go over new or potential products and services and make suggestions on what types of complementary documentation can help you and your team meet the needs of your clients through proper information being delivered.**



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 characterised 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 likely to work well in collaborative relationships with your clients. You are likely to expend moderate effort to develop and foster good working relationships with your clients and tend to show a fair amount of concern for your clients and their needs. You are likely to enjoy affiliating with your clients, but at times, may be unable to inspire a client's complete confidence in the buying process.

- **Before meeting with a prospective client for the first time, research the organisation and individual to have a general understanding of their perspective and objectives.**
- **Always listen attentively to the client during video or phone-based meetings. To demonstrate your active listening, summarise the major key points of the meeting from the client's perspective at the conclusion of the meeting.**
- **Speak positively in situations that you and a client disagree on. Try to convey a sense of unity by expressing buy in with the client's choice and continue to stress a common purpose if you must voice any disagreement with the client. Frame your disagreements based on previous experience with other customers facing similar challenges to have them view you as a trusted resource.**
- **Give your client an example of how collaboration between your organisation and a different customer led to exciting outcomes. Ask the client for a commitment to a similar level of collaboration.**



Sales Adaptability, Resilience, and Agility



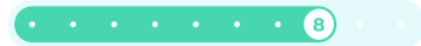
This is a measure of the likelihood of adapting to a rapidly changing industry and tolerating the pressure of a sales role. This measure is characterised by: quickly adapting to ambiguity; managing internal and external change; controlling negative emotions; remaining productive under pressure; and viewing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

You are likely to adapt well to the constant changes in a business-to-business sales environment. You are likely to use traditional sales methods but may employ new techniques if the established methods are ineffective. You are likely to seek more information in ambiguous situations to control and guide the buying process for your clients amidst uncertainty. You are likely to appreciate stability in your sales role, but are also likely to appreciate variety and introduce new tasks and goals at times. You are likely to be comfortable with your sales goals but may become stressed at times if the goals are at risk.

- **When someone provides feedback or criticism on your sales methodologies, take the time to ask follow-up questions. Attempt to understand their perspective and how you can adjust your techniques to achieve your sales goals.**
- **Reflect on the times when you have felt significant pressure to achieve your sales targets. Consider the methods you utilised to manage these situations successfully and create a list to help you manage future tasks when you're feeling stressed.**
- **When faced with a substantial change in your role or tasks, challenge yourself to identify the positive steps that the change could provide and focus on those strengths rather than thinking of the worst case scenario or risks associated with the change.**
- **Consider the objective data and information that was gleaned from the recent change or lost sale. What objective data do you have to improve your next opportunity?**



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 characterised by: enthusiasm for identifying and securing new clients; seeking and completing demanding sales quotas; and striving to outperform colleagues' sales.

You are likely to be motivated and take pride in reaching difficult sales goals and pursuing challenging sales targets. You are likely to be energised by achieving stretch sales goals. You tend to work to high standards and your drive for results may be motivated by your desire to outperform peers. You are likely to prefer a strenuous and fast-paced sales environment. You are likely to prefer to work independently to complete your goals and are unlikely to require direction or prompting to drive your performance.

- **Create a standing meeting with your sales peers where you all can cultivate different ideas and methods to share with each other to assist in different stages of the sales cycle.**
- **When establishing your quarterly or annual goals with your team and manager, determine what goals would be considered exceeding expectations in your role and openly advocate that you'd like to set your goals at those levels.**
- **Determine what you enjoy doing at work and what excites and interests you about your day-to-day activities. Identify those projects and responsibilities that align more to these motivators and champion yourself to be responsible for those goals.**
- **Create a 2-year plan for your top 10 accounts with action items for how you plan to achieve the plan and what moments over the next 2-years you plan to leverage.**



Commercial Creativity



This is a measure of the tendency to consider all commercial factors in the decision-making process. This measure is characterised 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 more likely than most to identify and secure new business opportunities. You are likely to be very motivated and energetic in both growing your current partnerships and closing your new opportunities. You are also likely to show a comprehensive awareness of the external factors that can impact business-to-business partnerships. You are likely to possess detailed knowledge of your products and services and how you differentiate from your organisation's competitors. You are likely to employ innovative sales strategies instead of conventional sales techniques.

- **Participate in your industry's major conferences to share some of your positive experiences driving your organisation's value while also learning the emerging trends that can impact your business.**
- **Identify the competitor that you frequently have to deliver against with prospective clients. Work with your manager to discuss strategies to further differentiate and enhance your products and services above that particular supplier. Once complete, share the strategies with your team.**
- **Subscribe to newsletters and forums that describe the external factors (e.g. geographies, macroeconomic conditions) that can impact business-to-business partnerships so you can stay aware of the market conditions and plan your goal attainment accordingly.**
- **Work with your peers to share your most creative and out-of-the-box solutions to client issues to see if they can replicate your successes with novel methodologies.**



Sales Leadership

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This is a measure of traits that lead to success in a sales management or leadership role. These traits are often characterised 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 unlikely to be content with leading a team of sales professionals. You are unlikely to pursue an understanding of what motivates your sales team and may delegate work that is not aligned with the best fit between tasks and resources. You are not likely to support your direct reports' efforts to build their revenue streams and may lack the desire to guide and lead your team, instead letting your sales professionals lead themselves independently. You may miss opportunities to coach your team for their developmental and professional goals while also failing to recognise and appreciate their accomplishments.

- **Motivate your team by connecting their current goals to their trajectory of career growth and outcome. Develop the connections between achieving short term and small wins and their personal career growth.**
- **Develop methods to praise your sales team for all successes. Bringing emphasis to small wins (e.g. securing a meeting with a prospective client) will provide more frequent opportunities to boost the productivity and morale of your team.**
- **Provide one on one training and appraisal to your sales professionals on a quarterly basis. The frequency of these meetings will allow you to identify areas of development for your sales professionals, to properly communicate what is expected of them and how those goals are measured, and ensure you have the best alignment between the resources on your team and your organisation's business development strategies.**



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 be likely to encounter as a manager.

Your response profile concerning judgments about how to manage staff communication, employee development, and employee motivation is somewhat similar to judgments made by highly effective managers. The average match between the profiles suggests that you are somewhat likely to be a successful manager.

- **Learn about your organisation'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.**