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# Sales Transformation Development Report

Individual Contributor

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# 1. Introduction

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

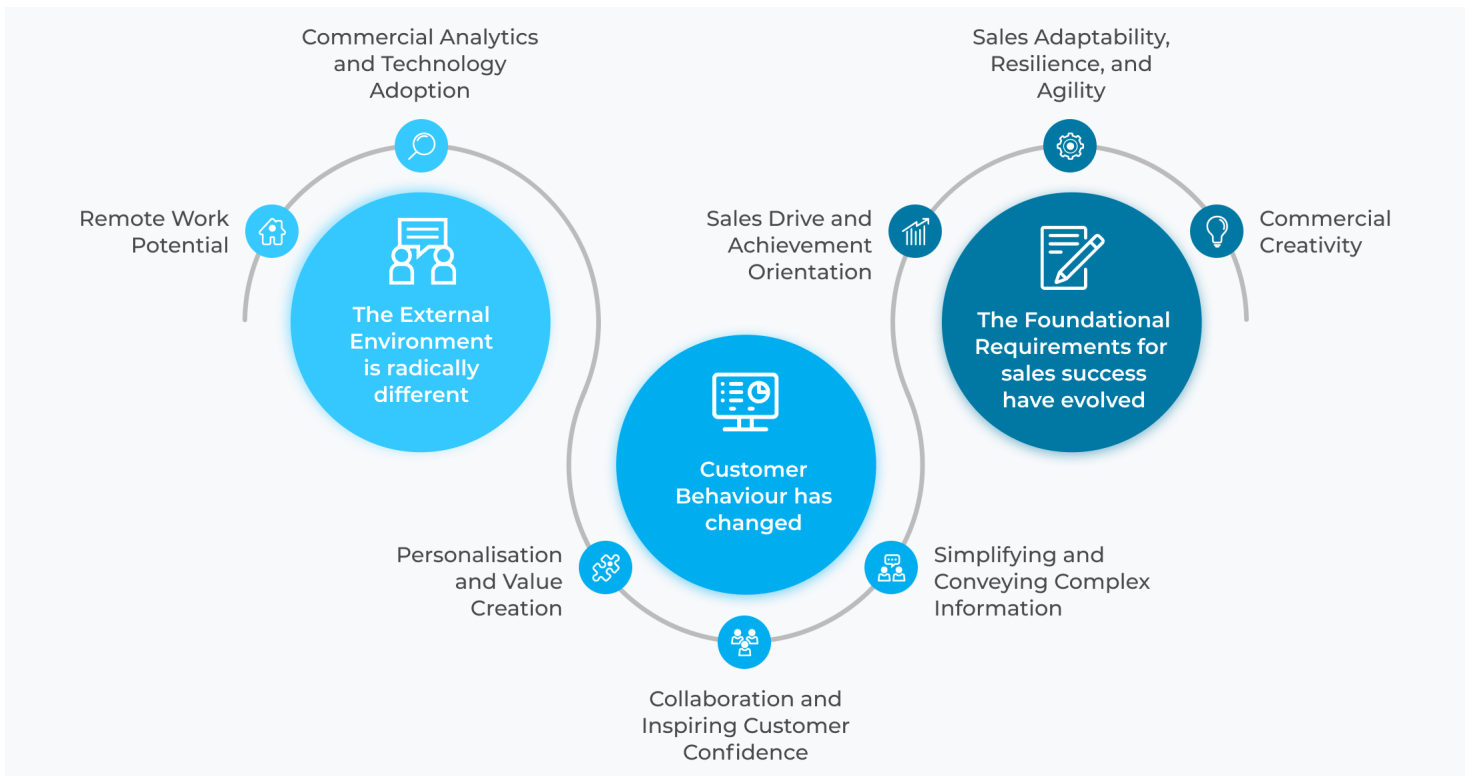
In this rapidly changing environment, it is unsurprising that the competency building blocks required to be a top sales performer are also changing. SHL assessed more than 11,000 B2B sales professionals, with two key findings:

- 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.

## 2. 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.



### 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 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 to be enthusiastic about understanding 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 programme 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.

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.

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.



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 unlikely to understand the needs of clients and may have difficulties providing your clients with the information required to make buying decisions that satisfactorily address those needs. You may find it challenging or difficult to speak up when you feel a client is using inaccurate or misleading information nor will you evaluate and convert complex or lengthy material into easily understood and succinct concepts for the client. You may provide the clients with requested documentation but are unlikely to proactively provide the most relevant information to meet their needs.

- Within your organisation's products and services, study the technical specifications to better understand the complexities of your offerings and practise converting the information to common terminology for your clients.
- Practise presenting complex ideas as more digestible concepts by recording your presentation. Consider scripting out your talk track in your own words so you can be confident with how you simplify and articulate the information. Play your presentation to someone outside your industry to see if they grasp the main ideas you're trying to convey and seek feedback on how you can improve your presentation.
- Identify a priority client that is attempting to identify which products and services they would like to purchase and proactively send documentation that can provide them with additional knowledge to guide that decision making process. If the documentation is lengthy, point them to the sections that will be most helpful for their decisions.





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.

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?

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 unlikely to enjoy setting or pursuing challenging sales goals. You most likely prefer to work in a calm and slow-paced environment. You are unlikely to identify opportunities without direction or prompting from peers or leadership. You may tire easily from a substantial workload and are likely to avoid competing with your peers to close sales.

- Set a stretch goal each quarter that will impact your business positively. Develop an action plan of how you will achieve the goal, deal with obstacles, and develop metrics to measure success. Share this stretch goal with your manager and discuss progress weekly.
- List out the strengths you believe you bring to your sales role and how each of those motivate you to do your job. Expand on the list by tying meaning to those tasks for you and why you think you and your organisation bring value to your clients.
- For internal team meetings, go outside your comfort zone and research a potential strategic opportunity to present to the team to get their feedback on its potential. Even if the strategic opportunity is not supported, your peers will recognise you bringing potential options for you all to achieve your goals. Try researching these opportunities on a regular basis.
- Set a realistic goal relative to peer performance. Consider challenging yourself to finish in the top 40% for the next quarter.

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 less likely than most to identify and secure new business opportunities. You are likely to be less motivated and energetic in closing your opportunities and may, at times, lack an awareness of the external factors that can impact business-to-business partnerships. You may not know the differentiating aspects of your products and services when compared to your organisation's competitors and are likely to continue to use conventional sales strategies regardless of their efficacy.

- Find a mentor that has been a successful and experienced salesperson. Ask your mentor about successful strategies for finding and securing leads for new business and attempt to implement these strategies in your role.
- Actively attend and participate in your organisation's launch of new products and services. Secure all information on the product and services and study this information to ensure you're very knowledgeable about what your organisation offers and what solutions it provides your clients.
- Participate in any cross-departmental training offered by the Finance department in your organisation. Directly ask questions about how these commercial factors impact professionals in sales roles and ensure that you understand those concepts fully so you can manage both commercial opportunities and risks.
- Consider preparing for a sales conversation that is different to your typical one. Write down the 3 things you will do differently compared to previous interactions.



### Sales Focus

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This is a measure of the attributes related to success in sales jobs. Sales Focus is characterised by: persistence for overcoming obstacles in order to close a sale, desire to pursue aggressive goals and achieve results, and high levels of energy and stamina even after a hard refusal/rejection.

You are more likely than other candidates to prefer challenging tasks. You demonstrate a sense of urgency for getting work done, especially when trying to close a sale. You tend to be a self-starter, and continually set new, more challenging goals for yourself. You usually work more quickly than others; you enjoy a busy schedule, and bounce back quickly after a hard refusal or rejection.

- Try out company products yourself, so you can add personal experience to your sales presentations.
- Get to know your competition. Outline what their products offer and things that you can do to leverage your product.
- When customers are happy with your services, ask for referrals.
- Read books and articles on sales and selling.
- Respond to voicemail and e-mail messages as soon as possible.
- Understand what service issues customers often have with your products by talking to your repair, helpdesk, or support teams.
- Work to stay abreast of new products and services in your field.



This measures the tendency to be comfortable with the constant pressure associated with meeting competitive sales goals. This trait is characterised by: being motivated and excited by sales expectations; showing confidence when negotiating and influencing; and being goal-driven.

You are likely to remain calm and relaxed under high levels of sales pressure. You are not usually anxious, nor do you worry excessively. The stress of workload and work situations is not likely to affect your emotional state or your job performance. Others will view you as completely resilient to stress while others struggle. You usually get what you want when negotiating with or trying to persuade someone and feel energised by the process.

- Consider how unrealistic expectations may cause undue stress for you. Evaluate how often you have set goals for yourself that could not be accomplished and consider what impact this has on your outlook for the future.
- Before entering a challenging sales meeting, prepare for the likelihood that not everyone will appreciate your perspective or agree with your suggestions. Adjust your expectations to prepare for some criticism.
- Take the time to ask customers for feedback, both positive and negative. Actively listen to what they have to say and communicate these findings to the appropriate people in your organisation. Follow up with these people in your organisation to see how the information is being used.
- Maintain your tolerance of others, regardless of the situation. Avoid burning bridges, offending people, and blaming others for outcomes. Remember that in organisations, friends come and go, but enemies accumulate.
- Analyse how you currently show confidence and self-assurance. What behaviours do you use? In which circumstances are you likely to show the most confidence? What would you like to improve in other areas where less confidence is evident?
- Model versatility for those around you. Begin with low-risk situations, where only subtle changes are required. Let trusted colleagues know that you are evaluating a more adaptive approach. Ask for their reactions and comments.
- Analyse the general level of versatility in your sales team. Observe how people react to new goals and stressful situations. Consider how you might help others to feel more prepared to handle difficult goals and clients.
- When you see others lacking confidence or resilience during negotiations, offer to mentor them. Help them to channel their stress and anxiety into more positive outcomes during negotiations.