
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 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

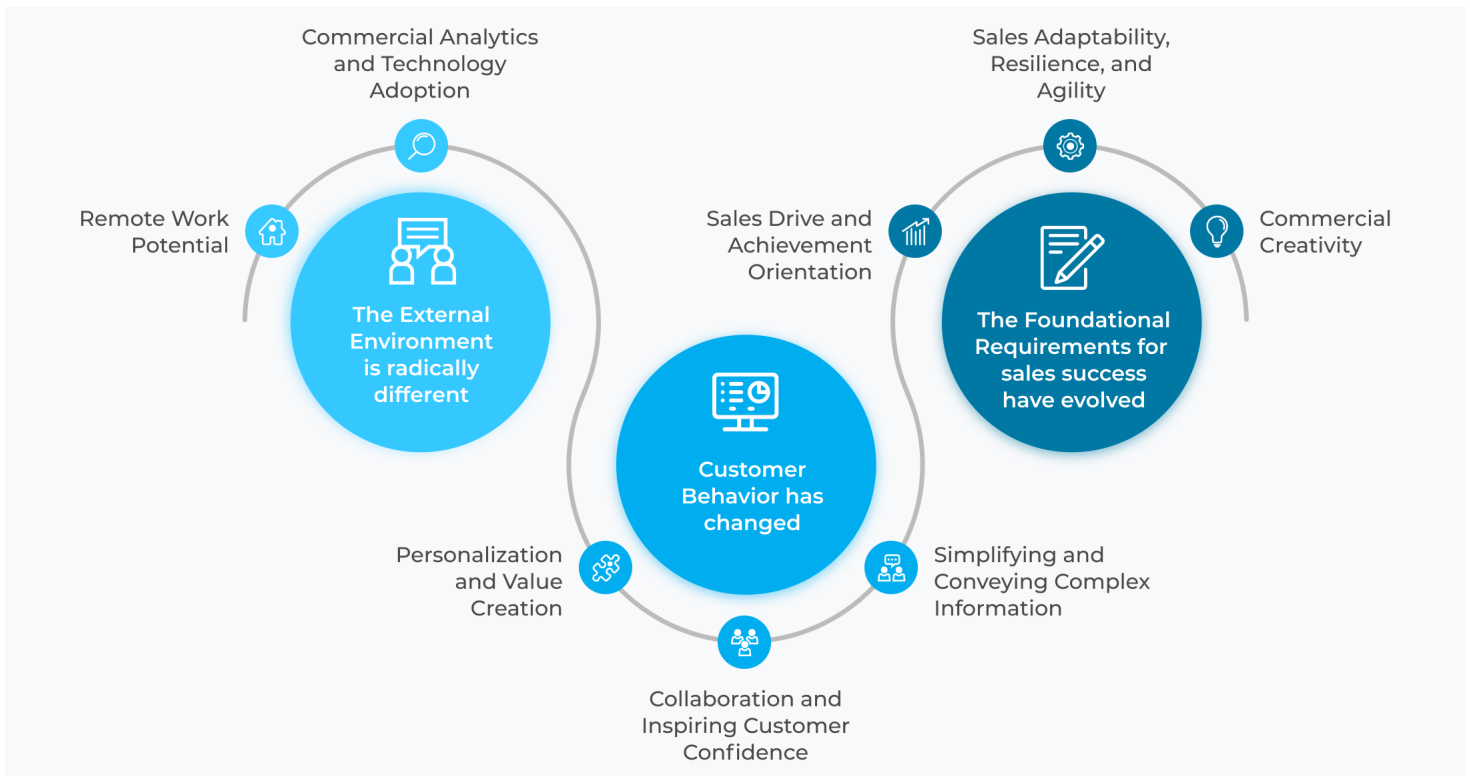
In this rapidly changing environment, it is unsurprising that the competency building blocks required to be a top sales performer are also changing. SHL assessed more than 11,000 B2B sales professionals, with two key findings:

- 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.

2. 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.



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 somewhat uncomfortable with using technical tools to achieve commercial objectives. You are likely to delay or avoid learning new software systems (e.g., Customer Relationship Management) that can assist you in sales roles. You are likely to prefer traditional methods for completing work that are not reliant on digital advancements and changes in the sales workplace and you may feel awkward communicating through technological systems. You are likely to rely on instinct or feelings to help fulfill your sales goals rather than critically evaluating information with commercial data analytics, facts/figures, and research.

- Identify peers that have been successful in utilizing data to reach their revenue goals. Work with them to understand what data analytics are useful to their clients and how to perform those operations yourself.
- Identify areas where you can improve your technological systems and data analytics skills and enroll in a free online course related to your largest need to further your education and upskill in those programs.
- When working with a new client with whom you would typically utilize traditional methods, develop an alternative plan that is an unconventional and innovative approach in securing their business.
- Set up a meeting with your manager to discuss training opportunities with technological systems and the utilization of data.

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 perform as well as others in a remote sales role. You are likely to remain energetic and focused on closing sales in a virtual setting. You are likely to comply with organizational policies surrounding remote work practices. At times, you may be slightly less organized or systematic than when you are working in an office. You are likely comfortable with the autonomy of a virtual setting and persist with difficult tasks regardless of the effort required.

- Create a plan of how you will spend your time for one week and monitor your time to see how you planned versus what you actually completed. Identify any discrepancies to assist in better planning for upcoming weeks.
- Develop a list of common distractions in your home office and attempt to limit attention to those items by only allowing focus on those non-work items during your established break times.
- Establish a routine that allows you to begin and end work at times that allow for optimum opportunities for correspondence between you and your clients.
- Begin each day of work by prioritizing tasks that will have the largest impact on the attainment of your goals.

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.



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 be likely to direct 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.



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 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 likely 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 organization 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, summarize 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 organization 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 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 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 likely appreciate stability in your sales role, but are also likely to appreciate variety and introduce new tasks and goals at times. You are likely 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 utilized to manage these situations successfully and create a list to help you manage future tasks when you're feeling stressed.
- When introduced 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 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 to be comfortable in 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 to be 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 to be 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.

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.