

Competency Development Toolkit

Consultant Benchmark



Signature Profile

Benchmark Profile Description

The Consultant role refers to high-level experts who are responsible for collaborating with sales teams to develop strategies that improve business outcomes for customers. Often referred to as trusted advisors or business architects, they understand their customer's business, strategies, and key initiatives and focus on delivering the business value of their solutions. They win the trust of their clients and confidence in their solutions by demonstrating expert-level product and industry knowledge.

Predictive Competencies

- Identifies and Addresses Customer Needs
- Commits to Continued Professional Development
- Maintains and Shares Market Trend Awareness
- Makes Persuasive Presentations
- Engages Others in Learning to Maximize Benefit from Purchase
- Develops Solid Relationships by Making Client Needs a Priority
- Adapts Sales Approach to Match Buyer Motivations

Identifies and Addresses Customer Needs

Seeks to provide an appropriate solution by understanding what the customer is trying to accomplish; spends time in a needs analysis process that identifies key objectives specific to an individual customer; gives the customer’s agenda priority over a standard response; changes the sales approach or solution to accommodate the customer versus force fitting the customer to an existing model

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> ▪ Lacks a thorough approach to a customer needs analysis, preferring to move immediately to an existing solution ▪ Can be distracted from learning customer requirements by the personalities or politics of a situation ▪ Tries to fit the customer’s methods or goals into a standard model or solution ▪ Takes it as personal criticism when suggestions are challenged ▪ Can be too invested in own agenda to comfortably yield to the customer’s agenda 	<ul style="list-style-type: none"> ▪ Asks questions and studies the customer’s key priorities ▪ Incorporates the customer’s responses and input into a business plan tailored to fit that customer’s needs ▪ Takes the time to explore options or alternatives for helping the customer to achieve key objectives ▪ Accepts the rejection or modification of suggestions in an effort to best understand and help the customer

Mindset Tips:

- Do not allow your feelings for customers to distract you from analyzing their needs.
- Remain objective – do not allow rejection of your ideas due to office politics, to decrease the amount of time you take in uncovering the customer’s needs.
- Create an agenda for each meeting, making sure that you ask enough questions to ensure that you understand the customer’s goals and that your business plan will produce the desired results.
- Look for ways in which you can integrate your products and services to reach customer goals on a case-by-case basis.
- Be flexible in implementing your standard “sales process” and meet customers where they are – don’t stick to your standard process when it’s not working.
- Be willing to change and customize solutions to meet each customers’ unique situation.
- Find out how your organization has customized products and services for other customers and be able to share those examples with customers for whom a standard solution will not work.

Success Tactics:

- Ask questions to uncover the results each customer is looking for and explore and plan how your products and services will help them achieve those results.
- Analyze your presentations to see if they are too bland or overly detailed – modify them to generate more excitement.
- Keep accurate documentation of each customer’s unique needs, expectations, and business strategies and check often to ensure that your plan fits the bill.
- Ask your customers to describe the key points of their ideal solution and tie the features and benefits of your solutions to their stated points.
- When a standard solution will not meet their needs, be sure to offer alternatives along with the pros and cons of each solution.
- Take the time to learn what is important to your customers – study their key priorities so that you can devise an appropriate business plan.

Commits to Continued Professional Development

Sets job as a top priority and devotes extra hours to skill development; accomplishes objectives dictated by their present position while investing additional time and effort to increase their competence and improve professional standing

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> ▪ Accepts moderate standards for career goals so that time requirements for accomplishing those goals are not excessive ▪ External demands on time can limit the attention and resources dedicated to career advancement ▪ Prefers to spend all after-work hours in family or social activities rather than designate time for career planning and skill development 	<ul style="list-style-type: none"> ▪ Define themselves, to a great extent, by their work and derive personal satisfaction from career success and accomplishments ▪ Dedicated to improving professional standing, even at some personal sacrifice ▪ Commits time and resources to career advancement by preparing to deal with a wider scope of challenges, even within current position ▪ Dedicates some after-hours time to laying the groundwork for developmental activities ▪ Continually works to develop the skills and abilities that will support a career progression while devoting the time and resources to be effective in present responsibilities

Mindset Tips:

- Create a list of your long-term career objectives – putting them in writing will help you to remain focused.
- Analyze your goals in terms of the time and effort needed to reach them – ensure that you’re not settling for average results simply because they’re easier to achieve.
- Examine your level of commitment to career advancement – find what inspires you and use that to motivate you toward higher goals.
- Challenge yourself to meet incrementally higher goals – raising standards gradually will make it easier to meet objectives that require more effort.
- Determine what techniques motivated you in the past and use them to bolster your personal career standing.
- Remember that some personal sacrifice may be required in achieving job success – nothing worthwhile is easy.
- Discover ways to manage your time so that the extra hours spent developing your career will not feel like an imposition.
- See if your work routine can be streamlined, thus freeing more time for career development.

Success Tactics:

- Find a co-worker or superior who can act as a mentor – sometimes having someone who is interested in your goals is sufficient motivation to try harder to reach them.
- Commit to finding balance in your after-work hours – set certain times aside for family and friends and dedicate the rest to career and skill development.
- Take a course in time management so that you can spend time with friends and family, and still expand your skills and remain effective in your current position. Attend morning or evening classes, selecting the time of day that works best for your schedule.
- Set firm learning goals and commit to doing whatever is necessary to reach those objectives within a specific period of time.
- Speak with colleagues who successfully juggle skill improvement with personal obligations – ask them for pointers.
- Expand your skills by reading related materials or meeting with experts who are willing to act as mentors.

Maintains and Shares Market Trend Awareness

Stays in touch with market trends, including environmental and competitive forces influencing the market, so that they are seen as a valuable resource to important constituents internal or external to the organization; constantly seeks information that will be useful but is not readily available to colleagues; enjoys being sought for advice and instruction; spends the time to build a base of knowledge that ultimately helps others to be more effective

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> ▪ May believe they can get by on a cursory understanding of market trends and conditions because its added value to others isn't appreciated ▪ Comfortable with present knowledge of the market and may believe the incremental gains that could be achieved by developing knowledge base would not justify the time spent ▪ Does not increase understanding of market issues for the purpose of sharing that information with others ▪ Assumes customers will utilize their own resources to stay on top of changing market conditions 	<ul style="list-style-type: none"> ▪ Takes professional pride in maintaining an in-depth awareness of market issues ▪ Believes there is a benefit to continually building and adding to own knowledge base in market and competitive issues ▪ Wants to be prepared to serve as a source of advice and information to customers ▪ Updates own market information in order to be of assistance to customers who may not have the time or resources to research changing market trends themselves

Mindset Tips:

- Understand that gaining information so that you can become a trusted and loyal advisor could be the key that differentiates you from your competitors.
- Create an internal networking group to share ideas, trends, and other information – doing so will share the burden of information collecting and give everyone a chance to broaden their knowledge base.
- Go to school on the competition – yours and your customers' – to be prepared to competitively position your organization and that of your constituents.
- Remember that providing both external and internal customers with useful, up-to-date information can help to position you as a valuable resource.

Success Tactics:

- Arrange your work schedule so that you have a designated time each day to review industry publications – discuss your findings with colleagues so that you can gain different perspectives on the information.
- Ask your colleagues or members of your network to share their best data sources and reciprocate with them so that you can all share on expert and, possibly inside, industry information.
- Brainstorm and write down several questions that might be on the minds of your constituents; use these questions to focus your research to relevant topics.
- Use networking events to interview contacts across industries on trends, challenges, and opportunities – use this knowledge to advise internal and external customers.
- Attend general business and industry conferences to learn about the latest thinking in your industry and beyond so that you can gain knowledge that may not be readily available to your constituents.
- Share relevant information you collect with both internal and external customers and provide analysis of how these trends and events impact them and their business as well as facts to back up your claims and bolster your credibility as an accurate resource.
- Subscribe to on-line publications or data services, such as the Wall Street Journal or Hoovers; these services allow you to quickly gather and analyze data, so that you can pass it along to customers while it is still timely and relevant.

Makes Persuasive Presentations

Excites the customer with an enthusiastic presentation style; demonstrates value and actively promotes products and services by making an emotional appeal; holds the customer’s attention and interest by keeping the presentation content relevant; varies style to build toward a buying decision

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> ▪ May be more comfortable with establishing a dialogue that emphasizes listening and an exchange of ideas than with making an impact on the audience ▪ Uses presentations to entertain rather than inform or persuade ▪ Sticks too closely to a script and does not vary the content or emphasis to address the needs of each audience ▪ Too focused on the mechanics of the presentation itself to pay attention to audience understanding and concurrence ▪ Cannot easily adjust to a nonsupportive audience response and may rush an ineffective presentation just to finish it rather than alter the presentation to change that response 	<ul style="list-style-type: none"> ▪ Makes formal presentations that focus on creating an impact while communicating information ▪ Has the potential to capture and hold the audience's attention ▪ Takes charge and keeps control of the information being communicated through a presentation that is polished and rehearsed ▪ Varies style and content to appeal to the audience ▪ Projects enthusiasm about a solution to the audience, moving them closer to a buying decision ▪ Monitors audience response and adjusts presentation to stay on target

Mindset Tips:

- Commit to becoming fully informed about your product, so that you can answer questions and easily highlight exciting features.
- Get to know your customer so that you can focus your presentation on those benefits that they will find most interesting.
- Do not focus so much on conveying information that you lose sight of style – be informative but strive to be entertaining.
- Strive to focus less on your words and more on audience reaction – if you note boredom, make a mental note of what you were saying at the time.

Success Tactics:

- Analyze your presentations to see if they are too bland or overly detailed – modify them to generate more excitement.
- Record your presentations and then watch them so that you can see, first-hand, where you lose audience attention.
- Attend presentations by charismatic colleagues – take note of the techniques they use to generate excitement and implement them in your own presentations.
- Ask an experienced co-worker to listen to your presentations – ask them for pointers on how to add excitement to the content.
- Write your presentation on paper before performing it – highlight all the verbs you use and try to replace them with words that denote more dynamic action.
- Attend a formal public speaking class that can ease your fears and hone your performance skills.
- Practice your presentations until you’re comfortable enough to perform them in a more casual, conversational style.
- Speak as often as you can in non-work-related areas so that you can gain the confidence you need.
- List all the questions asked during your presentation – repeat questions may need to be worked into the presentation itself.
- Analyze your audience and modify your presentation to suit their personality – for example, if they are more technically oriented, focus on the technical aspects of your product.
- Work with different groups to learn how to analyze audience reaction and how to alter your message to reach them.

Engages Others in Learning to Maximize Benefit from Purchase

Helps the customer to gain maximum benefit from the product or service by committing to continuous education that provides information updates or product training; prepares more structured sessions to cover the most critical areas of learning; stays on top of information needed by customers in an effort to serve as a resource; takes responsibility for motivating customers to update their information; reinforces shared information through periodic repetition; routinely adjusts education process to address individual and group progress or understanding

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> ▪ Prefers one-on-one training or a more loosely organized curriculum to the structured requirements of a scheduled class session ▪ Expects the people being trained to be self-motivated to learn and becomes impatient when required to repeat or reinforce already covered information ▪ Does not implement a tracking process for assessing the effectiveness of teaching efforts or the progress of trainees ▪ Enjoys working on content delivery and may be more concerned with the audience’s assessment of own public speaking skills than with the subject matter ▪ Tries to make the training entertaining at the expense of providing only relevant information 	<ul style="list-style-type: none"> ▪ Prepares scheduled and consistent programs to train or educate others ▪ Establishes measurable criteria for assessing progress in the learning process ▪ Demonstrates patience and a willingness to repeat or reinforce ideas and information until the audience understands ▪ Focuses training sessions on those competencies that will make a difference in the group’s ultimate effectiveness ▪ Concentrates more on the results produced or change accomplished through training than with how attractive or entertaining the training can be

Mindset Tips:

- Remember the importance of providing your audience with a formal training program that establishes key concepts and introduces new ideas and developments.
- Resolve to, not just educate your audience, but also to help them to maximize their performance.
- Accept the responsibility of remaining up-to-date so that you can be a constant resource to others.
- Commit to revising your training presentation every month so that new developments can be incorporated.
- Understand that the most effective training presentations are those that strive to make a difference by relating relevant information.
- Realize that by remaining up-to-date and passing along new information to your audience, you position yourself as a valuable resource.
- Understand the need to prepare a formal training program in order to ensure that you sufficiently cover critical areas of learning.
- Realize that your role is to reinforce basic concepts, but it is also to impart up-to-date information – if your presentation is not relevant to the group’s current work environment, then it is not very valuable.
- Commit to increasing your group’s competency and productivity – take responsibility for ensuring that they understand all key information, including basic concepts as well as new developments.

Success Tactics:

- Choose a few key issues or goals for improvement and focus your presentation on those subjects.
- Combine “the basics” with more complex concepts to ensure learners are continuously upgrading their skills and knowledge.
- Review your presentations with a colleague or superior – ensure that you provide key concepts as well as new information.
- Create a lasting impression on your audience by giving a presentation that will make an impact on the audience’s ability to perform.
- Devise a lesson plan – trying to teach in an informal manner could lead to you simply scratching the surface of important topics.
- Remember that your goal is to improve your audience’s skill level, not just to have your presentation enjoyed – make sure that you are adequately covering critical issues and not wasting time with superfluous information.

- Do not try to dazzle your audience with irrelevant information or a slick presentation style – your job is to make learning easy and fun, but do not sacrifice substance for style.
- Limit your programs to those skills that are key to your group’s success – make a list of the key concepts you will cover and use it as a visual prompt in case you start to wander into other subjects.
- Make the improvement of your audience’s skills, methods, and techniques your primary goal – do not seek to merely entertain.
- Build tracking systems into your program so that you can gauge whether or not you are effectively communicating your message.
- Create training plans and then review them to ensure that you cover both old and new issues and that you spend an adequate amount of time on each.
- Review coaching plans regularly – clarify and reinforce ideas that groups had trouble understanding and add new developments in critical areas so that your audience can be up-to-date.
- Sit in on the presentations of an effective trainer – take notes and try to utilize those techniques in your own presentations.
- Stick to those issues that will have the greatest impact on overall results – do not try to incorporate every related piece of knowledge or you could overwhelm your audience.
- Take responsibility for helping your audience learn – if someone asks you to repeat information, do not become impatient – this is a sign that you did not adequately reinforce the concept to begin with.
- Use the feedback of the audience to strengthen the quality of your presentation.
- Work with a colleague who has exceptional training skills – review your presentation with this person to see where your program can be streamlined and where more substance needs to be added.

Develops Solid Relationships by Making Client Needs a Priority

Demonstrates appropriate knowledge of company clients and their needs and requirements; is continuously alert and responsive to changing customer needs, and formulates business strategies designed to enhance customer satisfaction, build relationships and product/service loyalty, and ensure competitive advantage in the marketplace; sees customer satisfaction as a predominant theme in business functional planning and execution

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> ▪ Treats customer relationships in a functional manner that limits the opportunity to develop an intimate knowledge of how customers operate ▪ Focuses more on the administrative aspects of the job than on adapting business strategies to accommodate individual customer needs ▪ Builds relationships with those customers who are easily satisfied ▪ Has difficulty giving top priority to customer satisfaction when frustrated or concerned about own issues 	<ul style="list-style-type: none"> ▪ Builds a thorough knowledge of customers, from how they do business to what is required to remain competitive in the marketplace ▪ Recognizes that customer needs are constantly changing and adjusts business plans and their implementation to address those needs ▪ Develops a solid relationship by making customer needs a priority ▪ Works to create customer satisfaction by gearing business strategies toward making customers more effective in their operations

Mindset Tips:

- Strive to thoroughly understand your customers' job requirements and stay alert to any changes; you may not see the changes as important, but they could alter your customer's outlook.
- Commit to contacting your customers on a regular basis so that you can learn all you can about their businesses and ever-changing needs.
- Treat customers as allies; build a personal relationship with them so that you can develop an intimate knowledge of how their business operates.
- Work to understand your customers' business needs so that you can help them work more efficiently; when you think you understand, find another facet that you may have overlooked.
- Place a high priority on building strong customer relationships by demonstrating that you are interested in their success.
- Understand that the more support and service you provide to customers the stronger the relationship you'll form with your customers; it's a win for your customer because of a greater bond, and a win for you in increased customer loyalty and business.
- Challenge yourself to view each customer, no matter how difficult they might be, as unique and valuable and work to meet their individual needs.

Success Tactics:

- Actively seek as much information as possible about your clients' businesses so that you can adjust your plans to meet their changing needs.
- Maintain a schedule of regular customer visits so that you can learn, firsthand, about the problems and challenges faced by their business.
- Develop a full understanding of your customers' operations so that you can identify market trends that could alter their needs.
- Work with a top salesperson in your company and implement their customer relationship-building techniques into your daily routine; trying a new method may improve your results.
- Delegate some of your administrative duties so that you have more time to focus on developing relationships with your customers; discuss any scheduling issues with your supervisor.
- Compose a list of questions that will start conversations and aid you in unearthing information about your customers' businesses.

Adapts Sales Approach to Match Buyer Motivations

Gathers essential information to determine the benefits others need in order to be sold; willing to adjust approach to fit different buyer motivations; influences or persuades others by determining how the other individual can benefit, and then communicates those advantages

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> ▪ May not be committed to researching what benefits the prospect needs in order to be sold ▪ Might not recognize that prospects have different buying motivations and may sell the same way to all people 	<ul style="list-style-type: none"> ▪ Will work to acquire the information needed to determine what benefits will motivate prospects to make a buying decision ▪ Able to use knowledge gleaned about prospect needs to vary sales approach according to different buyer motivations

Mindset Tips:

- Treat prospects as individuals and seek to understand their unique needs, expectations, and motivations – work to determine what is important to each customer and then appeal to that hot button.
- Don't make assumptions about a new prospect based on past experiences – treat each situation and prospect as a blank slate.
- Remember that the best salespeople work to understand the other party's point of view and then position the benefits in a customer-oriented way in order to achieve buy-in.
- Seek to understand each prospect's unique decision-making and buying criteria and ensure you appeal to those needs in your sales approach – for example, if the customer is concerned with being on the cutting edge of technology, be sure to appeal to that motivator in your routine.

Success Tactics:

- Develop a formal process for understanding the customer's viewpoint and then select the most appropriate sales approach.
- Work with a colleague who accurately assesses customer motivations – take note of the methods this person uses to determine what sales approach will gain buy-in.
- Prepare and ask a variety of open-ended questions to elicit as much information as possible from prospects about their needs, expectations, and key priorities so that you can vary your sales approach accordingly.
- Analyze your past few sales calls – check to see if you successfully vary your sales approach to suit the prospect or if you're taking a one-size-fits-all approach. Make the necessary changes.
- Role-play with a colleague or superior so you can practice uncovering specific motivators and then varying your sales approach to appeal to the other party's point-of-view.



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