

## Competency Development Toolkit

Inbound Inside Sales Benchmark



*Signature Profile*

## Benchmark Profile Description

The Inbound Inside Sales role responds to contact initiated by customers over the phone or via electronic communication. Sellers in these roles are tasked with gaining an understanding of the caller's needs or requirements and quickly identifying the appropriate actions to move the opportunity towards a sale, meeting, or other relevant outcome. In some cases, they may be responsible for taking orders and maximizing sales of products by up-selling and cross-selling and may have a quota.

## Predictive Competencies

- Tailors Style to Fit Customer Expectations
- Analyzes and Resolves Customer Problems
- Identifies and Addresses Customer Needs
- Achieves Results by Prioritizing Customer Satisfaction
- Makes Profitable and Pragmatic Recommendations

## Tailors Style to Fit Customer Expectations

Tailors image to fit customer expectations; adapts to different situations with sincerity and realism, taking care to avoid obvious role-playing or acting; recognizes the value of first impressions; studies the image or style with which customers are most comfortable and adopts the conversational style and language most trusted by them

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> <li>▪ May blatantly promote company or self without anticipating how the customer will respond</li> <li>▪ Fails to do the homework on a prospect or customer that would identify or verify the image that would be consistent with customer expectations</li> <li>▪ By focusing so intently on own style and objectives, fails to make it a priority to establish and reinforce credibility with the customer</li> <li>▪ May ignore or fail to be concerned with the image projected to others</li> <li>▪ May be inflexible about changing personal style to accommodate a customer who would be more comfortable with or impressed by something different</li> </ul>	<ul style="list-style-type: none"> <li>▪ Exhibits interest and commitment through involvement in industry activities</li> <li>▪ Quietly promotes self and company in a manner that is respected by and gains credibility with the customer</li> <li>▪ Before the first impression is made, becomes familiar with customers, their business, and how success has been achieved with similar customers in the past</li> <li>▪ Recognizes the business etiquette (such as dress and speech) appropriate to a situation</li> <li>▪ Has the ability to read people and react to individual needs</li> <li>▪ Assumes the appropriate professional level to match the customer</li> <li>▪ Adjusts own communication style to ensure that the message is heard and to encourage dialogue</li> </ul>

### Mindset Tips:

- Remember that first impressions are critical, therefore arm yourself with knowledge that will help you to build credibility and prove to the customer that you can meet their expectations.
- Understand that as different customers have different expectations, it is impossible to work from a script – having an agenda for the meeting is fine but personalize it by providing materials that will have the best impression on the customer.
- Realize that knowledge is power – researching your customers before visiting them will provide you with the information you need to appeal to your customers' personal preferences.
- You never get a second chance to make a first impression – therefore it only makes sense to study customers carefully in order to ascertain what they expect from your meeting and then provide it.

### Success Tactics:

- Use the internet or any public domain sources to research the background of the company and gain insight into their corporate image – whether it be a company of MBA's, technical experts, or innovators.
- Before meeting with customers, work to understand their expectations – gather testimonials and other materials that will make the best impression.
- Read the Annual Report of the company before the first visit, as it contains valuable information about the company's mission, vision, strategic priorities, and values.
- Build a portfolio of materials that will demonstrate how you have helped companies similar to the customer's to succeed.
- Be prepared with the requisite support material, data, examples and customer stories you think will most establish trust and credibility with the customer.
- Understand the unwritten personality of the company – education level, style of dress, company jargon – and attempt to mirror that style in each interaction.
- Use speaking patterns, gestures, and vocabulary that are compatible with those in the customer organization.
- Role-play with a colleague or superior so that you can practice modifying your approach for different customers.

## Analyzes and Resolves Customer Problems

Objectively analyzes a problem situation and takes steps to provide a solution; identifies the root of the problem before pressing for a resolution; remains engaged until a solution is reached; tries to see all sides of the problem and thus understand others' assessment of the issue or response; takes personal responsibility for identifying a resolution

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> <li>▪ Can be biased and make judgmental or inappropriate assumptions without analyzing the situation objectively</li> <li>▪ May press toward resolution without identifying the root of the problem</li> <li>▪ Becomes wrapped up in own views and loses sight of how others may see the problem or response</li> <li>▪ Becomes frustrated with solving the same or similar problems over and over again</li> <li>▪ Tends to take complaints and problems personally and feel oppressed by them</li> <li>▪ Sees problem resolution as an inconvenience and a distraction</li> <li>▪ May oversimplify a problem and its solution and disengage efforts before identifying a satisfactory solution</li> <li>▪ Resists taking ownership of the solution</li> </ul>	<ul style="list-style-type: none"> <li>▪ Objectively isolates and defines problem areas clearly</li> <li>▪ Determines the true nature of the problem rather than deal with its symptoms</li> <li>▪ Willing to 'think outside the box' to find a solution</li> <li>▪ Displays sensitivity and genuine interest in understanding others' perspectives and will not ignore their concerns</li> <li>▪ Regards any problem as a challenge to be met with eagerness and enthusiasm</li> <li>▪ Remains engaged until a problem has been resolved</li> <li>▪ Takes personal accountability for the result</li> </ul>

### Mindset Tips:

- Remain objective in the face of problems – do not take them personally, but view them as challenges to be overcome.
- Remain calm in the face of a serious issue or problem; staying objective will help you find a higher quality solution and will make your customer and/or team members more confident in the solution.
- Do not become frustrated by repetitive problems – every business is going to experience its share of recurring issues (i.e., a webmaster confronted with users who have forgotten their password), so learn to take complaints in stride.
- Commit to solving the problem at the root – a quick fix may be convenient for the time being, but will just allow the problem to resurface at a later time.
- Remember that solving problems is not a distraction from your duties, it is part of your job description.
- Learn that, although you may not be able to devise a solution, management and colleagues are always available for advice so there is no reason to leave a situation unresolved.

### Success Tactics:

- Gather as much information as possible before you suggest a remedy – be sure you fully understand the situation before you act.
- Work with a colleague who effectively solves problems – take note of the techniques this person uses to identify the problem and then work toward resolution.
- Find a coach or mentor who can work through customer complaints with you and advise you as to how you can improve your performance.
- Practice problem-solving by having a colleague role-play with you – ask them to pose difficult complaints so that you can gain confidence in identifying the root of the problem and then resolving it.
- Take the time to come to a high-quality solution – the first solution you come to might not always be the best one.
- If you must pass a problem on to someone with more expertise, devise a monitoring system so that you can be certain that the issue was effectively resolved and the customer is sufficiently satisfied.
- Follow up with all involved parties to ensure the solution is working to their satisfaction.

## 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 fit the customer to an existing model

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

### 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.

## Achieves Results by Prioritizing Customer Satisfaction

Prioritizes customer satisfaction as a major objective in order to succeed in a sales role; works to establish rapport and concentrates on building a trusting relationship with customers; demonstrates this commitment with a hardworking approach and a sense of urgency in the face of problems

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> <li>▪ May put forth a diminishing effort over an extended period of time, particularly if it is difficult to please a customer</li> <li>▪ Focuses on those customers who are less demanding or where there is a long-standing relationship</li> <li>▪ Tends to 'let sleeping dogs lie' and is reticent to search for problems that may be in the early stage of development</li> <li>▪ Wants to impress customers with what can be accomplished for them, turning their attention from being pleased with the solution to being pleased with the efforts</li> </ul>	<ul style="list-style-type: none"> <li>▪ Understands that success depends upon a willingness and ability to provide a genuine benefit to customers</li> <li>▪ Sets high expectations for the level of customer satisfaction provided and is unwilling to settle for anything less</li> <li>▪ Dismisses the length or strength of the customer relationship as a factor in making the effort to ensure customer satisfaction</li> <li>▪ Steers customer conversations and interactions to be sure to get the information needed to produce the desired results</li> <li>▪ Concentrates on effectively executing the basics of customer care rather than the appearance or impression that is created in the process; unconcerned with impressing others</li> </ul>

### Mindset Tips:

- Understand that your success depends on customer satisfaction - place the customer in the center of the sales process and all your daily activities.
- Do not allow your personal feelings for a customer to influence the level of service you provide them – realize that your success hinges upon providing for all of your customers' needs, not just a select few.
- Commit to exerting a consistent effort in meeting customer needs – do not allow your level of service to diminish in the face of difficult customers or when the novelty of a new customer has worn off.
- Remember that difficult customers tend to be difficult because they are dissatisfied with the level of service they have received – work to make all your clients happy, no matter their attitude.
- Learn that your job is to provide customer satisfaction and not to boost your own image with showy solutions of little benefit to the customer.

### Success Tactics:

- Demonstrate an understanding of what constitutes value for each customer – work to provide a genuine benefit that will satisfy the customer and ensure your success.
- Work on building a trusting relationship with customers by consistently and objectively providing for their needs – doing so will give you a good reputation that will lead to sales success.
- Show your ability and willingness to help resolve service problems quickly and completely by following up with customers to detect concerns before they become problems.
- Steer customer interactions to be sure you acquire the information you need to provide a high level of service.
- Make customers feel as if they are the center of interactions by prodding them to discuss their needs.
- Act on ideas and suggestions from customers to spark ideas for continuous product improvements or enhancements – let customers know that you are listening to them and are taking their requests seriously.

## Makes Profitable and Pragmatic Recommendations

Proactively weighs decisions, recommendations, and actions against their impact on the bottom-line; looks for options that accomplish what needs to be done without compromising profitability; understands the economics of the processes of their own organization and those of customers; leverages knowledge of the business and the customer to provide recommendations that are efficient and practical

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> <li>▪ Cannot effectively formulate a more profitable approach when historically, things have always been done a certain way</li> <li>▪ Does not anticipate potential threats to profitability or identify alternatives to circumvent those threats</li> <li>▪ Focuses on an isolated piece of the solution without understanding and evaluating its overall economic impact</li> <li>▪ May judge the quality of a recommendation or solution by its 'sizzle' or pizzazz than by its impact on the bottom-line</li> </ul>	<ul style="list-style-type: none"> <li>▪ Makes a proactive effort to choose the most profitable options and will not be surprised by budgets that run over or profits that don't materialize</li> <li>▪ Evaluates own actions and decisions against the need to contribute to the organization's profitability</li> <li>▪ Manages resources wisely, and makes decisions that enhance the organization's financial position</li> <li>▪ Values practicality in getting the job done and will not add unnecessary frills or extras that could compromise the bottom-line</li> <li>▪ Keeps an eye on profitability when solving a problem or implementing a plan</li> <li>▪ Sufficiently involved in all areas of the business to know key performance criteria</li> <li>▪ Uses own knowledge of the business and the market to weigh options so the desired results can be accomplished most profitably</li> <li>▪ Knowledgeable of methodologies to control assets and ensures they are applied</li> </ul>

### Mindset Tips:

- Don't sacrifice profits to win the business; make sure all the deals you put together balance your organization's profitability with that of the customer.
- Commit to weighing options before implementing them – list the pros and cons of each solution and then choose the profitable one.

### Success Tactics:

- Do a walk-through of your customer's facility so that you can see, firsthand, the processes involved in operation and determine how overall profitability can be improved.
- Familiarize yourself with all the key performance criteria of your customer's organization – do not focus on just one aspect of the business, but keep an eye on the big picture.
- Understand how your customer operates and provide advice on how to use your company's products and services to either save money or increase revenue.
- Develop processes and methodologies to monitor your customer's business as well as overall business trends, so that you can make recommendations that will increase profitability.
- Develop a list of questions that will assist you in locating the primary source of your customer's revenue and enable you to give valuable financial advice.
- Work to understand all the areas of the business so that you do not make recommendations that improve profitability in one area, while increasing expenses in another.
- Do not focus on solutions that are flashy but have little financial value or are impractical to implement – commit to only those solutions that are profitable, practical, and realistic.
- Analyze solutions before committing to a course of action – anticipate what could go wrong with each solution so that you will be better prepared to work around those obstacles later.
- Review each part of a process, including established procedures, to see where efficiency and profitability can be improved – procedures often become outdated, so do not be afraid to change them.
- Create a system for weighing options by their impact on the bottom line – do not opt for solutions simply because they are convenient or they look impressive, but select those that will have the most positive impact.



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