

# Competency Development Toolkit

Indirect Sales Benchmark



*Signature Profile*

## Benchmark Profile Description

The Indirect Sales role is responsible for supporting a network of distributors, agents, value added resellers, or manufacturer's representatives. They have little direct authority over these sales forces except in rare cases where they are under contract to sell only their products or services. As a result, they are tasked with training and motivating distribution partners through joint calls, promotions, and/or special bonuses.

## Predictive Competencies

- Ensures Coverage and Responds to Customers
- Expands Business Through Cross Selling
- Prepares and Delivers Effective Presentations
- Closes Through Personal Identification with the Product
- Engages Others in Learning and Assesses Understanding
- Coaches Others and Provides Timely Feedback
- Leverages Expertise to be Recognized as Subject Matter Expert

## Ensures Coverage and Responds to Customers

Organizes time to cover ongoing priorities and will make arrangements to cover whenever absence is unavoidable; understands that rewards are commensurate with effort and invests the time to get the job done; uses time efficiently during regularly scheduled hours so that extra hours are not inevitable, but is responsive to additional requirements or demands when necessary

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> <li>▪ Believes personal time is off-limits and may resist interrupting leisure activities to deal with work demands</li> <li>▪ Loses control of their action list and can become overwhelmed by ongoing priorities</li> <li>▪ May not feel a need to put forth more effort, but will accept delays instead</li> <li>▪ Allows outside distractions, commitments or time demands to consistently take priority and prevent an efficient use of time and resources</li> <li>▪ Fails to put into place systems or resources to cover account needs if they are unprepared or unavailable, creating delays in response time</li> </ul>	<ul style="list-style-type: none"> <li>▪ Available after hours to respond to the needs of both internal and external customers</li> <li>▪ Organized and efficient in how time is spent during the day so that the need to work unscheduled hours is the exception rather than the rule</li> <li>▪ Resists the distraction of nonwork-related issues that can interfere with the coverage of ongoing priorities</li> <li>▪ Accepts that a strong sense of duty to those who are counting on them cannot always be met during regular working hours</li> <li>▪ Prepares a back-up system to cover unpredictable or unpreventable overloads in any absence</li> </ul>

### Mindset Tips:

- Remember that since your workload will vary, there will be times when working extra hours will be unavoidable.
- Understand that continually making optimum use of your work hours will reduce the amount of personal time lost to workload demands.
- Realize the importance of having a back-up plan – you will not always be available after hours and must have a system in place to handle issues in your stead.
- Even though you may be available after hours, there will be times when multiple problems arise – make certain that you prepare someone to assist you

### Success Tactics:

- Commit to organizing your time so that the number of extra hours you need to work are reduced.
- Maintain a To Do list to keep track of tasks and prevent you from feeling overwhelmed.
- Pair up with a colleague who effectively organizes his workload – take note of techniques you can use in your own schedule.
- Check libraries and bookstores for reading material that deals with the subjects of organization and time management.
- Devise a system by which you can monitor internal and external customers and anticipate potential issues before they become problems that require your personal time.
- Analyze your work process and evaluate where you may be wasting time - modify your work habits so that you maximize work hours and minimize after-hour demands.
- Identify those who are responsible for handling issues in your absence – ensure that they know they are to be held accountable.
- Compose a public file for each internal and external customer so that others can come up to speed should you be unavailable.
- Prepare someone to take over when you are unavailable – fill that person in on all details pertinent to each customer.
- Create a list of people in your department who would be able to answer particular questions and solve customer problems when you are unavailable.

## Expands Business Through Cross Selling

Increases sales with existing customers by stimulating the demand for currently purchased products and services; makes a proactive effort to build volume within established accounts by expanding the breadth of products used; monitors the potential for growth in volume by regularly tracking history and spotting trends or problems in need of a solution

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> <li>▪ Concentrates efforts on new business development at the expense of maintaining existing accounts</li> <li>▪ Expects the requirements of existing accounts to be static and automatically met without a need for monitoring or intervention</li> <li>▪ Waits for the customer to present a sales opportunity rather than monitor a purchasing history and take proactive steps to facilitate the reorder process</li> <li>▪ Misses opportunities to modify an existing business contract to include new solutions because of inattention to changes in the customer's needs</li> </ul>	<ul style="list-style-type: none"> <li>▪ Develops a sales plan for increasing business with existing customers that promotes an expansion of the current product line</li> <li>▪ Pays attention to trends or problems for which the current buying pattern does not provide a solution</li> <li>▪ Works to generate continued business from existing accounts, emphasizing steady maintenance over periodic 'home runs'</li> <li>▪ Tracks changes in the customer's organization or specifications that would alter the existing business contract</li> <li>▪ Monitors product usage or order replenishment status to ensure uninterrupted delivery of the desired benefits</li> </ul>

### Mindset Tips:

- Understand how each customer uses specific products and services, and keep customers informed of upgrades or product enhancements as an opportunity for additional sales.
- Understand that success hinges just as much on expanding the breadth and scope of products and services you sell to existing customers, as it does hunting down new prospects.
- Remember that monitoring customer buying patterns doesn't just facilitate the reorder process, but demonstrates to your existing customers that you are still looking to fulfill their needs.

### Success Tactics:

- Create a cross-selling strategy for each customer account; update your strategies frequently to align with changing customer needs.
- Check in with your customers often and stay current on industry trends so that you can expand business by introducing new or different products to existing customers.
- Stay alert to changes in your customers' organizations, such as mergers, acquisitions, or restructuring which trigger opportunities to sell additional products and services to meet their changing needs.
- Watch for problems or trends for which your customers' current purchase pattern does not provide a solution.
- Keep in touch with customers outside the sales process, to share ideas or add value not linked to a sales situation; stay alert in these conversations for clues to additional needs you can meet.
- Monitor your customers' usage history so that you can indicate the appropriate time for reorders.
- Take a proactive approach to the reorder process – monitor the customer's inventory so that you can spot new usage patterns and suggest reorders and new products before the customer requests them.

## Prepares and Delivers Effective Presentations

Focuses on sharing information in an exciting and memorable manner; prefers group presentations; focuses equally on preparing delivery and content; stages a presentation to promote a more intangible service or solution; responds to audience cues and reactions by altering a prepared presentation as it progresses

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> <li>▪ Prefers to share information in a more spontaneous and off-the-cuff manner</li> <li>▪ Does not prepare a presentation with the audience in mind, but starts with a standard framework and makes cursory adjustments</li> <li>▪ Without the structure of a prepared presentation, could fail to incorporate key components into the presentation or respond effectively to audience reactions</li> </ul>	<ul style="list-style-type: none"> <li>▪ Customizes the program to the audience, using minimal boilerplate components</li> <li>▪ Takes the time to prepare a studied presentation, injecting into the content and delivery the cues and jargon with which the audience can identify</li> <li>▪ Sensitive to audience feedback and adjusts the presentation to sustain their interest</li> <li>▪ Creates a memorable stage presence</li> <li>▪ Enjoys applause and attention when successful</li> </ul>

### Mindset Tips:

- Remember the importance of creating presentations that focus on the customer's needs – prepare by understanding what is important to them.
- Study your audience and work possible objections into your presentation – demonstrating that you understand their concerns will gain their interest.
- Remember that although taking a casual tone can make others comfortable, entering into a presentation without proper preparation could cost you the audience's attention.
- Commit to periodically gauging the audience's interest – adjust your message accordingly.
- Strive to overcome the urge to ad lib presentations – understand that others may view this as rambling.
- Do not equate the word formal with stuffy or bland – formal denotes structure and preparation, not delivery

### Success Tactics:

- Devote the time required to research your audience and select words and jargon that will best reach them.
- Be sensitive to the fact that different audiences will respond better to certain approaches – although having a standard presentation is fine, realize that you will need to customize it for each group.
- Do not rely solely on boilerplate presentations – research what is important to each audience as well as what language will best convey your message.
- Utilize all the resources at your disposal to ensure that your message is clear, understood, and memorable.
- Create presentations that will win the audience over – use props and visual aids to convey your message.
- Learn that by making your presentations memorable, you ensure that customers will think of you and your products first.
- Observe colleagues who have an exciting presentation style – try to inject your own sessions with some of their enthusiasm.
- Seek technical training so that you can incorporate high-tech elements into your presentations.
- Be creative – using your imagination, especially considering all the technological tools now, will make your presentations more memorable.

## Closes Through Personal Identification with the Product

Uses strong personal identification with the product to influence others to promote and sell the product line; keeps the distributor fired up and committed to buying into a program or plan; works with other salespeople to help them close the large or elusive deal; breaks up the selling cycle into small increments and sets goals for each step; maintains the pressure to move forward through each step without becoming too pushy or overbearing; proactively reinforces the purchase decision, recognizing the risk that a product or program can be supplanted by the competition

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> <li>▪ Expects the product or solution to stand on its own merits and does not find it necessary to reinforce the benefits and ensure that the distributor is comfortable with the result</li> <li>▪ Does not take advantage of an opportunity to reinforce the added value of the program by working with the distributor's salespeople to help close a deal</li> <li>▪ Excessive patience and a willingness to wait for developments in the sales process can result in displacement by the competition</li> <li>▪ Unknowingly loses customers early in the sales process because of not continually assessing their commitment throughout an extended sales cycle</li> </ul>	<ul style="list-style-type: none"> <li>▪ Personally believes in the benefits of the product or solution and is willing to stand behind the offering when competing for the distributor's interest or shelf space</li> <li>▪ Recognizes that the customer may have second thoughts or is being courted by the competition, and plants additional benefits or recalls to support the commitment to the buying program</li> <li>▪ Keeps the distributor motivated to promote the product line by working with distribution salespeople to close a challenging sale</li> <li>▪ Breaks the sales process into manageable steps, seeking continued agreement from the customer at each step before moving on</li> <li>▪ Applies enough pressure to keep a buying commitment from stalling but resists pushing the distributor into a neutral or negative position</li> </ul>

### Mindset Tips:

- Learn to read distributors spoken and unspoken cues to avoid being too aggressive in pursuit of the sale – be certain not to move on to the next step until you have gained agreement to the previous one.
- Understand the competitors' products/services and position your products/services in a more positive light in conversations with distributors and their salespeople.

### Success Tactics:

- Develop talking points that enhance the competitive profile of your products/services and ensure all members of the sales team can articulate them with customers.
- Create a sales process that reinforces the benefits of your offerings – share this process with distributors and their salespeople.
- Share stories of your successes so distributors and their salespeople can be excited about promoting your product or service.
- Demonstrate a belief in your products so that others will believe in them too and will work harder to promote them.
- Demonstrate enough enthusiasm and excitement about the proposed solution that you successfully fire up distributors and their salespeople.
- Provide motivational feedback to distributors or other salespeople to keep them engaged in the process – make it easy for them to promote your goods and services.
- Share stories of how other customers have achieved results with similar products or solutions and ensure all members of the sales team can relate these stories in sales calls.
- Treat distributors as you would internal colleagues and work with them, and their salespeople, to make the sale on behalf of your organization.
- Be proactive in following up with distributors to ensure the sales process continues to move forward – move in a stepwise fashion until you can be certain of their commitment.
- Create a list of product and service benefits and update it regularly to reflect innovations and new applications – share it with distributors and their salespeople so that they can reinforce those benefits to the end user.

## Engages Others in Learning and Assesses Understanding

Demonstrates a commitment to the continuous education and training of others as a means of increasing their overall competency and productivity; prepares more structured sessions to cover the most critical areas of learning for the audience; stays on top of information needed by colleagues and customers in an effort to serve as a resource; takes responsibility for motivating others to learn and retain key information; reinforces what is being taught through periodic repetition; regularly assesses individual and group competencies and routinely addresses them by adjusting the training

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

### Mindset Tips:

- Understand that the most effective training presentations are those that strive to make a difference by relating relevant information.
- Choose a few key issues or goals for improvement and focus your presentation on those subjects.
- Realize that by remaining up-to-date and passing along new information to your audience, you position yourself as a valuable resource.
- 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.
- 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.
- 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.

### Success Tactics:

- Accept the responsibility of remaining up-to-date so that you can be a constant resource to your salespeople.
- Build tracking systems into your program so that you can gauge whether or not you are effectively communicating your message.
- Combine “the basics” with more complex concepts to ensure learners are continuously upgrading their skills and knowledge.
- Commit to revising your training presentation every month so that new developments can be incorporated.

- 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.
- 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.
- 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.
- Create coaching 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.
- 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 to 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.
- Understand the need to prepare a formal training program in order to ensure that you sufficiently cover critical areas of learning.

## Coaches Others and Provides Timely Feedback

Understands the critical role joint calls play in the ongoing development of others; commits to using joint calls as opportunities to share expertise; demonstrates effective techniques; observes progress and judges the effectiveness of associates; dedicated to providing backup and expertise to help others secure a close; accepts a supporting role in the process and sets level of involvement in accordance with what others need

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> <li>▪ Can be tempted to take over for the individual rather than stand back and function as a final safety net (let them learn from their mistakes)</li> <li>▪ May focus on tracking administrative or procedural issues at the expense of taking time to mentor others</li> <li>▪ May not feel comfortable evaluating reports' performance and providing suggestions for improvement or alternate approaches</li> </ul>	<ul style="list-style-type: none"> <li>▪ Commits to conducting regular instructional exercises</li> <li>▪ Keeps focus on coaching and support to increase the level of expertise of the report, relegating own administrative or procedural tasks to a lower priority</li> <li>▪ Uses demonstrations to model effective techniques for less experienced individuals</li> <li>▪ Regularly observes others in action to offer suggestions and feedback for skill development</li> </ul>

### Mindset Tips:

- Realize that although joining others on sales calls may be time consuming, it is necessary to ensure the future success of the company.
- Resist the temptation to take the sales call out of the hands of the other party – they need hands on experience as well as coaching.
- Remember that it is not enough to merely point out where the other party is falling short, you also need to provide suggestions for improvement.
- Use the time between calls to discuss the previous sales call and make helpful suggestions – it is easier to discuss issues when they are clear in both of your minds.

### Success Tactics:

- Keep lists of suggestions that have proven successful for you so that you can share them with team members
- Make notes of difficult sales calls you may have closed and exactly what tactics proved useful.
- Position yourself as an added resource for the salesperson and an advocate for the customer.
- Uncover what administrative duties might be standing in the way of you making joint sales calls.
- Select the most experienced, successful, and trustworthy salespeople to accompany others on calls when you're unavailable.
- Devise a schedule wherein joint sales calls take top priority and other tasks are completed at the very beginning and very end of the day.
- Create a checklist for monitoring other salespeople and team members – provide helpful hints for each area in which the other party falls short.
- Lend advice to less experienced salespeople – you are not criticizing, but helping others to become successful.
- Ensure that you thoroughly explain the sales process – others need to understand how the successful completion of each step will bring them closer to making a sale.
- Use the time between calls to discuss the previous sales call and make helpful suggestions – it is easier to discuss issues when they are clear in both of your minds.
- Anticipate where a salesperson could fall short and compose a list of helpful hints that you and they can use as a reference guide.

## Leverages Expertise to be Recognized as Subject Matter Expert

Develops a comprehensive knowledge of products and potential applications; understands that up-to-date knowledge is required to maintain credibility as a subject matter expert with distributors and end-users; acquires knowledge through sources of published information supplemented with personal internal and industry contacts; keeps current on product/service developments through more formal learning opportunities; assumes the role of resident expert and develops product knowledge for the purpose of serving as a resource to others

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> <li>▪ Prefers to focus on the big picture and may not develop an awareness of product modifications at a more detailed level</li> <li>▪ Thinks they can stay ahead of the customer with only a superficial understanding of products and applications</li> <li>▪ Believes that most recent developments are cosmetic and do not require in-depth investigation</li> <li>▪ Embarrassed to admit when they do not know something, and will not feel comfortable asking for help or seeking the appropriate resources</li> <li>▪ Discounts study and training opportunities as an inefficient use of time and resources</li> </ul>	<ul style="list-style-type: none"> <li>▪ Acquires the comprehensive knowledge of products and product sales strategies required to keep on target with customer needs</li> <li>▪ Confident enough in expertise to establish themselves as an effective resource</li> <li>▪ Believes that there is always something new to learn</li> <li>▪ Recognizes that their credibility as a resource to customers is dependent upon the frequency and thoroughness with which product and applications knowledge is updated</li> <li>▪ Seeks or maximizes appropriate educational materials that will help them to stay on top of the job</li> <li>▪ Takes advantage of formal training opportunities that offer current product information</li> <li>▪ Utilizes the expertise of manufacturing resources as well as the input of end users to enhance existing product knowledge</li> </ul>

### Mindset Tips:

- Understand that there is always something new to learn about your product – keep up to date and do not rely on past experience to advise distributors' salespeople.
- Remember that your credibility as a resource is dependent upon the frequency and thoroughness with which you update your product knowledge.
- Realize that if you do not arm yourself with up-to-date and thorough information regarding your products, your distributors will go to a more knowledgeable supplier.
- Commit to being a specialist when it comes to your product offerings – do not be content with general knowledge.
- Remember that once you learn the basics of your product, your work is not over – staying up to date is key to indirect sales success.
- Do not be afraid to admit you don't possess an answer – only by asking for assistance can you gain first-hand information about your product.

### Success Tactics:

- Take time each week to research a specific facet of your product offering
- Challenge yourself to learn enough about your products that you can easily make suggestions and present alternative solutions.
- Ask a colleague or superior to regularly quiz you about your products to ensure you are staying informed.
- Subscribe to industry specific publications and then discuss your findings with your peers.
- Prepare regular status reports wherein you cover the latest modifications and developments to your product or service.
- Commit to acquiring information from a wide variety of sources – colleagues, the manufacturers of your product, and written materials.
- Enroll in a training or study program that will teach you the latest applications and developments for your product.
- Organize a study group with your peers – meet regularly to discuss product innovations, exchange information, and share points of view.
- Work with a knowledgeable colleague and take note of how they stay on top of their job.



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