

# Competency Development Toolkit

Outbound Inside Sales Benchmark



*Signature Profile*

## Benchmark Profile Description

The Outbound Inside Sales role is responsible for initiating phone/email contact with prospects and customers to sell assigned products/services, and often have a quota. In some organizations, there may be levels of specialization where inside sales may work with small customers that cannot be profitably serviced by the field sales force. Alternatively, other organizations may use these types of roles for cold-calling and scheduling appointments for outside salespeople.

## Predictive Competencies

- Makes Persuasive Presentations
- Builds Business by Proactive Customer Contact
- Maintains Active Pace
- Highlights Standard Benefits When Addressing Buyer Concerns
- Updates Working Knowledge of Offerings to Provide Recommendations
- Commits Extra Effort to Ensure Success

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

### 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, firsthand, 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.

## Builds Business by Proactive Customer Contact

Takes a proactive approach to finding additional business opportunities; comfortable with the networking and cold calling needed to find new prospects and customers; takes the lead in meeting people and building a contact base for new business development

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> <li>▪ Becomes discouraged by rejection and waits for prospects to raise their hands in interest</li> <li>▪ Treats prospecting as an activity to occupy slow periods</li> <li>▪ Lacks persistence in seeking new business opportunities</li> <li>▪ Timid about meeting people with the intent to interest them in the product offering</li> <li>▪ Uncomfortable with the personal interactions required to build the network of contacts needed to continually supply additional business leads</li> </ul>	<ul style="list-style-type: none"> <li>▪ Investigates all possibilities in a quest for additional business</li> <li>▪ Remains focused on the objective of expanding the customer base</li> <li>▪ Gives priority to building a contact base for new business development</li> <li>▪ Comfortable cold calling on prospects and building a network of contacts to find new leads</li> <li>▪ Keeps a high profile in organizations or activities that attract the interest of prospective customers</li> </ul>

### Mindset Tips:

- Accept rejection as part of the job – do not allow the chance of someone saying no prevent you from taking the lead in expanding your customer base.
- Remember that when a prospect rejects your products or services, they are not making a comment about you – remain objective and move on to the next potential lead.
- Understand that there is no shame in promoting your offerings to people you do not know – if your prospects are also businesspeople, odds are they have had to do the same thing in order to build their customer base.
- Always be prepared with a statement of your organization’s capabilities and be able to customize it to each individual prospect – this way you will not be as nervous when you are needed to make a cold call or talk to a potential prospect during a social function.

### Success Tactics:

- Make time in your weekly schedule to devote to networking and prospecting activities – make expanding your customer base your top priority.
- Do not limit your prospecting to those who show an obvious interest in your offering – commit to actively seeking new customers and view rejection as part of the job.
- Objectively examine the rejections you receive – ask yourself if you could have done something to turn the call into a positive one.
- Develop a script that will assist you in remaining in control of the interaction – include questions that will enable you to uncover opportunities within the prospect’s organization.
- Commit to maintaining a high profile at activities in which you may find potential customers – take the lead in meeting people and then steering the conversation toward potential sales opportunities.
- Research your competition’s key customers and identify contacts within those companies - network with your competition’s customers to assess their satisfaction with the competition and capitalize on opportunities to displace your competition

## Maintains Active Pace

Keeps up a brisk pace without becoming fatigued; pushes physical resources to the limit during periods of peak demand; takes pride in the amount of work accomplished; approaches work with considerable energy and stamina despite distractions or unreasonable demands

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> <li>▪ Adopts a methodical and deliberate pace that minimizes the potential for making mistakes</li> <li>▪ Experiences reduced physical capacity when pushed to meet significant physical challenges or faced with external pressures and may require an extended period of recuperation before tackling that volume of work again</li> <li>▪ May physically burn out too quickly by trying to do too much (tends to burn the candle at both ends)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Shows the capacity to work rapidly and efficiently, completing a considerable volume of work within tight deadlines, often in the midst of continuous change and shifting priorities</li> <li>▪ Tends to be highly energized and keeps up a brisk pace without becoming fatigued</li> <li>▪ Takes pride in being a hard worker and accomplishing a significant amount of work</li> <li>▪ Continues to push during periods of peak demand, exhausting physical resources, then resuming an active pace after immediately replenishing energy and endurance</li> </ul>

### Mindset Tips:

- Take frequent breaks in order to engage in ergonomic and stress exercises that will replenish your energy stores.
- Challenge yourself to work a bit faster each time you are assigned a task.
- Push yourself a bit more every day – it will give your physical resources a chance to adjust to a faster pace.
- Remember that some circumstances require swift action versus deliberate, methodical movement.
- Commit to modifying your behavior – plan to accomplish a set amount of work within a specific amount of time and gradually increase that quantity until you are accustomed to a faster work pace.

### Success Tactics:

- Work to ramp up your performance until your pace gradually increases; check, occasionally, to see how that gradual increase adds up over time.
- Incrementally reduce the turn-around time for your assignments so you can become acclimated to working at a faster pace.
- Instead of having a big breakfast or lunch, eat small, healthful snacks throughout the day in order to keep yourself energized.
- Pace yourself – rather than immediately rushing into a task and finding yourself out of steam rapidly, slow down so that you don't burn out so quickly.
- Try to find short, quick ways to increase your energy levels when you feel them drop such as taking a quick walk, diverting your attention to a different task in a different area, or some similar activity; each person in every work situation is different, so modify your diversions accordingly.
- Monitor your work habits and take note of when your energy levels drop – see what you can do to replenish yourself at those times of day.
- Schedule frequent, yet short, breaks so that you can recharge your batteries and be able to maintain a reasonable pace.
- Ask others what tricks they use to keep pace all day long; each person will have a different method, but one just might work out well for you.
- Analyze your work process and locate a particular step that slows your pace – rectify it and then move on to tweak another step until, bit by bit, the process is streamlined.

## Highlights Standard Benefits when Addressing Buyer Concerns

Recognizes that the limited opportunity for negotiation requires a questioning of customer objections to uncover the 'hot button' that established or standard features and benefits will address; actively listens and clarifies benefits; is well-informed of features and benefits; helps the prospect/customer understand why the proposed product offering is the best alternative

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> <li>▪ Misinterprets unspoken objections as nonexistent objections</li> <li>▪ Dismisses objections without validating the customer's concerns</li> <li>▪ Is argumentative in an effort to overcome versus resolve objections</li> <li>▪ Responds emotionally to objections or resistance perceived to be a personal attack</li> <li>▪ Overcomes concerns with textbook answers versus understanding and resolving them</li> <li>▪ Lacks information about the product/benefits, giving inconclusive answers that leave objections unresolved</li> <li>▪ Gives a long-winded explanation with more information than is required to gain the customer's cooperation and commitment, clouding the issue and possibly exerting pressure for an answer</li> <li>▪ Promises more than the product can reasonably deliver</li> </ul>	<ul style="list-style-type: none"> <li>▪ Brings objections to the surface and tackles them head-on</li> <li>▪ Chips away at objections rather than sidestep or give up on them</li> <li>▪ Listens to and agrees with the validity of the customer's concern</li> <li>▪ Familiar with a wide variety of products, along with their features and benefits</li> <li>▪ Understands the benefits that can pull a customer out of an established buying habit and into a better solution</li> <li>▪ Convinces the customer that the seller offers the best buy</li> <li>▪ Presents relevant information that will dispose of the objection, keeping the answer complete and concise</li> </ul>

### Mindset Tips:

- Commit to listening to customers' objections instead of assuming that you understand what issues are important to them.
- Realize that addressing objections can be a tedious process – gradually chip away at key issues rather than getting discouraged and brushing them aside.
- Strive to ask questions that will uncover hidden objections – assuming everything is fine will backfire later.
- Feel free to modify your sale offering to meet objections, but if you are unsure about a feature, do not make promises you may not be able to keep.
- Understand that your customers want to discuss their objections – if you don't listen, another salesperson will.

### Success Tactics:

- Hone your listening skills so that you can ensure that you are reacting to customers' objections instead of your own emotions.
- Research all the alternatives at your disposal so that you can creatively and appropriately address objections.
- When possible, alter your offering to suit the customers' unique needs.
- Find a co-worker or superior who is willing to role-play as a customer so you can practice probing objections and then addressing them through product and service modifications.
- Become conversant about all the benefits of your offering so that you can adequately describe how it can help customers achieve their goals.
- Devise a system by which you can uncover the root of objections and thereby address them.
- Create a checklist of questions that will enable you to uncover customers' expectations regarding your products or services.
- Familiarize yourself with your products and services, as well as your customers' needs, so that you can appropriately match them.
- Implement a decisive plan to uncover and then address customer objections – do not rely upon instinct or luck.

## Updates Working Knowledge of Offerings to Provide Recommendations

Possesses a working knowledge of products and applications as the backbone for understanding customers' needs and making suggestions for solutions; keeps abreast of (or contributes to) product/service developments, changes, and improvements designed to enhance competitiveness and achieve market preeminence; concentrates on acquiring knowledge that is less comprehensive and more focused on what specifically impacts the customer; builds knowledge base through real-world applications; uses product knowledge as a means to an end in providing appropriate suggestions to meet specific customer needs

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 investigation</li> <li>▪ Embarrassed to admit when something is not known, and rather than ask for help, can inefficiently invest time poring over written materials or waiting for a formal training opportunity</li> <li>▪ Absorbs information more effectively through a structured learning process than by listening to and learning from others in a less formal manner</li> </ul>	<ul style="list-style-type: none"> <li>▪ Acquires the necessary knowledge of products and product sales strategies required to keep on target with customer needs</li> <li>▪ Has the confidence in expertise to be seen as an effective resource</li> <li>▪ Believes that there is always something new to learn</li> <li>▪ Recognizes that credibility as a resource to customers is dependent upon the frequency and thoroughness with which product and applications knowledge are updated</li> <li>▪ Prefers to acquire knowledge through a personal sharing of information and hands-on observation</li> <li>▪ Taps a variety of individuals as resources and builds pool of knowledge from the knowledge and experiences of others</li> </ul>

### Mindset Tips:

- Remember that the better you are able to educate your customers, the more loyal they will be to you.
- Rather than trying to learn about all new product developments, limit your focus to those that are most valuable to your customers.
- Realize that not all information can be gained from written sources – some require hands-on experience, which you can gain from an expert in the specified field.
- Admit when you don't know the answer to a customer question – admitting that you don't know and then finding the answer will lend you more credibility than bluffing.
- Understand that researching topics that are important to your customers is just another way of providing excellent service.

### Success Tactics:

- Create a list of issues that customers need you to be able to discuss – do your deepest research on those issues.
- Commit to investigating a new modification or application every week or month.
- Ask someone to test your knowledge to ensure that you can handle tough customer questions.
- Read summaries of new product developments and keep track of those applications that will most affect your customers – research those topics at length.
- Write and submit a report on each new product development – writing will help you to remember each application and also ensure that your information is detailed and accurate.
- Develop a system for filtering and acquiring the knowledge that will be of the most help to your customers.
- Ask questions when you don't know the answer – and go to those who can provide real world examples.
- Resolve to find more than merely book sources of information – for each topic you research, find reading material on the subject, as well as an advisor to link that knowledge to real life.
- Before performing research, make yourself aware of all the information-gathering avenues available.
- Keep track of your most useful and reliable sources – it will make research easier and more efficient.

## Commits Extra Effort to Ensure Success

Thrives on working; tends to achieve higher results in direct proportion to the time they are willing to commit to their work; remains focused on the goal and not easily discouraged or distracted; uses work as an opportunity for interaction and incorporates interpersonal contacts into task accomplishment; sees work as a major source of personal satisfaction

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> <li>▪ May embrace a somewhat rigid separation of professional and personal commitments that limits flexibility in balancing the time and resources devoted to work and leisure</li> <li>▪ More inclined to work a set schedule of hours than to commit resources as required by the objective</li> <li>▪ Distinguishes personal time from work and career commitments and not likely to make consistent sacrifices in their personal lives to accommodate extraordinary advancements in their work objectives</li> <li>▪ Becomes distracted by unexpected obstacles or may not effectively plan to deal with job demands</li> <li>▪ May not recognize that opportunities to advance goals can be present in the personal interactions that occur in the workplace</li> </ul>	<ul style="list-style-type: none"> <li>▪ Seeks to balance work and life priorities while committing time and resources to results accomplishment that surpasses what is just acceptable or expected</li> <li>▪ Dedicated to achieving business results, even at some personal sacrifice</li> <li>▪ Defines themselves to a great extent by their work and derives personal satisfaction from success and accomplishments in their career</li> <li>▪ Builds into the schedule the time required to lay the groundwork and develop the plans for achieving work objectives</li> <li>▪ Retains control of objectives by preparing action steps and evaluating progress</li> <li>▪ Remains focused when the commitment to their work is threatened by internal or external distractions</li> <li>▪ Enjoys finding opportunities to mix personal interaction with goal accomplishment</li> </ul>

### Mindset Tips:

- Be willing to sacrifice personal time to accomplish important tasks and develop skills that will assist you in reaching career objectives.
- Use social events as an opportunity to network and/or learn more about customer needs and expectations.
- Understand that socialization can provide you with sources of information that could help you meet career goals – having a network of experts at your disposal can make obstacles easier to overcome.
- View each contact as a doorway to new information/opportunities.

### Success Tactics:

- Identify the overall goals you are working toward and then determine what you need to do to achieve them – make the completion of these tasks your top priority.
- Set aside time each week to work on developing skills/capabilities you will need to accomplish career objectives.
- Ease into a more demanding schedule by setting aside a few days a week where you will work until your daily tasks are complete, rather than working until a pre-set quitting time.
- If goal accomplishment is not a sufficient motivator in its own right, find a personally satisfying reward that will help you to stay focused on completing daily tasks and, ultimately, achieving career success.
- Find a mentor who can help to keep you inspired – when you feel that you’re losing the drive to succeed, go to this person to discuss your goals and reinforce what you need to do to achieve them.
- Speak with successful colleagues – ask them what tools they use to work more efficiently and try to apply them.
- Analyze your workday and identify and minimize factors preventing you from accomplishing important tasks.
- Use all available technology tools to streamline your work processes for maximum efficiency and effectiveness.
- Challenge yourself to produce higher quality results – at the close of each week, examine the results you’ve produced and determine what you can do to improve them next time.
- Before attending social functions, make a list of questions that will keep you focused on the business aspect of the interaction as well as provide a means for breaking the ice.





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