

## Competency Development Toolkit

Relationship Solution Sales Benchmark



*Signature Profile*

## Benchmark Profile Description

The Relationship Solution Sales role is responsible for acquiring new customers and servicing existing ones within an assigned territory/market – usually 20/80 ratio of new to existing business. The emphasis is on maintaining and growing sales within existing accounts by identifying additional needs and other departments/functions within the customer organization who can benefit from their solution. They are tasked with strengthening relationships with multiple constituents within assigned accounts and for advocating on their behalf, making it easy to do business with their firm.

## Predictive Competencies

- Tailors Style to Fit Customer Expectations
- Solicits and Acts on Customer Feedback
- Builds Business by Proactive Customer Contact
- Measures Personal Success by Achieving/Exceeding Quota
- Seeks Professional Recognition
- Adapts Sales Approach to Match Buyer Motivations

## 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.

## Solicits and Acts on Customer Feedback

Seeks customer feedback regularly to verify satisfaction and uncover minor issues which could escalate if left unattended; solicits suggestions for continuous improvement and demonstrates personal attention to the customer even when there is no problem; listens to feedback without judgment or defensiveness, remaining focused on results rather than personal feelings; stays logical and objective and refrains from expressing personal frustrations; ensures future business by anticipating and removing potential sources of dissatisfaction

| LOW SCORES   | HIGH SCORES  |
|--|--|
| <ul style="list-style-type: none"> <li>▪ Assumes that a customer will speak up if there are problems but is otherwise satisfied</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>▪ Finds it difficult to keep emotions in check and remain logical when presented with suggestions for improvement</li> <li>▪ Takes customer feedback or criticism as a personal jab and may inappropriately display a negative response</li> </ul> | <ul style="list-style-type: none"> <li>▪ Demonstrates continued personal attention to the customer, calling regularly and soliciting suggestions for improvement</li> <li>▪ Disciplined and consistent in initiating contact with the intent of monitoring satisfaction and detecting potential problems</li> <li>▪ Welcomes opportunities to demonstrate a willingness to make the customer's experience even better</li> <li>▪ Aims emotional intensity at addressing a customer's needs or concerns, not at the customer personally</li> <li>▪ Does not allow the mood or feeling about a customer to alter the degree or quality of the follow-up</li> <li>▪ Maintains a business relationship versus a social relationship in 90% of the contact</li> </ul> |

### Mindset Tips:

- Understand the importance of maintaining regular contact with customers through regular visits so that you can monitor satisfaction levels and address potential problems.
- Take personal responsibility for uncovering possible issues – do not wait for the customer to complain, but search for seeds of dissatisfaction and immediately address them.
- Use feedback from customers to identify ways to serve them better in the future and view their complaints as challenges that, once overcome, will improve your relationship with them.
- Realize that everyone is eventually faced with a customer complaint – therefore it only makes sense to remain objective and work to address the problem.
- Commit to demonstrating personal attention to customers even when there are no problems evident – doing so will prevent issues from snowballing and convey a sense of caring to your customers.

### Success Tactics:

- Regularly collect feedback from customers about the quality of products and services they receive from you and your organization.
- Check-in with customers frequently, outside a sales situation, to inquire about their level of satisfaction.
- Train yourself to regularly call on customers so that you can spot potential problems before they get out of hand.
- Do not wait for customers to contact you with complaints – be proactive by designing a detailed call schedule that includes questions that will unearth areas that require improvement.
- Thank customers for alerting you to problems with your products or services – customers who complain may be more open to doing business in the future.
- Actively solicit feedback on where you could provide better service – use this information to improve your performance and demonstrate dedication to your customers.
- Start each customer call by talking about what has worked well in the past, and what you can be doing differently to serve them better.
- Respond to customer complaints and issues in a calm, non-defensive manner; acknowledge their right to raise issues and concerns.

## 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

## Measures Personal Success by Achieving/Exceeding Quota

Takes pride in consistently meeting or exceeding quota and assumes personal responsibility for monthly sales attainment; continually pushes self and uses that stress as a positive driver to focus on the tactics which will produce the necessary sales results

| LOW SCORES  | HIGH SCORES  |
|---|--|
| <ul style="list-style-type: none"> <li>▪ May adopt a casual or relaxed approach that fails to project personal dedication to achieving or surpassing sales targets</li> <li>▪ May be satisfied with moderate growth in sales</li> <li>▪ May not sustain the intensity needed to consistently meet or exceed sales objectives</li> <li>▪ Is comfortable with achieving average results, rising above the bottom of the performance chart but not striving to be the best</li> <li>▪ Lowers goals to reach a level of success that is easier to accomplish</li> <li>▪ Prefers a more predictable and stable work environment in which personal compensation is not so closely tied to production results</li> </ul> | <ul style="list-style-type: none"> <li>▪ Driven to achieve or exceed targeted results and uses sales as a means to get there; hungry to be a top producer</li> <li>▪ Holds results achievement to a high personal standard</li> <li>▪ Believes in taking personal responsibility for the level of success achieved</li> <li>▪ Thrives in a traditionally competitive sales environment and uses sales as a vehicle for measuring personal success</li> <li>▪ Balances drive and intensity that characterize their sales approach with giving customers attention and time needed to ensure continued satisfaction</li> </ul> |

### Mindset Tips:

- Challenge yourself to change behavior patterns that could hinder your performance.
- Push yourself to compete with co-workers – do not allow yourself to slip to the bottom of the performance charts out of a fear of hurting others' feelings.
- Take stock of where you want to be in your career – use sales as a means of satisfying those personal goals.
- Make small, gradual adjustments to your work habits – seeing the results from these small changes will inspire you to make more modifications, until you achieve the results you desire.
- Since you are not especially driven to exceed sales goals for their own sake, find what motivates you and use that inspiration to become a top producer.

### Success Tactics:

- Compare your results with those of others – analyze where you may be falling short.
- Increase the number of sales calls you make – the greater the number of sales calls, the greater the odds of making a sale.
- Gradually increase sales objectives until you reach the level of your peers.
- Take each month at a time – analyze each month's results and try to improve upon them.
- If possible, go on a sales call with a top producer and take note of the techniques they use to ensure they meet and exceed sales goals – implement these techniques in your own work routine.
- Seek the advice of superiors and colleagues – find out what they do to maintain the intensity required to be a top producer.
- Commit to increase your output by a set amount each week or month, when you feel comfortable reaching that goal, increase it again – repeat until you are on par with other top producers.
- Analyze your work schedule – eliminate distractions that take your focus away from meeting sales goals.
- Find a colleague with whom you can pair yourself – critique each other's work patterns and provide motivation for each other when intensity and drive are lacking.
- Set a new goal each month or week and do whatever is necessary to achieve it.

## Seeks Professional Recognition

Uses position and prestige to positively influence others; enjoys public recognition and acclaim of achievements; wants to be seen as important and establishes credibility through title and credentials

| LOW SCORES  | HIGH SCORES   |
|---|---|
| <ul style="list-style-type: none"> <li>▪ Self-conscious about a public display of success and achievement and may diminish own ability to influence others by downplaying achievements and capabilities</li> <li>▪ Expecting accomplishments to speak for themselves, they may find it difficult to establish credibility with or make an impression on individuals unfamiliar with any professional credentials</li> <li>▪ May associate a widely acclaimed role with bragging and could miss opportunities to have an impact on others because they're uncomfortable being singled out and publicly acknowledged for success</li> </ul> | <ul style="list-style-type: none"> <li>▪ Seeks the rewards and public recognition that define success and elevate status in the eyes of those individuals they want to influence or impress</li> <li>▪ Uses credentials as a means to establish credibility</li> <li>▪ Uses public acknowledgement of professional status and accomplishment as a tool to make a positive impact on others</li> <li>▪ Gets people to take notice and give attention by promoting own accomplishments and publicizing any success</li> </ul> |

### Mindset Tips:

- Act as your own public relations expert – do not expect your accomplishments to speak for themselves.
- Remember that trying to contradict praise can have the opposite effect of drawing more attention to you.
- Remain gracious - commit to accepting accolades with a grateful or appreciative smile.
- Realize that accepting praise graciously will earn you the respect of your followers without compromising your low profile.
- Understand that there is nothing wrong with being acknowledged for a job well done – it increases credibility among colleagues and subordinates.
- Admit that you deserve and need a certain amount of recognition – suppressing this need may cause resentment.
- Accept public accolades for your work as a means of bolstering your influence over others.
- Learn that if you don't acknowledge your own efforts, no one else will – it is up to you to make others aware of your accomplishments.
- Do not see self-promotion as bragging – so long as your efforts simply seek to make others aware of your accomplishments, no harm will be done.
- Remember that unless you make your credentials known, others may not take your authority seriously.
- Realize that although influencing others from behind the scenes is fine, certain situations call for a more authoritative approach.
- Rather than focusing on the discomfort public praise causes you, focus on what you can do with the credibility and respect that comes from that praise – it will make accolades more tolerable.

### Success Tactics:

- Build credibility by promoting your efforts and gaining the recognition you deserve.
- Ask that the recognition you gain be delivered in a more low key fashion.

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

### 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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