

Competency Development Toolkit

Sales Management Benchmark

Signature Profile

Benchmark Profile Description

The Sales Management role is responsible more for building the quality and productivity of salespeople than for managing customers and is driven by the team's success. They are tasked with hiring, developing, motivating, and coaching individual sellers while controlling the focus, direction, and performance of the team. Key activities include product/service and sales training, managing the team, monitoring sales projections and budgets, and championing new initiatives.

Predictive Competencies

- Engages Others in Learning and Assesses Understanding
- Coaches Others and Provides Timely Feedback
- Directs and Manages in a Team Setting
- Leads with a Profitable and Efficient Approach
- Champions Initiatives and Leads Change
- Prepares and Delivers Effective Presentations
- Focuses on Measurable Outputs

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

Mindset Tips:

- 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.
- Work with a colleague who has exceptional training skills – review your presentation with this person to see where your program can be streamlined and where more substance needs to be added.

Coaches Others and Provides Timely Feedback

Understands the critical role modeling and demonstration play in the ongoing development of direct reports; spends sufficient time with direct reports to provide guidance and coaching where needed and commits to regularly creating opportunities to share expertise; provides instruction, positive models, and opportunities for observation in order to help others perform successfully and develop skills; encourages questions to ensure understanding; observes progress, judges the effectiveness of reports, and provides timely and appropriate feedback on progress

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> ▪ 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) ▪ May focus on tracking administrative or procedural issues at the expense of taking time to mentor others ▪ May not feel comfortable evaluating reports' performance and providing suggestions for improvement or alternate approaches 	<ul style="list-style-type: none"> ▪ Commits to conducting regular instructional exercises ▪ 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 ▪ Uses demonstrations to model effective techniques for less experienced individuals ▪ Regularly observes others in action to offer suggestions and feedback for skill development

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.

Directs and Manages in a Team Setting

Possesses a span of control that allows direct access to all of the key staff people in the group or organization; practices a hands-on, face-to-face coaching style and seeks personal involvement in day-to-day tasks; utilizes a walk-around style to follow up and ensure that delegated tasks are effectively completed

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> ▪ Gives insufficient information or explanation when assigning tasks ▪ Does not expect to repeat information or find it necessary to restate objectives or performance criteria ▪ Assumes subordinates work without intervention and experiences frustration when results do not meet expectations ▪ Prefers to direct others through more formal processes and expects them to perform as agreed without reminding or coaching ▪ Resists personal involvement in monitoring or assisting with subordinate efforts and results, expecting them to be self-motivated and self-directed ▪ Assigns tasks but abdicates responsibility 	<ul style="list-style-type: none"> ▪ Provides full and complete information in making assignments, including timelines and results expectations ▪ Ensures that subordinates understand the measurements that monitor progress toward goals and results ▪ Consistently follows up to track results and understands the need for occasional repetition or reinforcement of guidelines ▪ Does not abdicate in delegation, but stays personally involved, using first-hand knowledge of the steps for achieving the goal to coach less experienced individuals ▪ Broadens control by giving subordinates a chance to develop their skills and contribute to the organization, but remains a presence so that deviations from the goal can be quickly identified

Mindset Tips:

- Realize that the time taken to reinforce evaluation criteria and monitor progress will ultimately save time lost on costly rework.
- Make yourself available for questions and comments from subordinates – the extra time you take to clarify assignments will pay off when they reach objectives.
- Commit to performing regular walks around the work area to ensure that subordinates are on track and meeting deadlines.

Success Tactics:

- Work on improving your communication skills so that subordinates are clear about expectations and how to meet them.
- Ensure that subordinates understand assignments by restating and reinforcing timelines and evaluation criteria.
- Devise a way to monitor constituents so as to ensure that they are on track in meeting objectives.
- Consistently follow up on communication to ascertain whether or not constituents fully grasped all elements of the assignment.
- Assist subordinates in prioritizing tasks when timelines for different projects conflict.
- Keep your message clear and repetitive – check often to ensure that others are clear about objectives.
- Formulate questions that will show that constituents are focused on objectives.
- Take the lead in directing subordinates toward goal fulfillment – do not wait for others to come to you with news of a problem.
- Implement a system to monitor job progress and make corrections as necessary.
- Watch subordinates perform tasks and share your knowledge to provide tips that will make them work more effectively.
- Enroll in a management or communication class so that you can improve the skills required to assign projects and then monitor them until successful completion.
- Actively support subordinates – provide them with the things they need to successfully complete objectives.

Leads with a Profitable and Efficient Approach

Manages the allocated resources to produce optimum bottom-line results; works to understand and control the key factors that influence profit production; balances the priorities and skills of self and others to generate profitable results; won't become distracted by issues that don't influence the bottom-line; protects the interests of investors, employees, customers, and others who depend upon the success and survival of the company as a result of its ability to generate profits

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> ▪ Does not see the production of profit as the organization's primary objective ▪ Focuses on accomplishing process steps and administrative tasks to tie up loose ends and deal with immediate demands regardless of their overall impact on the bottom-line ▪ Cannot find the time or justify the effort to establish and review financial controls ▪ Bases evaluations of an outcome on the effort extended or the elegance of the result rather than the profitability of the result ▪ Has a strong concern for personality issues and having people feel good about their results as the true measure of success ▪ Does not consistently implement steps to monitor key financial or customer data that can potentially impact bottom-line profitability ▪ Becomes distracted from the primary goal of corporate profitability by 'squeaky wheel' situations or single function demands that offer a short-term appearance of increased efficiency or reduced costs 	<ul style="list-style-type: none"> ▪ Sees primary role as generating profit for the business ▪ Entrepreneurial with a bottom-line versus administrative orientation ▪ Has a realistic grasp of the financial aspects of the organization, shows responsiveness to the need for economies and cost control, and is able to draw meaningful implications from financial data ▪ Places other business concerns as secondary to profit generation ▪ Focuses on approaches and techniques designed to increase production or decrease costs, enhancing overall organizational profitability ▪ Has little time or patience for ideas or programs that do not impact the bottom line ▪ Does not become distracted by or waste time on trivial problems, unnecessary paperwork, or personality issues that don't affect profitable results ▪ Sees the big picture beyond departmental or single function concerns that on their own will not positively impact overall profitability

Mindset Tips:

- Remember that the production of profit is the organization's primary objective.
- Take the time to review financial controls – make adjustments if current processes are not producing a profit.
- Work to understand those factors – such as sales figures, competitive threats, and customer needs – that influence profit production and monitor them consistently.
- Take responsibility for protecting investors, employees, customers, and others who depend upon the success of the company.
- Do not allow yourself to become distracted by smaller tasks which may temporarily reduce costs but do not add to overall profitability – such as administrative duties or personality issues.
- Learn to see the big picture beyond your department in order to focus on overall profitability.
- Weigh options and approaches by their positive impact on the bottom-line.
- Before making a decision, take into account the cost to do the activity and compare it to the return.

Success Tactics:

- Evaluate your current procedures – analyze their impact on the bottom-line.
- Create a list of financial objectives, such as percentages of profits to be generated, so that you can remain focused on producing bottom-line results.
- Analyze your goals and determine how they affect the bottom line – realign your objectives so that they include the production of profit.
- Commit to developing a system that can monitor cost and sales figures in order to predict potential problems.
- Analyze your daily routine – free yourself from those tasks that take your focus away from the bottom-line.
- Allocate paperwork and small administrative duties to others so that you can dedicate your time to profit producing activities.
- Delegate projects and programs that are worth pursuing, but have little impact on the bottom-line.

Champions Initiatives and Leads Change

Demonstrates a willingness to take action on problems or opportunities without prompting; possesses the intrinsic desire and willingness to push toward achieving a desired goal or end-state without suggestion from others; prepares alternatives so the outcome is not jeopardized by unexpected barriers; exhibits the desire to blaze new trails as a means to an end

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> ▪ Uncomfortable developing a solution to a problem or trying a different approach without positive directives from a higher authority ▪ Hesitates to push own ideas or drive new goals ▪ May be too willing to leave well enough alone and conforms to established rules and principles ▪ Uncomfortable pushing beyond easy or traditional responses to creative or original thinking ▪ Tends to wait patiently for situations to settle over time or to correct themselves in a more natural fashion 	<ul style="list-style-type: none"> ▪ Champions new initiatives and identifies opportunities or issues requiring change without prompting ▪ When barriers to goal accomplishment are encountered, is willing to introduce and implement a solution throughout own sphere of influence ▪ Willing to take the lead, even if others don't initially understand or approve ▪ Focuses effort and resources on initiatives or solutions that will positively contribute to the desired result; does not simply try to 'build a better mousetrap' ▪ Changes the present status in order to improve the position of the group or organization in meeting its objectives ▪ Installs targeted, selective changes that provide real added value to the organization ▪ More than simply overcoming a negative or preventing a loss, the solutions or changes initiated leave the job (task, project) with something gained

Mindset Tips:

- Remember that so long as you have a contingency plan, calculated risks can produce big gains.
- Remember that leaving problematic situations to rectify themselves often makes things worse.
- Commit to being proactive in the face of obstacles – confront and solve them.
- Just because a process has been established and accepted does not mean it's the best way to do things.
- Know that, as a leader, it is your place to examine current systems and find solutions.
- Keep in mind that necessity is the mother of invention – problems are opportunities to create new and better solutions.

Success Tactics:

- Track your group's productivity on a regular basis – analyze where slowdowns occur so you can work to avoid them in the future.
- Keep an eye out for potential obstacles – knowing that problems can be prevented will fuel your desire to take action.
- Take the lead, even if others disapprove or do not understand.
- Challenge yourself to blaze new trails, but keep alternative plans in mind.
- Take the initiative by introducing and implementing solutions to obstacles, rather than waiting to be directed to do so.
- Actively develop new solutions and processes in an effort to champion your group's productivity.
- Attend a management course that emphasizes the use of original thinking in overcoming barriers.
- Attempt to think outside the box when addressing productivity issues.
- Be proactive in changing the status quo when it is inadequate in achieving goals.

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

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.

Focuses on Measurable Outputs

Uses available time to produce tangible results; judges effectiveness by the quantity of what has been accomplished in a given time frame; derives personal satisfaction from accomplishing measurable outputs

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> ▪ Can too easily lose interest in results-oriented activities in favor of more satisfying opportunities offered in the arenas of personal relationships or influence and power ▪ May judge effectiveness in task achievement using standards of quality, creativity, or efficiency rather than measure accomplishment by the sheer quantity or volume produced ▪ Tends to be rather casual or informal about tracking progress in results achievement and is comfortable with variable output levels 	<ul style="list-style-type: none"> ▪ Focuses on the quantitative measure of results produced, whether engaged in a repetitious, singular activity or frequently changing and diverse tasks ▪ Gains personal satisfaction from producing tangible results ▪ Judges effectiveness by how much is accomplished in a given time frame ▪ Establishes concrete dimensions and steps that can become quantifiable measures of their progress

Mindset Tips:

- Hold yourself accountable to the same measurable objectives as everyone else.
- Determine your most comfortable approach to tasks and use that to produce the expected quantitative results.
- Decide what can best motivate you to reach goals and use those factors, instead of quantity, to determine how you go about your job.
- Although short-term, measurable results are important, try to distract yourself by focusing on the more personally meaningful rewards of your job, while still achieving quantitative objectives.
- Understand that although you may not be motivated to produce measurable results, you are still required to meet the same quantitative objectives as everyone else.
- Realize that how much you produce is just as important as what you produce – commit to striking a balance between the two.

Success Tactics:

- Ask superiors what is expected of you and do what you can to reach those goals – with clear objectives in place you can achieve what is demanded without focusing on actual quantities.
- Find your personal motivators and try to correlate them with quantitative objectives in order to reach goals.
- Challenge yourself to reach a specific measurable goal each day – gradually raise that amount until you are on par with your colleagues.
- Announce your quantitative goals to your co-workers so that you are committed to reaching them.
- Reward yourself for reaching measurable objectives – for example, if you seek recognition from your peers, make your achievements known to those who can lend praise.
- Devise a system by which you can measure your daily output – you may be falling short of objectives simply because you do not pay attention to the quantity of the results you produce.
- Find what drives you to produce tangible results and remain focused on those motivators.
- If you thrive on competition or recognition, organize a friendly contest to see who can produce the most quantitative results within a specific time period.
- Train yourself to believe that producing short-term measurable outcomes is your top priority.



937.259.1200 | 800.254.5995

ChallyAssessment@chally.com | www.chally.com