

Competency Development Toolkit

Sales Team Lead Benchmark



Signature Profile

Benchmark Profile Description

The Sales Team Lead role consists of both supervisory and sales responsibilities. They supervise a team of sellers, while carrying their own book of business. In some organizations, team leaders are considered “super-salespeople.” They typically do not have responsibility for hiring and performance management but serve as the first point of contact for seller questions and day-to-day support.

Predictive Competencies

- Continuously Develops Sales Leads
- Uses Standard Discovery Questions to Qualify Prospects
- Makes Persuasive Presentations
- Commits Extra Effort to Ensure Success
- Advocates for Customers to Drive Results
- Adapts Sales Approach to Match Buyer Motivations
- Proactively Mentors and Supports Others
- Coaches Others and Provides Timely Feedback

Continuously Develops Sales Leads

Demonstrates the initiative to uncover sales opportunities; actively attracts the interest of potential customers; networks to increase contacts; stays on top of market conditions to uncover new leads; consistently follows up with leads to assess their interest in the product/service offering

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> ▪ Limits networking opportunities by being drawn into social or casual interactions, or by spending time with enjoyable or already familiar people ▪ Waits for prospects to raise their hands, believing that marketing efforts or the product itself will attract interest ▪ May limit networking efforts to those times when the sales pipeline is empty ▪ May be inconsistent in creating and following a process that systematically and continually casts a net with the expectation of eventual success ▪ Becomes frustrated or discouraged if a successful 'hit' is not achieved in a fairly short period of time ▪ May be satisfied with 'cherry picking' and find it tedious to churn through a stream of new contacts to identify the warm or lukewarm leads 	<ul style="list-style-type: none"> ▪ Methodically and regularly networks to develop a prospect list, regardless of the number of leads in the sales funnel ▪ Develops a frequent and familiar personal profile in organizations or activities that attract the interest of prospective customers ▪ Recognizes opportunities to uncover hidden or less obvious prospects by monitoring the competition and keeping on top of market conditions ▪ Remains pragmatic and objective, versus intuitive and emotional, believing that the payoff comes from steadily working the numbers ▪ Hard-driving and persistent, and tends to downplay social involvement that may interfere with or drain time from prospecting efforts ▪ Organizes contact information in order to systematically follow up on leads

Mindset Tips:

- Regularly work the numbers without becoming discouraged – although the majority of prospects will not become customers, you never know which leads will pay off.
- Recognize that in order to achieve sales success the sales funnel must be kept full at all times – if only 10% of prospects become viable customers, the greater the number of contacts in the funnel, the more sales you will make.

Success Tactics:

- Set aside a specific time each week to conduct prospecting activities – make lead generating your top priority and clear your schedule of those activities that distract you from expanding your prospect list.
- Establish a weekly goal for prospecting activities and strive to meet it, i.e., add five new contacts to your network each week, or make three cold calls to potential customers each week.
- Keep on top of new businesses opening in your territory – make a call to introduce yourself and become recognized with the products and services you offer.
- Join appropriate local business and industry organizations and attend meetings regularly.
- During networking events, look around the room to identify people you don't know – sticking with contacts you already know is cherry-picking and will lead to a rapid depletion of the sales funnel.
- Use all available company information technology tools at your disposal to collect and organize prospect data.
- Monitor the competition and stay on top of sales trends – doing so can introduce a whole new sphere of prospects.
- Identify key decision makers within the target companies that you want to call on and use the resources in your network to secure an introduction.
- Be prepared with a general statement of your organization's qualifications and the benefits to the target customer – armed with this information, meeting new prospects will be less intimidating.
- Do not wait for prospects to contact you – follow up on initial meetings by keeping contact information organized and up-to-date.

Uses Standard Discovery Questions to Qualify Prospects

Uses a formula or series of questions to determine the prospect's fit with the product; expects to sell to the majority of prospects since they are known to need the seller's products; reacts quickly and objectively to the answers to standard questioning by disqualifying the prospect or proceeding through the selling process

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> ▪ Uses interest in a prospect's needs or problems or compatibility with contacts as the criteria for spending time with them in the selling process ▪ Finds it difficult to narrow focus to the quality as opposed to the quantity of the business available ▪ Exhibits too much optimism and not enough pragmatism to cut loose potential business that would not be profitably serviced ▪ Finds it difficult to be objective in assessing the potential of demanding or challenging contacts 	<ul style="list-style-type: none"> ▪ Asks tough questions around profitability, capacity, and readiness to buy when evaluating a prospect for potential business opportunities ▪ Uses a formula approach to qualifying prospects that addresses typical interest points, such as price and ability to deliver ▪ Does not allow time to be consumed by prospects who should be disengaged or deferred based on the quality of business they will provide ▪ Remains emotionally detached from the prospect's situation, staying objective in assessing the potential for profitable business

Mindset Tips:

- Remain objective when qualifying prospects – do not go into the meeting with erroneous assumptions.
- Understand that not all sales are equal – realize that costs may be incurred for your company if the prospect does not properly fit with the product or your organization's needs.
- Do not become distracted by prospects who should be disengaged – if prospects are ready to buy and have profit potential, it will be obvious.
- Remain emotionally detached from the prospect's situation – do not allow your personal preferences to cause you to waste time with a prospect who will not yield gain for the company.
- Commit to taking care of those customers who will take care of you.
- Realize that the more time you spend with prospects who are not a good match for the company, the less time you have to spend with those prospects who will improve the bottom-line.
- Remember that only 10 percent of prospects are actually ready to make a purchase at a given time – it is up to you to sift through leads to locate that 10 percent.
- Learn that all customers do not deserve equal amounts of attention – in order to improve your sales results, you need to cut loose those prospects who do not match your products or needs.

Success Tactics:

- Engage in role-playing with a colleague in order to refine your ability to uncover a customer's potential to commit to making a purchase.
- Establish criteria by which you can determine the customer's true needs and whether your offering can fulfill them while making a profit for your organization.
- Get feedback from existing customers in order to determine what factors influence their purchase decision – use this information to devise a system by which to qualify prospects.
- Create a list of thorough, yet inoffensive, questions that will rate a prospect's potential as a customer.
- Develop a scoring system for prospects in which they are rated by profitability, capacity and readiness to buy.
- Work with a successful salesperson and take note of how they qualify leads – utilize their questions and techniques in your own routine.
- Get pointers from colleagues and superiors on how to walk away from a cold deal.

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

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.

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

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.

Advocates for Customers to Drive Results

Consistently achieves above-average sales results by understanding the customer's business, empathizing with their problems and setting a plan to meet their needs; tirelessly focuses on building strong relationships with customers by acting on their behalf to work the seller's internal systems to meet their requirements; sees partnering with customers as the efficient method to reach personal sales career goals

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> ▪ May adopt a casual or relaxed approach that fails to project personal dedication to achieving or surpassing sales targets ▪ Can be content with marginal success or lowers goals to reach a level of success that is easier to accomplish ▪ May not sustain the intensity needed to consistently meet or exceed sales objectives ▪ Wants to be successful on own terms without tying efforts or results to effectively fulfilling customer requirements ▪ Achieves results that will support career progression more so than strengthen partnerships with customers ▪ Can be impersonal or detached in approach to the sales process, minimizing the opportunity to build a customer alliance 	<ul style="list-style-type: none"> ▪ Driven to achieve or exceed targeted results and uses sales as a means to get there; hungry to be a top producer ▪ Holds results achievement to a high personal standard ▪ Believes in taking personal responsibility for the level of success achieved ▪ Unwilling to have goal achievement derailed by internal politics or bureaucratic procedures ▪ Promotes a sense of partnering with customers ▪ Takes the first step to establish a trusting relationship that assures customers of a commitment ▪ Genuinely interested in understanding customer needs and works the company's internal systems to satisfy those needs ▪ Collaborates with a network of support resources to satisfy customer requirements

Mindset Tips:

- Understand how setting high standards will aid you in achieving excellent sales results.
- Remember that you are not locked into producing mediocre results – you have leeway in stretching company policy in order to attain customer satisfaction.
- Push yourself to control sales results – working around the system is commendable if the results produced justify your efforts.
- Do not be afraid of ruffling feathers by stepping outside standard procedures – pushing beyond boundaries is what helps a company to grow.
- Commit to taking steps that will push your sales results from good to great, even if those steps go beyond known processes.
- Just because current procedures will produce mediocre results does not mean that you should think that's the best you can do – challenge yourself to work the system to improve the outcome.
- Remember that any extra effort you expend will be rewarded several times over.
- Ask customers what else you can do to be of assistance – it conveys your willingness to act on their behalf.
- Understand that by forming an alliance with your customers, they will be more apt to purchase from you.

Success Tactics:

- Increase your daily output incrementally – ramp yourself up to the pace maintained by top producers.
- Encourage your customers to share their opinions – listening is a large part of the advocacy process.
- Familiarize yourself with all the internal resources at your disposal – this way, when a customer issue arises, you can remedy it quickly and effectively.
- Schedule regular feedback sessions with customers so they can offer suggestions and comments – implement these suggestions whenever possible.
- Remember that customer advocacy is more than solving problems – you need to keep in regular contact with customers in order to obtain their feedback.
- Work with a colleague who is a strong customer advocate – take note of what this person does to build an alliance with customers and then implement those tools during your own interactions.

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

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.
- Understand 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.

Proactively Mentors and Supports Others

Derives genuine satisfaction from giving advice, encouragement, and support to others; takes pride in nurturing and developing others; seeks opportunities to share expertise and experience in a mentoring role; is willing to address basic or rudimentary issues necessary to bring a novice up to speed; takes responsibility for motivating others to learn and grow

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> ▪ Loses patience with individuals lacking the motivation or enthusiasm to learn what is being taught ▪ Prefers to offer expertise to those who have mastered the basics and are actively seeking advanced learning ▪ Waits for advice and support to be requested by individuals interested in learning rather than being proactive ▪ Does not want to appear invasive by offering help without invitation ▪ Resists being obligated to function in an advisory capacity 	<ul style="list-style-type: none"> ▪ Serves as a mentor and coach to those needing individual guidance ▪ Derives satisfaction from giving encouragement and support to others ▪ Volunteers advice or assistance to help others achieve job and career success ▪ Adjusts coaching to accommodate novices as well as more experienced individuals ▪ Takes pride in being a role model

Mindset Tips:

- Understand that your role as mentor and teacher is required in order to achieve organizational goals.
- Commit to sharing as much as your knowledge as possible so that others do not need to learn the hard way.
- Realize that although others may not heed your advice, your input is still essential to their success.
- Do not fall into the trap of expecting everyone to be at your level of expertise – everyone learns at a different pace.
- Focus on the impact that your mentoring will have on the future of the company.
- Think about when you were starting out in your field – odds are you had a mentor to help show you the ropes.
- Realize that although you may not like when others solicit advice, not everyone feels the same way.

Success Tactics:

- Actively give advice – your expertise may help in solving difficult problems.
- Make a conscientious effort to share your knowledge with all your co-workers, especially those who are naïve and inexperienced, as they can benefit most from your input.
- Remain focused on the higher goal of bringing less experienced workers up to speed – it will help to prevent you from losing patience.
- Commit to teaching the basics of your field as well as advanced concepts – everyone can benefit from your experience, not just those who learn quickly.
- Strive to see the big picture – sharing your opinions and knowledge can ensure the company's success well into the future.
- Realize that some co-workers will not ask for help, even when they need it – therefore waiting to share knowledge until you are asked will only exacerbate the problem.
- Understand that you need not be intrusive to share knowledge – sometimes a simple word of advice can keep others on the right path.
- Know that although hand-holding can become tedious, it is sometimes the only way to bring others up to speed.

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.



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