

## Competency Development Toolkit

Specialized Technical Sales Benchmark



*Signature Profile*

## Benchmark Profile Description

The Specialized Technical Sales role is tasked with selling a specialized set of products and is not typically bound by territorial constraints. They are product experts who act as resources to the customer to help its personnel do their job more effectively by using the seller's offering. Additional aspects of the role include acting as a liaison with the seller's internal contacts and providing continuous updates associated with market and legislative changes that might impact the customer's needs.

## Predictive Competencies

- Anticipates Obstacles That Could Impede Success
- Identifies and Addresses Customer Needs
- Builds Credibility by Sharing Knowledge
- Maintains and Shares Market Trend Awareness
- Effectively Communicates in an Informal Manner

## Anticipates Obstacles that Could Impede Progress

Able to sort through bureaucracy, complexity or politics to focus on required results; is not caught unprepared when obstacles are encountered; meets self-imposed standards of excellence by delivering agreed upon results that are straightforward and customer-defined

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> <li>▪ Uses own criteria to determine customer requirements</li> <li>▪ May focus more on style and making a good impression than content and relevance in results achievement</li> <li>▪ Can be caught off-guard by unexpected obstacles</li> <li>▪ May revise commitments when faced with unanticipated barriers rather than be on the lookout for problems and prepare to resolve them as they arise</li> <li>▪ May be restricted in effort to satisfy customer requirements by a discomfort with working around the system or taking the more complicated route when met with internal or external barriers</li> <li>▪ May view 'not failing' as an acceptable measure of results achievement</li> </ul>	<ul style="list-style-type: none"> <li>▪ Sets the criteria for ensuring successful results in accordance with customer-defined requirements</li> <li>▪ Delivers the result that was promised to the customer without unnecessary fanfare or embellishments</li> <li>▪ Concentrates on meeting an objective of doing what is best for the customer rather than focus on an effort or result that is meant to favor own appearance or image</li> <li>▪ Finds personal success in meeting customer requirements</li> <li>▪ Realistically anticipates barriers to results accomplishment and is prepared to respond</li> <li>▪ Cuts through administrative or political red tape to maximize results accomplishment</li> <li>▪ Holds results achievement to a high personal standard</li> </ul>

### Mindset Tips:

- Raise the bar on your standards for success – put yourself in the customer's shoes and use their criteria to measure your results and ensure their satisfaction.
- With each new customer, try to improve on the previous challenge's results – for example, if you had difficulty in meeting deadlines last time, focus on improving that area. Continue making improvements until you are delivering exceptional results.
- Anticipate roadblocks that might come up during projects and create contingency plans for eliminating or circumventing them.
- Do not get caught up in bureaucracy or red tape that could prevent you from achieving the desired results – stay focused on your goal and work around administrative issues.
- Don't change the course of the project or veer from the agreed-upon plan unless the customer asks you to change – don't lower your standards because you have run into problems, always use the customer's criteria as the measure of your success.

### Success Tactics:

- Make a list of customer needs and requirements that you can use as a guide to keep you from veering off target.
- Ask questions to ensure that you thoroughly understand your customer's needs and expectations; continuously check and reassess customer needs throughout the course of the project and amend your plans as required.
- Commit to delivering the desired result to the customer – do not include irrelevant features and options in an effort to make a good impression – the results themselves will do that.
- Work with a colleague who effectively cuts through red tape – take note of how this person meets commitments despite obstacles.
- Don't do more than was asked for or change project deliverables – giving customers irrelevant features is not impressive, it makes it appear that you did not understand the criteria of the project.

## Identifies and Addresses Customer Needs

Seeks to provide an appropriate solution by understanding what the customer is trying to accomplish; spends time in a needs analysis process that identifies key objectives specific to an individual customer; gives the customer's agenda priority over a standard response; changes the sales approach or solution to accommodate the customer versus force fit the customer to an existing model

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> <li>▪ Lacks a thorough approach to a customer needs analysis, preferring to move immediately to an existing solution</li> <li>▪ Can be distracted from learning customer requirements by the personalities or politics of a situation</li> <li>▪ Tries to fit the customer's methods or goals into a standard model or solution</li> <li>▪ Takes it as personal criticism when suggestions are challenged</li> <li>▪ Can be too invested in own agenda to comfortably yield to the customer's agenda</li> </ul>	<ul style="list-style-type: none"> <li>▪ Asks questions and studies the customer's key priorities</li> <li>▪ Incorporates the customer's responses and input into a business plan tailored to fit that customer's needs</li> <li>▪ Takes the time to explore options or alternatives for helping the customer to achieve key objectives</li> <li>▪ Accepts the rejection or modification of suggestions in an effort to best understand and help the customer</li> </ul>

### Mindset Tips:

- Do not allow your feelings for customers to distract you from analyzing their needs.
- Remain objective – do not allow rejection of your ideas due to office politics, to decrease the amount of time you take in uncovering the customer's needs.
- Create an agenda for each meeting, making sure that you ask enough questions to ensure that you understand the customer's goals and that your business plan will produce the desired results.
- Look for ways in which you can integrate your products and services to reach customer goals on a case-by-case basis.
- Be flexible in implementing your standard "sales process" and meet customers where they are – don't stick to your standard process when it's not working.
- Be willing to change and customize solutions to meet each customers' unique situation.
- Find out how your organization has customized products and services for other customers and be able to share those examples with customers for whom a standard solution will not work.

### Success Tactics:

- Ask questions to uncover the results each customer is looking for and explore and plan how your products and services will help them achieve those results.
- Analyze your presentations to see if they are too bland or overly detailed – modify them to generate more excitement.
- Keep accurate documentation of each customer's unique needs, expectations, and business strategies and check often to ensure that your plan fits the bill.
- Ask your customers to describe the key points of their ideal solution and tie the features and benefits of your solutions to their stated points.
- When a standard solution will not meet their needs, be sure to offer alternatives along with the pros and cons of each solution.
- Take the time to learn what is important to your customers – study their key priorities so that you can devise an appropriate business plan.

## Builds Credibility by Sharing Knowledge

Builds credibility in a resource role by remaining factual and timely in providing information; maintains sources for quick access to time-sensitive information and to stay abreast of new developments; proactively educates customers or shares information as part of the service they deserve

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> <li>▪ Does not keep others in the loop when delays are encountered in the information gathering process</li> <li>▪ May color information by filtering it through own biases or adding own interpretation</li> <li>▪ Failure to keep information sources up-to-date and readily accessible can result in inaccurate information and unnecessary delays in providing a response</li> <li>▪ Sees information sharing as an added bonus rather than an entitlement and therefore sets the wheels in motion at their own convenience</li> </ul>	<ul style="list-style-type: none"> <li>▪ Takes pride in being a voluntary source of information</li> <li>▪ Presents factual information without embellishment or bias</li> <li>▪ Provides a timely response, even if that response can only confirm that an answer is being sought</li> <li>▪ Keeps the customer informed through status reports if information is delayed</li> <li>▪ Builds a reputation as a credible resource by keeping information sources current and accessible</li> <li>▪ Does not focus on becoming the expert as much as investing resources in knowing how to access and communicate others' expertise</li> </ul>

### Mindset Tips:

- Understand that, in many cases, you are the only resource your customers have for new information - as such, build credibility by offering that information freely and without embellishment.
- Realize that it is your duty to provide information that is backed by fact – commit to following-up with customers to learn what information they found the best and then rely on that source in the future.
- Balance honesty, respect, and confidentiality in all communications with customers – even if the information you are providing a customer is negative, still provide it so that the customer can make an informed decision.

### Success Tactics:

- Use the internet and industry publications to stay current on trends and advancements in your industry and that of your customers so that you can be viewed as a credible resource.
- Identify and read key business books to stay current on general business trends and thinking so your customers can rely on you to inform them of developments quickly.
- Attend industry conferences to get access to experts in your industry and your customer's industries so that you can pass along relevant inside information to your customers.
- Keep your customers informed on key trends and/or that are relevant to their business – offer this information without prompting so that you can show you can anticipate their needs.
- Share relevant articles that might interest your customers, but be sure to include an upfront note pointing out particular areas of interest – backing your information with fact reinforces your credibility.
- Do not flood customers with irrelevant details in an attempt to make yourself look good – customers will rely on salespersons who provide relevant information in an objective manner.
- Ensure that your customers receive regular information on company events and product/solution upgrades and enhancements – demonstrate that you are looking out for their needs.

## Maintains and Shares Market Trend Awareness

Stays in touch with market trends, including environmental and competitive forces influencing the market, so that they are seen as a valuable resource to important constituents internal or external to the organization; constantly seeks information that will be useful but is not readily available to colleagues; enjoys being sought for advice and instruction; spends the time to build a base of knowledge that ultimately helps others to be more effective

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> <li>▪ May believe they can get by on a cursory understanding of market trends and conditions because its added value to others isn't appreciated</li> <li>▪ Comfortable with present knowledge of the market and may believe the incremental gains that could be achieved by developing knowledge base would not justify the time spent</li> <li>▪ Does not increase understanding of market issues for the purpose of sharing that information with others</li> <li>▪ Assumes customers will utilize their own resources to stay on top of changing market conditions</li> </ul>	<ul style="list-style-type: none"> <li>▪ Takes professional pride in maintaining an in-depth awareness of market issues</li> <li>▪ Believes there is a benefit to continually building and adding to own knowledge base in market and competitive issues</li> <li>▪ Wants to be prepared to serve as a source of advice and information to customers</li> <li>▪ Updates own market information in order to be of assistance to customers who may not have the time or resources to research changing market trends themselves</li> </ul>

### Mindset Tips:

- Understand that gaining information so that you can become a trusted and loyal advisor could be the key that differentiates you from your competitors.
- Create an internal networking group to share ideas, trends, and other information – doing so will share the burden of information collecting and give everyone a chance to broaden their knowledge base.
- Go to school on the competition – yours and your customers' – to be prepared to competitively position your organization and that of your constituents.
- Remember that providing both external and internal customers with useful, up-to-date information can help to position you as a valuable resource.

### Success Tactics:

- Arrange your work schedule so that you have a designated time each day to review industry publications – discuss your findings with colleagues so that you can gain different perspectives on the information.
- Ask your colleagues or members of your network to share their best data sources and reciprocate with them so that you can all share on expert and, possibly inside, industry information.
- Brainstorm and write down several questions that might be on the minds of your constituents; use these questions to focus your research to relevant topics.
- Use networking events to interview contacts across industries on trends, challenges, and opportunities – use this knowledge to advise internal and external customers.
- Attend general business and industry conferences to learn about the latest thinking in your industry and beyond so that you can gain knowledge that may not be readily available to your constituents.
- Share relevant information you collect with both internal and external customers and provide analysis of how these trends and events impact them and their business as well as facts to back up your claims and bolster your credibility as an accurate resource.
- Subscribe to on-line publications or data services, such as the Wall Street Journal or Hoovers; these services allow you to quickly gather and analyze data, so that you can pass it along to customers while it is still timely and relevant.

## Effectively Communicates in an Informal Manner

Communicates essential points in an informal and conversational manner; prefers to share information in a one-on-one or small group situation; varies style and language to ensure listener understanding and is attentive to closing the loop on communications; seeks feedback and responds appropriately to listener reactions; makes presentations that are unrehearsed and adapted to individual situations

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none"> <li>▪ May attempt a one-size-fits-all communication style that does not account for different information needs</li> <li>▪ Sticking to a prepared script does not leave any room for customer feedback/reaction or adjustment in the presentation in response to that input</li> <li>▪ Unwilling to risk personal rejection or judgment, they may create an image or persona rather than be natural</li> <li>▪ Keeps the audience at arm's length, making the presentation seem less personal to the customer</li> </ul>	<ul style="list-style-type: none"> <li>▪ Sensitive to the customer's circumstances and response, adjusting the communication of information or ideas to accommodate their need to know or level of understanding</li> <li>▪ Encourages questions, comments, and feedback from the customer</li> <li>▪ Backs an informal presentation with professional tools and company guarantees</li> <li>▪ Gives specific details of how/who/when, promising that the complexity of delivery and servicing of the product line will be shouldered by the seller</li> <li>▪ Keeps the focus on content and substance, not flash and performance</li> <li>▪ Creates a presentation that is informal, low-key, and unrehearsed</li> <li>▪ Talks with the customer, creating a team feeling of working together, versus directing a speech at the customer</li> </ul>

### Mindset Tips:

- Don't rely on a script for your presentation – follow a basic outline but remain flexible so that you can alter the style and content to fit your customers' reactions and priorities.
- Determine presentation agenda and objectives – but be prepared to switch gears in response to audience reaction.
- Make time in your presentation for customer feedback and questions – use this information to ensure that your message is understood.
- Anticipate potential customer concerns, objections, or questions before the meeting and work the answers into your presentation.
- Remember that you have two important goals in a small group presentation – the first is to make your audience feel comfortable and the second is to ensure they understand your message.

### Success Tactics:

- Strive to listen more than you are talking, asking your customer questions to elicit participation and feedback in a conversational manner.
- Devise a checklist of items that need to be covered, but remain flexible so that you can change course should your audience appear confused or disinterested.
- Don't hide behind fancy, high-tech presentations – set the customer at ease by taking a more personal approach.
- Find a colleague who can help you practice giving presentations in a more low-key, informal manner - have this colleague role play as a variety of different customer types you may encounter.
- Adopt a more conversational style – don't speak at customers, speak with them.
- Be flexible and go where the customer wants to take you – even if it means veering from your established agenda.
- If using support materials, work from prepared handouts to create a more informal environment – analyze your presentation to see what other changes could be made to make it more personal.



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