



# SALES MANAGEMENT **WORKSHEET**

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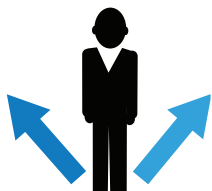


An important aspect of sales management is making sure that all sales managers are measuring the same thing. To accomplish this, standards need to be written down and agreed upon by everyone in the organization. This takes effort and collaboration in the beginning but once it's done, sales coaching and feedback become easier and more effective.

Each sales person should be measured by the same standards so that the sales management and feedback is consistent and fair. As a sales manager, you need to be able to describe what a behaviour looks like when:

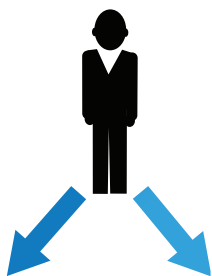
- It is being performed well (meets expectations).
- It is not being performed well (below expectations).

For example, if you were measuring someone's ability to build rapport, the ratings might go something like this:



### MEETS **EXPECTATIONS**

- Establishes commonality before leading into the sales discussion.
- Maintains eye contact.
- Considers the prospect's personality and style.
- Is conscious of prospect's attitude changes and responds properly.
- Reads customer's body language and asks questions to determine probable objections.



### BELOW **EXPECTATIONS**

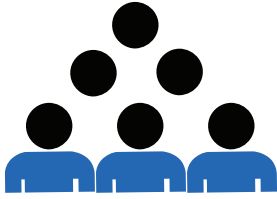
- Does not modify their approach and behaviour with customers to improve rapport.
- Does not maintain eye contact.
- Misses verbal and non-verbal cues.
- Voice is monotone.



This checklist is to provide you and your sales people documented feedback on their performance in a sales call. The purpose is to document what the sales person is doing well and what they need to improve.

Take the time to review each activity and rate the degree to which your sales person performs relative to where they need to be to ensure success. The goal is to identify 5 or 6 areas for improvement and work with the sales person on those areas over a three to six month period, depending on the level of time you can commit to coaching. After the coaching period, go on another sales call and use the checklist again to see if they are on track or need more coaching.

TACTICAL SELLING SKILLS	DO WELL	COULD BE BETTER	NEED TO BE BETTER	NEED HELP
Prospecting for new business				
Cold calling				
Making appointments				
Pre-call preparation				
Establishing rapport with the prospect				
Gaining the prospect's interest				
Differentiating your company from the competition				
Understanding the buying/selling process				
Understanding the impact of personality on the sales				
Ability to adjust to the prospect's personality				
Understanding the prospect's needs before selling				
Listening skills				
Qualifying the prospect before selling				
Making persuasive sales presentations				
Demonstrating Benefits				
Creating the desire to buy				
Handling common objections				
Handling put-offs				
Uncovering false objections				
Dealing with the price objection				
Dealing with price shoppers and hagglers				
Handle rejection				
Maintain personal enthusiasm				
Recognize non-verbal buying signals				
Using trial closes				
Closing the sale (asking for the business)				
Partnering with the prospect/client				
Using the telephone as an effective selling tool				
Providing strong after-sales follow-up and support				
Getting enough referral business				
Getting more business from existing accounts				



## DEVELOPING BEHAVIOURAL PERFORMANCE STANDARDS

Now let's look at the type of specific behaviours that indicate what the performance objectives look like when they are classified as 'meeting expectations'. Here are a few examples of behavioural descriptors used for the list on the previous page. You can use your own behaviour characteristics in place of the ones below as needed.

OBJECTIVE	BEHAVIOURS THAT MEET <b>EXPECTATIONS</b>
<b>Prospecting for New Business</b>	<ul style="list-style-type: none"> <li>• Use multiple sources to locate prospects.</li> <li>• Creates a prospecting plan.</li> <li>• Develops a prospecting pipeline.</li> <li>• Keeps complete prospect records.</li> <li>• Asks for referrals.</li> </ul>
<b>Pre-Call Preparation</b>	<ul style="list-style-type: none"> <li>• Understands customer's business.</li> <li>• Sets call objectives.</li> <li>• Sets sales call agenda.</li> <li>• Has overall account strategy.</li> </ul>
<b>Gain the Prospect's Interest</b>	<ul style="list-style-type: none"> <li>• Got customer's attention.</li> <li>• Established rapport.</li> <li>• Set appropriate business tone.</li> <li>• Kept the sale moving along.</li> </ul>
<b>Understand the Prospect's needs before Selling</b>	<ul style="list-style-type: none"> <li>• Gained interest.</li> <li>• Used open-ended questions.</li> <li>• Encouraged customer to talk.</li> <li>• Used questions to develop needs.</li> <li>• Listened to the customer's responses.</li> <li>• Used customer's responses to develop needs.</li> <li>• Developed needs that we can satisfy.</li> <li>• Determined who the decision makers are.</li> <li>• Determined timing of final decision.</li> <li>• Determined financial limits and/or restraints.</li> <li>• Uncovered competitive situation.</li> </ul>
<b>Making Persuasive Sales Presentations</b>	<ul style="list-style-type: none"> <li>• Linked features and benefits to stated needs.</li> <li>• Knew at least 3 appropriate facts and benefits.</li> <li>• Used sales tools.</li> <li>• Used appropriate evidence.</li> <li>• Was aware of buying signals.</li> </ul>
<b>Demonstrate Benefits</b>	<ul style="list-style-type: none"> <li>• Knew how to demonstrate the product/service.</li> <li>• Demonstration was applicable to the sale.</li> <li>• Got and kept the customer involved.</li> </ul>

OBJECTIVE	BEHAVIOURS THAT MEET <b>EXPECTATIONS</b>
<p><b>Handling Common Objections</b></p>	<ul style="list-style-type: none"> <li>• Acknowledges the prospect’s objection.</li> <li>• Encourages the prospect to discuss their objections.</li> <li>• Responds with appropriate information to prospect’s objections.</li> <li>• Did not become defensive while handling the objection.</li> <li>• Addressed each of the prospect’s concerns appropriately.</li> </ul>
<p><b>Closing the Sale</b></p>	<ul style="list-style-type: none"> <li>• Recognizes the prospect’s verbal buying signals.</li> <li>• Uses a trial close at the appropriate time to determine if the prospect is ready to buy.</li> <li>• Asks for the business at the appropriate time.</li> </ul>

SKILLS	BEHAVIOURS THAT MEET <b>EXPECTATIONS</b>
<p><b>Oral Communication</b></p>	<ul style="list-style-type: none"> <li>• Speaks clearly.</li> <li>• Maintains eye contact.</li> <li>• Used pause effectively to allow the prospect the opportunity to ask questions and make comments.</li> <li>• Summarizes points of agreement during the discussion.</li> <li>• Recognizes signals in voice tone and manner.</li> <li>• Asked questions which got the prospect to evaluate or analyze their current business requirements.</li> <li>• Presents ideas in a logical sequence that listeners can follow.</li> </ul>
<p><b>Time Management</b></p>	<ul style="list-style-type: none"> <li>• Identifies business priorities and establishes time focused objectives which support these priorities.</li> <li>• Determines and prioritizes daily tasks.</li> <li>• Arrives for appointments on time and ends call on time.</li> <li>• Completes tasks and commitments on time.</li> </ul>
<p><b>Listening Skills</b></p>	<ul style="list-style-type: none"> <li>• Listens without interrupting the speaker.</li> <li>• Takes notes.</li> <li>• Refers to points previously made by the speaker.</li> <li>• Feeds back their understanding of what the speaker said.</li> </ul>
<p><b>Ability to Adjust to the Prospect’s Personality</b></p>	<ul style="list-style-type: none"> <li>• Identifies and matches the prospects buying style.</li> <li>• Builds rapport using two discernable techniques.</li> <li>• Identifies prospect’s personality style and modifies own behaviour.</li> <li>• Puts the prospect at ease by modifying their communication style.</li> </ul>

## COMPLETED **EXAMPLES**

To complete the exercise, add the behavioural descriptors that outline when a performance objective is not being met, or is below expectations. Below are several completed examples.

### Has clearly defined call objectives and is well planned for calls

MEETS EXPECTATIONS	BELOW EXPECTATIONS
<ul style="list-style-type: none"> <li>• Reviews prospect's file and determines call objectives.</li> <li>• Consistently develops appropriate plans for each account.</li> <li>• Can identify the status of all accounts.</li> <li>• Develops a call itinerary.</li> <li>• Documents call summary in prospect's file.</li> </ul>	<ul style="list-style-type: none"> <li>• Goes into the call unprepared.</li> <li>• Call priorities are unclear.</li> <li>• Does not enter complete call data in prospect's file.</li> <li>• Often has to ask the prospect for information that should be known.</li> </ul>

### Assesses Prospect's Needs

MEETS EXPECTATIONS	BELOW EXPECTATIONS
<ul style="list-style-type: none"> <li>• Focuses on the prospect's needs and problems, not on our products.</li> <li>• Asks pertinent, probing, open-ended questions to gain information.</li> <li>• Anticipates prospect's needs and explores all options to exceed them.</li> <li>• Has an appropriate response to prospect's questions.</li> <li>• Accurately identifies prospect's needs through active listening.</li> </ul>	<ul style="list-style-type: none"> <li>• Prejudges prospect's needs and assumes their requirements.</li> <li>• Asks insufficient questions for full understanding of prospect's needs.</li> <li>• Does not listen carefully.</li> <li>• Begins selling to the prospect before assessing their needs..</li> </ul>

### Handle Prospect's Objections

MEETS EXPECTATIONS	BELOW EXPECTATIONS
<ul style="list-style-type: none"> <li>• Hears the objection and uses an acknowledgement.</li> <li>• Clarifies the objection by restating it back.</li> <li>• Consistently responds appropriately when an objection is a misunderstanding, skepticism or a drawback.</li> <li>• Applies business and product knowledge in handling objections.</li> <li>• Follows up by asking if the objection has been successfully countered.</li> <li>• Accurately identifies prospect's needs through active listening.</li> </ul>	<ul style="list-style-type: none"> <li>• Becomes defensive when a prospect won't let go of their point of view.</li> <li>• Does not wait to fully hear what the prospect is saying before replying.</li> <li>• Does not acknowledge the objection.</li> <li>• Does not ask questions to seek clarification.</li> <li>• Opposes the prospect's suggestions in favour of their own.</li> <li>• Does not ask to see if the objection was successfully countered.</li> </ul>

**Provide Consultative Solutions**

MEETS EXPECTATIONS	BELOW EXPECTATIONS
<ul style="list-style-type: none"> <li>• Understands each of the prospect’s objectives.</li> <li>• Helps prospect achieve their business objectives.</li> <li>• Regularly makes realistic short term and long term commitments and ensures they are met.</li> <li>• States the benefits when providing features.</li> <li>• Provides solutions that are clearly win-win for the prospect and our company prospect’s questions.</li> </ul>	<ul style="list-style-type: none"> <li>• Fails to negotiate the best solution for the prospect.</li> <li>• Rarely states the features and benefits to gain agreement.</li> <li>• Misses small details that could be probed further.</li> <li>• Only states features and not the benefits.</li> </ul>

**Communicates Effectively**

MEETS EXPECTATIONS	BELOW EXPECTATIONS
<ul style="list-style-type: none"> <li>• Expresses themselves clearly.</li> <li>• Listens without interrupting.</li> <li>• Doesn’t use company jargon when speaking with the client.</li> <li>• Asks superior questions through all the stages of the sales cycle.</li> <li>• Consistently conducts presentations that are dynamic, informative and succinct..</li> </ul>	<ul style="list-style-type: none"> <li>• Becomes defensive when someone opposes their opinion.</li> <li>• Takes too long to deliver a message.</li> <li>• Cuts people off before they are through speaking.</li> <li>• Uses slang when speaking with clients.</li> </ul>

By using this worksheet as a guide, you will be well on your way to better sales management, coaching and communication with your sales people. By doing this on a regular basis, you will identify areas for improvement and reduce the turnover by correcting the behaviors before they become a problem.

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