Sales Professional Capability Assessment & Development Planning

Before

- *No agreed competency profiles existed for the team*
- *Total of 430 "Needs Development" ratings were received from team*

After

- *Three sales competency profiles were developed for the three key sales roles*
- *Four customised and targeted training modules were developed*

Impact

- *72% reduction in the number of "Needs Development" ratings in the next cycle of assessment*
- *21% average increase in the number of qualified leads in the sales pipeline*

THE BUSINESS CHALLENGE

Most sales organisations have a sound range of generic sales and product training solutions to train and educate their sales people and help them to understand the skills, knowledge, habits and behaviours that are required to effectively sell their offerings within their industry and target segments.

In contrast, relatively few sales organisations have the ability to:

- Identify to what extent their sales people have been able to internalise the sales and product training that they have received and have incorporated it effectively in to the way that they sell.
- Identify and prioritise the residual training needs of their sales team in order to build the team-wide and personal development plans that will optimise team performance.
- Calculate the R.O.I. of the sales team training that they have invested in, particularly where external providers are used, in order to make informed "stop or continue" decisions.
- Build a statistically validated competency profile that highlights the key skills, knowledge and capabilities that differentiate their top performing sales people from the rest of the sales team, which can then be used as a benchmark for a range of important activities including recruitment and selection, succession planning, personal development planning etc..

THE APPROACH

The design and development of an integrated learning and development management system for a sales team involves a number of critical steps.

Firstly, you need to develop a detailed competency profile for each of the key sales roles within the organisation that the individual sales people's current capabilities can be assessed against. This will need to include descriptions of all the critical skills and knowledge required for the role. We find it useful to organise and define the competency profile around the following eight categories:

Typically each of these eight competency categories will be made up of 5-10 specific skills, knowledge, or capabilities, so that a completed competency profile will comprise 50-60 separate competences for each sales role. We have a generic B2B competency profile that we customise with each client to ensure that it is relevant and complete.

To ensure the reliability and realism in the competency assessments that are completed, we encourage our clients to have both the sales professional and also their manager complete the assessment. This provides the opportunity to highlight any unrealistic assessments caused by “unconscious incompetence”, so that they can be discussed and resolved.

We have found that using a simple three point scale for the assessment is the most effective way to highlight the individual’s and team’s major development needs:

- Needs Development
- Meets Expectation
- Exceeds Expectation

The results of all completed assessments are consolidated and analysed to specifically identify three things:

1. Where individual sales professionals have development needs despite having already attended the standard training on offer within the business, so that they can either re-attend or receive targeted coaching
2. Where there are team-wide development needs that can be addressed through a whole-of-team arrangement
3. Individual specific development needs where there is not a standard training offer and peer or sales manager coaching is the appropriate remedy.

THE FINDINGS

Most of our clients find that there are typically only a small number of development needs that are common to all team members and so are able to avoid the waste and frustration caused by “sheep dipping” the whole team in a standard sales training offering that offers little value.

One of our clients was aware that their sales team were struggling to generate sufficient high quality leads. After completing the assessment, they were able to design a prospecting and lead generation training module that specifically focused in on the 6 aspects of this activity that the team most wanted development in. They were also able to address the less common development needs through one-on-one coaching of the relevant sales professionals.

#	Area	Prospecting & Opportunity Identification - BDM's & AM's	BD Count
1	Find More	Dedicates regular times during their week to make prospecting and cold calls in order to explore opportunities, qualify them and maintain a regular supply of qualified prospects to meet	**18**
2	Find More	Establishes appropriate monthly and weekly call plans to optimise coverage of the prioritised opportunities and minimise excessive travel times within their territory	**17**
8	Find More	Regularly and formally reviews all of the companies and accounts within their territory in order to identify those that should be targeted, both existing customers and new prospects	**13**
12	Find More	Creates, maintains and periodically reviews a territory coverage plan/business plan that ensures all potential opportunities are called upon to determine if they have a need for any of our products or services, both existing customers and prospects	**13**
15	Find More	Able to identify high quality and relevant sales opportunities by effectively leveraging their network and always asking prospects and customers for referrals to any one elsewho could be interested in their products, services and solutions	**11**
22	Find More	Effectively qualifies and prioritises the potential sales opportunities that they find in their territory to reflect the prospect's 'likelihood of buying' and the potential value of the opportunity	**9**
23	Find More	Demonstrates a well developed knowledge of the marketplace in the way that they monitor the accounts within their assigned territory in order to understand when these trigger events occur	**2**
24	Find More	Understands which of the different sources of sales opportunities provides them with the best opportunities and actively prioritises and develops these. For example, knows which of their introducers understand our products and services best and generate the best leads	**2**

Figure: Consolidated Training Needs Count For The “Find More” Capability Area

THE BUSINESS IMPACT

There is clearly a lot of work involved in developing a customised competency profile for each of your sales roles when this process is first implemented. However, the benefits of knowing exactly where your sales people are looking for development and support, so that you can optimise your spend on formal training and optimise the focus of your sales manager coaching provide a significant return on this effort.

In the example above, the organisation was able to address and meet 72% of the prioritised “Needs Development” assessments, with the design and delivery of just four customised training and best practice sessions.

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