

Objective Management Group, Inc.



The Dave Kurlan Sales Force Profile™

Sales Manager's Self Assessment

Mary Smith
Sample Corporation

(10-Jul-2007)



**Objective
Management
Group, Inc.**

THE DAVE KURLAN SALES FORCE PROFILE™

Thanks for completing and returning your self-assessment folio. Before you read your completed personal evaluation, I'd like to explain a few of its concepts.

First, I'd like you to remember the spirit in which this evaluation was intended. Its primary purpose is to give you additional insights with which to increase sales through your salespeople; a benefit designed to increase earnings for you and your company. This is not in any way intended to be negative or critical.

Second, this isn't a psychological assessment or a personality profile; therefore it shouldn't in any way be read as a critique of you as an individual. It should only be seen as a microscopic view of how you think and function in ways that affect your success as a sales manager and salesperson. That may help you to understand any possible disagreements you may have with certain portions of my commentary, which are based entirely on sales values and more than 30 years of successful sales, sales management and sales training experience. While it isn't my intent to challenge your personal value system, acceptable sales values and performance may differ significantly from your personal beliefs and expectations.

It would be very easy to produce and deliver a sugar coated, "boy, are you incredible!" type of review, boosting your ego and ultimately failing to cause meaningful changes. The alternative is to shoot straight, make you aware of weaknesses of which you and most other sales managers aren't aware and risk hurting your feelings, bursting your bubble and increasing your blood pressure. That doesn't sound very appealing but that's the route I have chosen to take none the less. **IT MAY STING FOR A LITTLE WHILE BUT IF IT CAUSES YOU TO MAKE SOME CHANGES WHICH INCREASE SALES, PROFITS AND EARNINGS, IT'S WORTH IT!**

Most sales managers want to know who they are being compared to when strengths and weaknesses are indicated. In this evaluation, you are being compared to the ideal sales manager. While a comparison to Joe or Mary Average would show you in a more favorable light, it would only serve to encourage mediocrity.

Most sales managers wonder why there were sales questions included in a sales management evaluation. Our reasoning is that while you may possess the proper framework for effective coaching, we must also be able to determine whether the content of your coaching is appropriate for improving sales performance.

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Confidential Evaluation for Mary Smith

Most sales managers usually find a few things with which they strongly disagree upon reading their evaluation for the first time and I'm sure the same will be true with you. However, once they've had time to let the information sink in they come to not only agree with our findings but embrace them!

Finally, don't take anything personally, it isn't meant that way. Any weaknesses described on the following pages are sales and sales management related weaknesses only, not character flaws. The changes I've suggested are designed to help you manage and coach your salespeople more effectively, and as a result, get them to shorten the selling process, sell more, and sell more often. Thanks again for your participation and good luck in your pursuit of sales management excellence!

SUMMARY

Dear Mary,

I am very pleased with your strong desire and commitment. This will make it very easy to make the changes suggested on the following pages.

For further improvement, I believe that it would help a lot if you could be more effective at coaching salespeople, learn and implement a much more powerful and consistent selling system and completely rewrite and reprogram your collection of sales management self-limiting records.

You will see a tremendous increase in your sales management effectiveness by making these changes.

Good Luck,

A handwritten signature in cursive script that reads "Dave".

Dave Kurlan

SUMMARY OF FINDINGS

Four crucial elements for success – Desire, Commitment, Outlook and Responsibility - are the most important elements we look at. We are able to determine incentive for change, growth potential and even whether an individual is trainable, just from looking at this combination of elements. We have also identified five major weaknesses which, when present in certain combinations, will neutralize all of an individual’s strengths and skills, causing a sales paralysis of sorts. In the chart below, we have indicated whether those crucial elements are strengths or weaknesses, and whether any of the five major weaknesses are factors for you.

	Strength	Weakness
Crucial Elements		
Desire for success in sales management	✓	
Commitment to success in sales management	✓	
Responsibility	✓	
Outlook	✓	
Major Weaknesses		
Controls Emotions	✓	
Record Collection		✓
Buy Cycle		✓
Money Issues	✓	
Need For Approval	✓	
• From Prospects	✓	
• From Salespeople	✓	
Other Findings		
Management Growth Potential		92
Sales Growth Potential		71
Total Growth Potential		163

Confidential Evaluation for Mary Smith

SPECIAL SKILL SETS DETAIL			
The information in this section indicates your attributes for several skill sets. For additional explanation of skill sets go to http://www.objectivemanagement.com/references/index.htm			
The Performance Master	Present	The Recruiter	Present
Doesn't Accept Mediocrity	✓	Upgrades the Sales Force	✓
No Need For Approval From Salespeople	✓	Uses Correct Hiring Criteria	✓
Takes Responsibility	✓	Hires the Best Person for the Position	
Manages Behavior	✓	No Need for Approval from Salespeople	✓
Asks Questions		Good Bonding and Rapport	
Manages Pipeline	✓	Good Interviewing Skills	
Record Collection Supports Accountability	✓	Recruits Consistently	✓
% of Traits	71%	Good Decision Maker	
The Coach		Record Collection Supports Recruiting	
Debriefs Effectively		% of Traits	44%
Handles Joint Sales Calls Effectively		The Motivator	
Asks Questions		Has Goals and a Plan	✓
No Need for Approval from Salespeople	✓	Knows What Motivates Salespeople	✓
Controls Emotions	✓	Gives Recognition	
Doesn't Rescue the Salespeople		Strong Self Image	✓
Has a Selling System		Good Bonding and Rapport	
Knows Why People Buy	✓	Runs Effective Sales Meetings	✓
Knows How People Buy	✓	Doesn't Accept Mediocrity	
Effective at Getting Commitments	✓	Takes Responsibility	✓
Consistently Coaches and Debriefs		Record Collection Supports Motivation	
Record Collection Supports Coaching		% of Traits	56%
% of Traits	42%		
The Mentor			
Strong Self Image	✓		
Effective When Asking Questions			
Effective at Handling People	✓		
Effective at Listening	✓		
Doesn't Accept Mediocrity			
Takes Responsibility	✓		
Flexible Thinker	✓		
Record Collection Supports Growing People			
% of Traits	62%		

COMPARISON OF MANAGEMENT PRIORITIES

In the table below, we have compared your management priorities with those of the company. These comparisons are based upon your answers to the 17 Management Priority Questions. No action is required where your priorities are the same as the priorities for the company. However, where your priorities are different, it is important for you to discuss those differences and determine whether you are, in fact, correct in your choice of priorities.

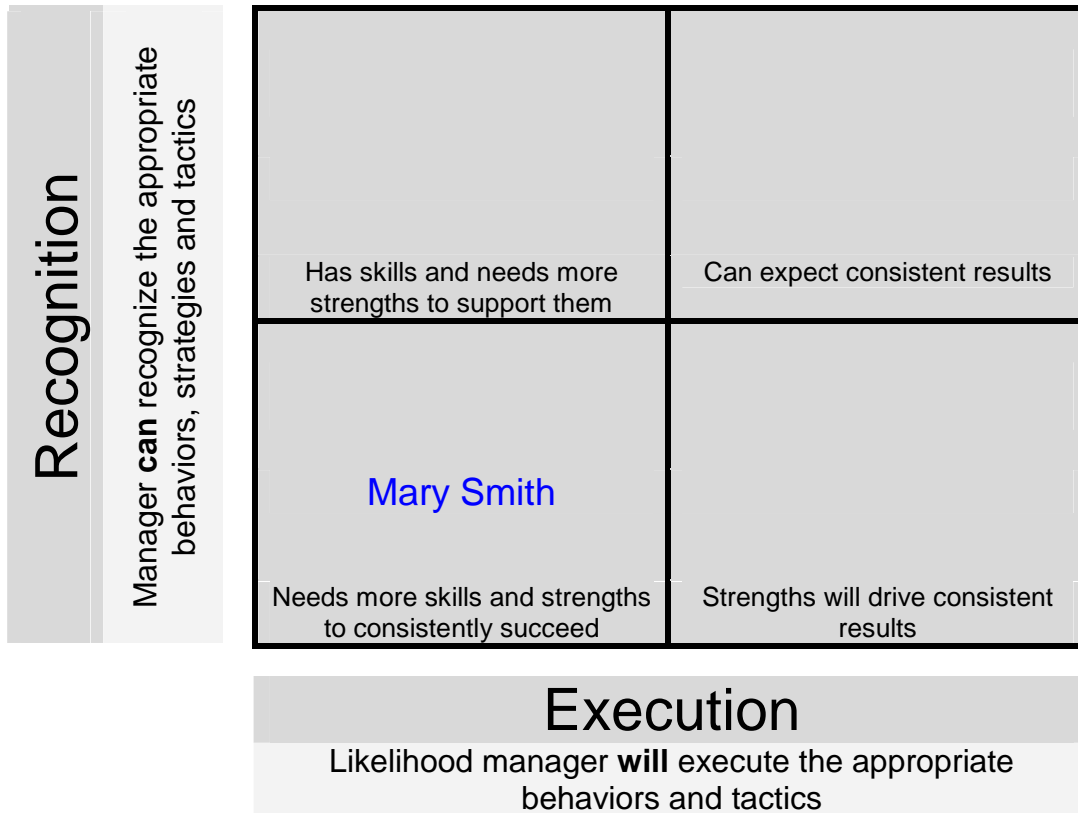
Management Priorities (Priorities Compared With Those of the Organization)		
Business Area	Your Priority	Organization's Priority
Basis of Accounts	Profit	Profit
Profile of Potential Customer	Credit Worthiness	Credit Worthiness
Business Plan	Pursue Opportunities Whenever They Appear	Pursue Opportunities Whenever They Appear
Sales Manager's Role	<i>Manager Who Develops Salespeople</i>	Manager That Maintain Personal Sales
Recruiting Strategy	Hire "A" Players	Hire "A" Players
Training	Use Outside Professionals	Use Outside Professionals
Compensation	Salary Plus Commission	Salary Plus Commission
Developing Salespeople	<i>Replace All The Non-Performers</i>	Develop The Existing People
Sales Force Automation	Plan Future Installation	Plan Future Installation
Market Strategy	Expand It	Expand It
Trade Shows	Participate In Targeted Shows	Participate In Targeted Shows
Role of Marketing	<i>Create Leads</i>	Generate Sales
Reaching Customers/Clients	Create New Channels	Create New Channels
Market Identity	<i>Quality</i>	Service
Growth	Find New Business	Find New Business
Competition	Hold Firm On Our Price	Hold Firm On Our Price
Internet Strategy	Use It To Complement The Business	Use It To Complement The Business

COMPARISON OF TIME PRIORITIES

In the following table we compare the percentage of time you spend on various management activities to the ideal percentage of time as recommended by us. Carefully review those activities where your allocation differs significantly from the recommendation. Determine whether there is valid justification for the difference and make the appropriate changes to the schedule for managing your salespeople.

Management Time Priorities		
Area of Activity	Your Time %	Ideal Time %
Coaching Salespeople	<i>15</i>	25
Motivating Salespeople	<i>10</i>	25
Measuring Performance / Accountability	<i>5</i>	25
Recruiting	5	5
Crisis Management	5	5
Internal Company Issues	5	5
Planning / Managing Compensation	<i>2</i>	1
Organization / Reorganization	<i>5</i>	1
Business / Product Strategy	<i>5</i>	3
Direct Selling	<i>43</i>	5
<p>Your time percentages are shown in red italics when they are significantly different than the ideal percentage.</p> <p>If you have a direct selling goal and/or you have significant staffing requirements, then your direct selling time and recruiting time may be significantly higher than the ideal.</p> <p>The first four areas of activity are essential to growing your sales force and impacting results. You indicated that you spend less than 50% of your time on these activities. We believe this is insufficient emphasis for effective sales management.</p>		

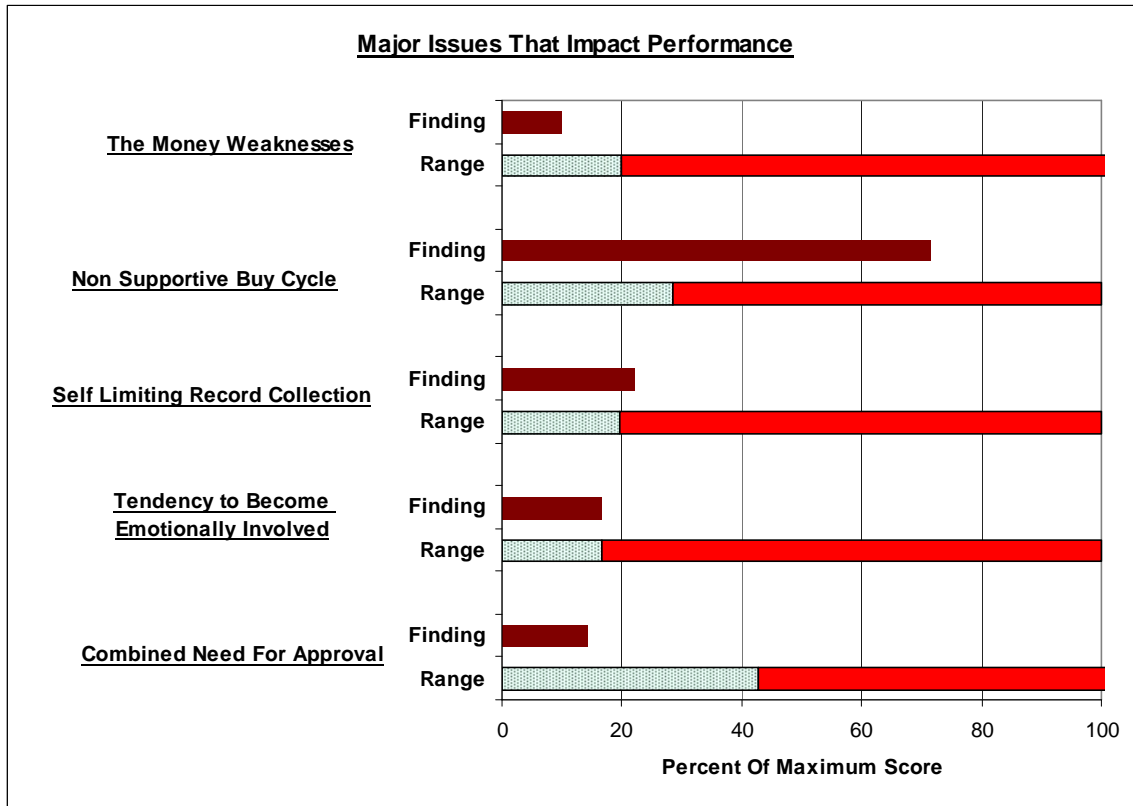
CURRENT ABILITY TO ACHIEVE CONSISTENT RESULTS



We assessed your strengths and skills and placed your name in the quadrant of the diagram above that best illustrates your current ability to achieve consistent sales results. Skills help you choose the correct strategy while strengths help you execute that strategy. The more strengths and skills you possess, the more consistently you will perform. Sales managers in the upper right quadrant are capable of the greatest consistency while sales managers in the lower left quadrant tend to be the least consistent performers. The number of skills we identified suggests that you might not always be aware of the most appropriate strategy.

Combined Analysis Of:	Percentage Identified
Skills	31%
Strengths	60%
Weaknesses	39%
Likely Problems/Challenges	56%
Management Skills	50%
Management Challenges	56%

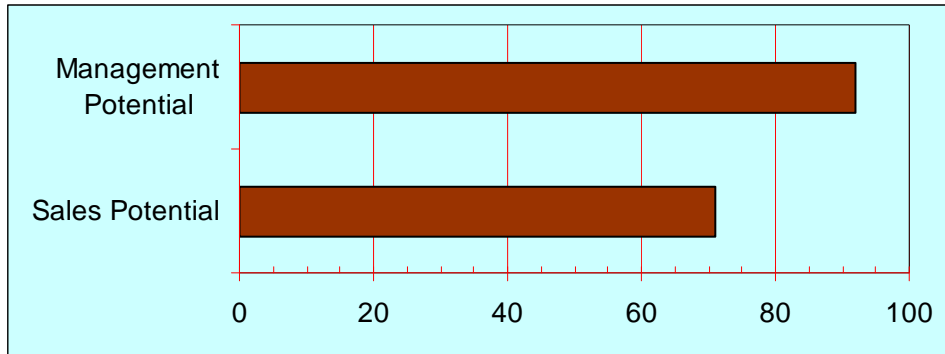
Severity of Five Major Weaknesses for Mary Smith



Each of the five issues that can become major weaknesses is shown in the graph above. When the bar representing the finding extends over the green range the issue does not have a negative impact. When the finding bar extends over the red range, the issue becomes a major weakness. The further the finding extends over the red range, the greater its negative impact on selling. (When printing or viewing in non-color mode the finding bars appear black, the left side of the range appears light-gray and the right side appears dark-gray.)

Our findings indicate that Buy Cycle and Self Limiting Record Collection are considered weaknesses that impact performance. The findings also indicate that The Money Weaknesses, The Tendency to Become Emotionally Involved and The Need for Approval are not severe enough to impact your sales performance.

Growth Potential for Mary Smith



Understanding the Growth Potential Chart

Potential for Growth is a measure of your incentive (Desire, Commitment, Outlook) to change factored by the magnitude (number of major weaknesses) of change required. For example, strong incentive combined with a significant magnitude produces greater potential for growth. Smaller magnitude and/or less incentive produce less potential for growth. On some occasions, an unusually strong person could have very little potential for growth – in other words – we don't feel the individual could become much stronger. Potential for Growth is not a measure of competence and you are capable of changing it as your incentive to change increases or decreases.

Your current growth potential in sales measures approximately 71% and your sales management growth potential measures 92% for a total current growth potential of 163%. This means that you currently have the potential to be 163% more effective at generating business after you overcome your weaknesses and develop the complementary sales and sales management skills.

FINDINGS OF STRENGTHS AND WEAKNESSES

Below, you will find, grouped by strengths and weakness, a detailed description of our findings. The findings include detailed explanations for each strength and weakness, examples of how they apply and some direction on how to overcome any weaknesses we found. A summary of these findings and the core competency from which they are derived can be found on the pages following the details.

YOUR STRENGTHS THAT SUPPORT THE SALES AND SALES MANAGEMENT PROCESS

It seems like you have goals, except for the fact that there aren't any dates involved. My concern is that the goals don't become real goals until the dates have been set. Without deadlines things just don't happen in as timely a fashion as we'd like. As a result expectations are lowered and outcomes aren't as good as we had hoped. In addition, there isn't real accountability without a date. Set a deadline to have your dates set.

Congratulations. You have a legitimate tracking system! When used effectively you should be able to avoid bad months and quarters because of your ability to see them coming well in advance. Continue to utilize and improve your tracking system and you will consistently reach all of your goals.

You have a very strong, positive outlook. This can give you the strength to take full responsibility for your results, even if you aren't doing so presently. A strong outlook has a favorable impact on self-esteem, strengthens bravery and supports a positive record collection. Since outlook is one of the crucial elements for success, you should do everything in your power to keep it strong.

Your strong self-image is a vital attribute in sales management. It will help you to make the changes I have suggested on these pages because you already know yourself fairly well, you're comfortable with who you are and you strive for self-improvement. Your strong self-worth also helps to make you rejection proof if you aren't already, enhancing bravery while supporting techniques that have a positive impact on results.

Your ability to act instinctively under pressure, rather than reactively, is a tremendous strength. Your proven ability to stay calm and relaxed means that you have a better chance of actually listening to your prospect and responding in a way that enhances your position. Continue to trust in your ability to act and respond, remain in the moment and you'll maintain control of the most difficult situations.

Confidential Evaluation for Mary Smith

You don't have a tremendous need to be liked but you do have some. It probably won't get in your way frequently but it may hinder your performance at times. You'll find that your slight need for approval is most often the uninvited guest at closing time. Your prospect wants to think things over and you want to get the deal closed. At the same time you don't want him to stop liking you so you accept the stall. Sound at all familiar? Overcome your remaining need for approval by attempting to get your prospects to respect you instead of needing your prospects to like you.

You seem to be able to handle rejection quite well. This is a desirable strength and it is often accompanied by a strong self-image, a positive outlook and fairly good bravery. When these elements combine as strengths they support and empower your use of effective techniques. This strength is very supportive to and necessary for effective prospecting and closing.

You seem to have a fairly good concept of how much money is "a lot." This should help you coach salespeople who come to you with prospects who think your company is asking "too much" money for what you are selling. Since it won't seem like "too much" to you, attempts to change their perception will be supported by this empowering record.

Since you shop for value you will sometimes pay more in order to get more. Therefore, you will be less vulnerable to the prospect that is looking for the lowest price. Shopping for good value is preferable to looking for the lowest price, but not quite as good as when price doesn't matter at all. This supportive record will also help you coach salespeople that have accepted a stall from a price shopper. Attempt to further improve this behavior until you and your salespeople no longer understand why a prospect would want a lower price. If your salespeople empathize with the prospect they will lose either profit margin or the business.

If sales management success hasn't already come your way, your strong desire assures that it soon will. Strong desire, the most important element in sales and sales management, will provide you with the incentive to make the suggested changes, even when it's difficult or uncomfortable. Keep it up. Continue to raise the bar and set new goals for yourself.

Your strong commitment to personal success in sales management is something to be proud of. Maintaining this level of commitment will give you the incentive to make the changes suggested on these pages. Even with commitment like yours, it sometimes becomes easy to forget the "no matter what" part of "I'll do whatever it takes." Recommit on a daily basis and you'll find yourself performing even more of those things which are good, yet difficult for you to do.

Confidential Evaluation for Mary Smith

SUMMARY OF STRENGTHS SUPPORTING THE SALES AND SALES MANAGEMENT PROCESS		
Findings	Core Competency	Notes
Has Written Goals But Needs To Set a Date	1	
A Good Outlook	3	
Takes Responsibility for any Lack of Results	4	
Good Self Image	5	
Seldom Loses Control of Emotions	7	
Slight Need For Approval From Prospects	8	
No Need For Approval From Salespeople	8	
Rejection Proof	9	
High Money Tolerance	11	
Capable of Upholding Margins	11	
A Strong Desire	20	
A Strong Commitment	21	

Note: You will find a list of Core Competencies at the end of this assessment.

THESE ARE THE SELLING SKILLS YOU POSSESS

It seems that you've become comfortable asking questions, something that very few sales managers ever accomplish. Good questions help you control, and when used effectively, shorten the selling process. Continue to ask good questions and incorporate the suggestions from this evaluation into your questioning strategy.

You get your prospects to tell you why they would buy from you instead of from your competitors. As a result, you are less likely to give them your reasons to buy. In addition you are more likely to address their concerns in any proposals or presentations you might make. Keep up the good work.

It appears that you don't do much assuming on your sales calls and this is wonderful! I hope that you are also asking questions that get your prospects to tell you what you need to know. Continue to practice this approach and you will save a lot of time, prevent mistakes and maintain control of the selling process.

It appears that you've been getting your prospects to tell you exactly how they would reach a decision to buy from you. This is so much better than telling them how to do it, or worse, leaving that important detail to chance. You should be congratulated, as this is a seldom practiced, misunderstood strategy which, when exercised, gives you a tremendous advantage over your competition.

You get your prospects to agree, in advance, to make a decision. When accompanied by supportive decision-making records, your closing opportunities will usually result in decisions rather than "think it over" and you'll shorten the sell cycle as well. Continue this strategy and if you incorporate my other suggestions you'll have even more control of your destiny.

Confidential Evaluation for Mary Smith

SUMMARY OF SELLING SKILLS		
Findings	Core Competency	Notes
Won't Make Many Assumptions	14	
Effective Handling People	15	
Asks Prospects Why They Would Buy	17	
Asks How Prospects Will Make Buying Decision	19	
Gets Prospects to Make Decisions	19	

Note: You will find a list of Core Competencies at the end of this assessment.

THESE ARE THE SALES MANAGEMENT SKILLS YOU POSSESS

It seems that you've learned to manage your pipeline in a very effective way. Continue this practice in order to predict the amount of business that your sales force produces in the future. You must be sure that there is enough business in your pipeline to reach your monthly goals. Let's say that you have a June goal of \$200,000, a 30% closing percentage and a four-month sell cycle. Use this formula: The goal divided by the closing percentage tells us how much potential business must be in the pipeline. Then, subtract the length of your sell cycle from the date of the goal. This tells you exactly when that potential business must be in your pipeline. Your job is to make sure that enough business enters the pipeline in the proper month. In this example, \$666,667 in potential new business must enter the pipeline in February in order to guarantee that \$200,000 will be closed in June.

Historically, you have chosen salespeople based on their ability to sell and not because you liked them. Since this is a good thing, you should continue to choose salespeople based on your existing criteria.

You have an ongoing recruiting program and I like that. This can be even more powerful when you create a profile of your ideal salesperson and attempt to upgrade the overall quality of your sales force. If you are constantly expanding or replacing people because they don't work out, then this is ongoing recruiting by default. If you are attempting to build the most effective sales force imaginable, then you are on the right road.

Your ability to be flexible with your salespeople is a strength. When they recognize this they will be more comfortable approaching you with problems. Flexibility also enhances creativity, which may help your salespeople arrive at more effective solutions.

You have learned to give out strokes on a regular basis, as well as recognition for a job well done. If you continue to practice this sales management gem you will build the self-image of your salespeople and improve their bravery.

Since you've taken the time to determine what each salesperson really wants from life, you have the power to motivate them to reach their personal goals. They will always work harder and more effectively for the boat, dream house, car or special vacation than they will to help you reach your plan. Use this knowledge and remind each of them, as often as possible, what they are really working for. They will crash through goals like never before.

It seems like you're doing the right things in your sales meetings. Motivating your sales force to achieve a positive outlook should be your number one priority. A positive outlook strengthens bravery and that affects style and ultimately results. Continue to motivate and you will be rewarded for your efforts.

Confidential Evaluation for Mary Smith

SUMMARY OF SALES MANAGEMENT SKILLS		
Findings	Core Competency	Notes
Knows How to Manage Salespeople's Behavior	22	
Managing the Pipeline Correctly	22	
Effective Interviewing Criteria	23	
Will Replace Ineffective Salespeople	23	
Flexible Thinker	24	
Knows What Motivates the Salespeople	25	
Runs Effective Sales Meetings	25	

Note: You will find a list of Core Competencies at the end of this assessment.

THESE WEAKNESSES CAN NEUTRALIZE STRENGTHS AND SKILLS

You trust people, and that's not bad - but in the future you should be more skeptical of what your prospects say. Dealing with a prospect is different than socializing with friends. In the world of business your prospects have their barriers up, whereas in the company of friends, their barriers are lower. When you trust prospects too much, you may not ask enough questions, could ask the wrong questions, mistake stalls for promises and waste time with prospects that don't end up buying from you. Rather than accepting what your prospects say at face value because it's what you want to hear, recognize that it is even more likely that your prospect is putting you off.

You probably need to develop your closing urgency. You may have more difficulty closing a sale on your first attempt due to this lack of intensity. When sales managers lack closing urgency prospects often get away with game playing and manipulating. Sales calls often end without decisions and you might shy away from asking tough questions when a situation calls for it. This is very often accompanied by need for approval. Develop your closing urgency by placing more importance on winning and ultimately, closing during the first real closing opportunity, on whichever call that may be.

You seem to be fairly happy with your current level of income and while that's certainly an accomplishment on your part, it can also be very self-limiting. If it causes you to become complacent you may fail to perform at levels that can increase sales and income. Complacency can also prevent you from tackling obstacles from which you may feel threatened. In order to become money motivated once again, you must put additional effort into the goal setting process. You should develop new personal goals that require more income than the level to which you are presently accustomed.

It seems that earning more money is not extremely important right now and while many would praise you for that, sales management success is extremely dependent on a desire to make a lot more money. Without it there can be a negative impact on desire and commitment, while the strong urge to earn a lot more money is a major strength. If you haven't already done so, please begin to work on new personal goals which would require that you earn more money. You may find something exciting and motivating to shoot for which costs A LOT of money.

Confidential Evaluation for Mary Smith

SUMMARY OF WEAKNESSES		
Findings	Core Competency	Notes
Lacks a Written Plan for Reaching Personal Goals	2	
Self Limiting Record Collection	6	
Too Trusting of Prospects	8	
Has a Non Supportive Buy Cycle	11	
Lacks Closing Urgency	19	
Not Motivated To Earn More Money	20	
Satisfied With Current Level of Income	20	

Note: You will find a list of Core Competencies at the end of this assessment.

CHALLENGES YOU MAY ENCOUNTER IN SELLING SITUATIONS

Your prospects have been lying to you and you've been taking stalls and put-offs. While that happens to many new salespeople, you've allowed it to continue. You have been very sympathetic, buying into their sob stories, understanding their problems and yielding to their games. This wastes precious time when you continue to call on the very people that don't want to talk with you. The weaknesses responsible when you accept put-offs are usually need for approval and getting emotionally involved. You must become strong enough to turn a put-off into either a "yes" or a "no."

Your persistence seems to be one of your strong points. If someone needs to have something followed up, they ought to have you do it. My concern is that your willingness to follow-up masks your tendency to get into the follow-up mode in the first place. This happens when you accept stalls or put-offs. It would be more prudent to deal with the stalls when they first come up. Help your prospects make decisions instead of allowing them to put you off and waste your time.

You rarely make a major buying decision without thinking it over first. If there is one self-limiting record that has more impact than any other it is this one. Your need to think things over causes you to accommodate prospects that want to think things over. Since thinking it over makes sense to you, your closing techniques may not be executed effectively. This non-supportive record may also prevent you from effectively coaching salespeople that have this record. You must change the way you make buying decisions so that making an informed but instant decision becomes normal. It will empower you and your salespeople to become much more effective closers.

Your tendency to research a product, service or dealer before a major purchase makes you nearly as knowledgeable as the salesperson from whom you'll buy. Your need to learn can make you vulnerable to prospects that also conduct research. As a result, you may be very willing to prematurely present information. This includes explaining what you can do, how you can do it, why it would work and how much it all costs - all this before your prospect is thoroughly qualified and committed to make a decision. At its best, providing information without a commitment is unpaid consulting. At its worst, the more your prospect knows, the less incentive he has to speak with you! This non-supportive record may prevent you from helping salespeople that have the same record. You must change the non-supportive record and behavior so that research is no longer necessary when making major purchases.

Typically, you haven't received a great number of referrals and introductions. The easy answer is that you probably haven't asked for many! You can continue to make a lot of cold calls, which isn't the best use of time or you could call on people that actually choose to speak with you! Adopt a policy that requires you to replace every prospect with another prospect and you'll soon have enough referrals and introductions to replace cold calling.

Confidential Evaluation for Mary Smith

I'm sure you've realized that purchasing agents rarely have the ability to say yes and their primary interest lies in pricing. Selling doesn't begin or take place with purchasing agents or buyers although it may be finalized there. It's important to begin the sales process with people in the company that have problems you can solve. You can be much more effective selling to them first and involving purchasing later. Get your prospects to handle the people in purchasing for you and you'll make even better use of your time.

Your prospects are controlling your sales calls more than you thought even though much of it looks and sounds like give and take. When your prospects don't share vital information, do what they're asked, tell you about their problems and explain why and how they'll buy from you, then they are playing games. You may find that asking more specific questions will help you gain more control. Remember that the prospect is in complete control when you are talking. When you're listening, you are in control. When you're getting truthful information you'll have the control you need to get their business.

It looks like you may not be developing strong bonding and rapport with your prospects early enough during the first appointment. Many salespeople are able to establish rapport, but fail to create real bonding, a sense that you belong together. Bonding can be the difference between having a loyal customer and having a customer that doesn't feel any sense of loyalty. With proper bonding and rapport the sell cycle is shorter, the prospect feels more comfortable, you'll receive more crucial information and he'll be more cooperative. Bonding will also help you sell those prospects that are not only very different from you, but with whom you've had difficulty "hitting it off" in the past. Establish your relationship early during the first appointment and you'll experience a dramatic improvement in how your prospect deals with you!

Sometimes you do the right things and unfortunately, sometimes you don't. A more consistent process would yield more consistent results. A builder can't erect a home without a blueprint, a software developer can't write a program without a flow chart, electrical engineers don't build circuit boards without schematic diagrams and you can't sell effectively without a selling system. Determine what must take place on each and every call, in what order those events SHOULD occur and then make sure that they do. In its simplest form, a system should include bonding and rapport, examination for problems, a commitment to solve problems, ability to pay for solutions, identification and meeting with decision-makers, agreement on the outcome and of course, your proposed solution, in that order.

You are making a fair share of proposals (or quotes) and while it's nice when you win the business, most proposals don't. A lot of time and energy are wasted preparing proposals. You can be far more effective if you know in advance whether or not you will get the business. Then, prepare proposals only for those orders that you will actually get. Ask your prospect more questions and get a firm commitment prior to working on a proposal.

Confidential Evaluation for Mary Smith

SUMMARY OF CHALLENGES YOU MAY ENCOUNTER IN SELLING		
Findings	Core Competency	Notes
Accepting PutOffs	8	
Inappropriate Follow Up	8	
Making Inappropriate Presentations	11	
Not Getting Enough Referrals	12	
Calling on Purchasing Agents Too Early in the Process	13	
Talking Too Much	14	
The Games and Lies of Prospects	14	
Not Developing Bonding and Rapport Early Enough in the Process	15	
Wasting Time With Prospects Due to Ineffective Selling System	17	
Inappropriate Quotes or Proposals	18	

Note: You will find a list of Core Competencies at the end of this assessment.

**CHALLENGES YOU MAY ENCOUNTER IN
SALES MANAGEMENT SITUATIONS**

I'm not saying that you love to shop, but it is obvious that you comparison shop when making a major purchase. While there isn't anything wrong with this, it could interfere with sales and sales management success. Your inclination to shop around, see what else is out there and make comparisons causes you to tolerate the same behavior from your prospects when they wish to compare you to others. This non-supportive record may also prevent you from effectively coaching salespeople that have this record. Change this self-limiting behavior by choosing only one dealer from whom you wish to purchase. When this finally becomes normal you and your salespeople will no longer understand why your prospect would want to shop YOU around. Only then will you be able to use your effective techniques to discourage your prospect from shopping.

You haven't been tough enough on yourself or your salespeople. When you fail to raise expectations you are left with no choice but to accept mediocrity. In some ways this sends your people a message that it's OK to settle for less, sell yourself short and put in a partial effort. Begin to raise expectations immediately by starting with your own.

You have fallen into the proverbial sales management trap where you no longer manage your salespeople but manage everything else instead. Ultimately, only your salespeople can bring in the business while your paperwork, desk and fire fighting contribute very little. You should redefine your priorities so that you are spending the majority of your time actually working with and developing your salespeople.

To develop a stronger sales force you'll need to give your salespeople permission to fail...to mess up and get a "no"! When they know it's OK to bring back a "no" they'll become more effective closers and sales will improve. This practice includes those sales calls on which a salesperson is blowing the call. Let him blow it, don't step in to help and when the call is over, be certain that he understands what he did wrong. Make sure a lesson was learned and then encourage him to return and salvage the sale.

I believe that your coaching skills need improvement. This isn't unusual. Most sales managers have not been trained for the position and many have not even been trained for sales. I don't want to criticize your sales management skills without offering some proof. When you look at the suggestions in this review you'll read specific examples of what needs to change. I've also provided some direction to help you make the changes! Your salespeople deserve to have a sales manager with highly developed coaching skills. If you wish to become a great sales manager then you must master the art of coaching.

Confidential Evaluation for Mary Smith

You may be missing out on one of the most significant elements of effective sales management - the debriefing! Most sales managers merely ask what happened on a call. Then they suggest what to do next. This may help the salesperson bring in the business but it won't make him any stronger and a lesson won't be learned. He may not understand why he achieved a particular outcome. It's important that you begin to ask "why" instead of "what happened." Debriefing should begin with the outcome and work backwards. Ask the salesperson to tell you why each event took place, or in the case of upcoming calls, why they will take place.

Joint sales calls are OK, but you must never allow a new salesperson to watch you sell. It's OK for you to watch them, but let them close, let them fail and let them grow. If your salespeople need to learn from you, teach them in the office where they can't be demotivated if you fail, or intimidated if you're brilliant!

Confidential Evaluation for Mary Smith

SUMMARY OF CHALLENGES YOU MAY ENCOUNTER IN SALES MANAGEMENT SITUATIONS		
Findings	Core Competency	Notes
Likely to be Ineffective Coaching Salespeople whose Prospects Comparison Shop	11	
Likely to be Ineffective Coaching Salespeople whose Prospects That Wish To Think it Over	11	
Not as Demanding as He/She Thinks	22	
Not Spending Enough Time Managing the Salespeople	24	
Not Willing to Let Salespeople Fail - Rescues Them too Quickly	24	
Not Giving Recognition Appropriately	25	
Not Being Effective Coaching Salespeople	26	
Not Debriefing Effectively	26	
Handling Joint Sales Calls Ineffectively	26	

Note: You will find a list of Core Competencies at the end of this assessment.

BROKEN RECORDS

The following statements are self-limiting records in your “Record Collection.” You should understand how self-limiting records adversely impact your performance. For instance, if you don’t believe in ghosts, experience would tell me that in all certainty you’ve never seen one. If you believe in objections, and I’m sure you do at this point, you probably hear them with regularity. Ask yourself an important question. Is your current set of self-limiting records your own from experience, or did the individual who first taught you how to sell loan them to you? They are listed below in two groups. The first list contains those self-limiting records related to sales management situations. The second list is the set of self-limiting records related to selling situations.

ACTION STEPS:

1. Determine the outcome you are getting as a result of these self-limiting records.
2. Determine how your outcomes should be different.
3. Rewrite the “record” so that it supports the newer, more favorable outcome.

This assessment contains examples that demonstrate how these self-limiting records may cause selling obstacles, thereby preventing you from being as successful in sales as you might wish.

BROKEN RECORDS RELATED TO SALES MANAGEMENT SITUATIONS

SALES MANAGEMENT SELF-LIMITING RECORDS	
Findings	Notes
I can't let a salesperson lose a piece of business	
Raising my people's self esteem is not a high priority.	
My salespeople should watch me sell	
It's OK if my salespeople let their prospects shop around	
It's OK if my salespeople let their prospects think it over	
My salespeople need to present information to their prospects when asked	

BROKEN RECORDS RELATED TO SALES SITUATIONS

SALES SELF-LIMITING RECORDS	
Findings	Notes
I have to call on buyers prior to end users or decision-makers	
Prospects are honest	
Prospects that think it over will eventually buy from us	

WHAT THE GROW CHART MEANS

As you recall, you learned about and rated yourself on the ingredients that are important for success in client development. As you'll see on the Grow Charts, all of these ingredients are inter-related as follows:

Desire, the single most important element of the eleven, measures your passion for success in sales management. It also helps to indicate whether you are motivated to earn additional income. Lack of desire is often responsible when a sales manager avoids unpleasant activities.

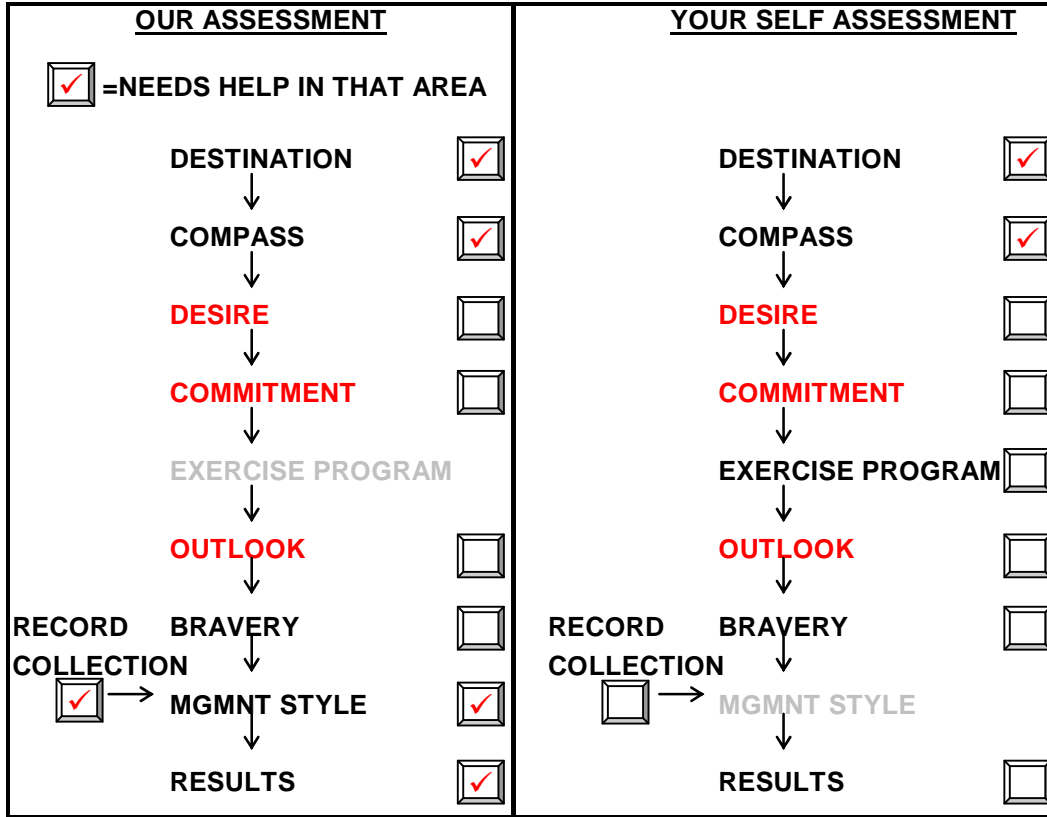
If I indicated that you lack desire you can look to your destination and compass for help. Destination tells us whether you have clear, exciting personal dreams and goals and compass indicates whether or not you are on track to reach them by the desired date. If the destination is not established then it may explain why desire isn't very strong. Desire improves when an individual gets excited about a clear destination and recognizes that he can fulfill that dream using his career as the vehicle. If you already have clear destination yet still lack desire, the hoped for improvement may be more difficult to obtain.

With a clearly established destination the compass can be set once a realistic plan has been finalized. Once you have clear destination and a working plan there is finally something to which you can commit. With a strong commitment to the destination and compass, an exercise program can be established. There is a two-part process consisting of preparation (you know what you have to do) followed by execution (you actually do what your exercise plan calls for). An exercise program is the first step in execution and a critical step for success because it not only calls for consistent, daily prospecting (or in some cases, servicing), but when used effectively, it also predicts future sales and cash flow.

When exercising is consistent, you will begin to see progress on your plan, feel better about your accomplishments and therefore, your self-image improves. Self-image is the most important part of outlook. With an improved outlook bravery slowly begins to improve. Record collection and bravery support style. A supportive record collection enables you to develop and improve your style. This is crucial if you wish to take control of the client development process and execute both new and old techniques.

A committed person with a strong desire for sales management success, clear destination and properly set compass, a consistent exercise program and supportive record collection, healthy outlook, strong bravery and an effective style will be a winner. These elements are all extremely important but they should not be confused with an individual's characteristics or traits. While characteristics and traits have permanence to them, these elements are actually conditions. As with the weather, conditions can change rapidly! If you have not perfected each of these elements yet improve upon them, you will see dramatic results. A formula which might explain how things work is: Desire + Commitment = Effort. Consistent effort over time = results.





ASSESSMENT OF YOUR SALES MANAGEMENT GROW CHART





Understanding the Grow Chart

The left chart above depicts how we assessed you. The right chart depicts how you assessed yourself. The arrows running between the elements show you how the elements support each other. For example, *Record Collection* and *Bravery* support Style (how you combine your personality with technique and a selling process), while *Bravery* is supported by *Outlook*. A checkmark indicates that you must continue working to improve in that particular area.

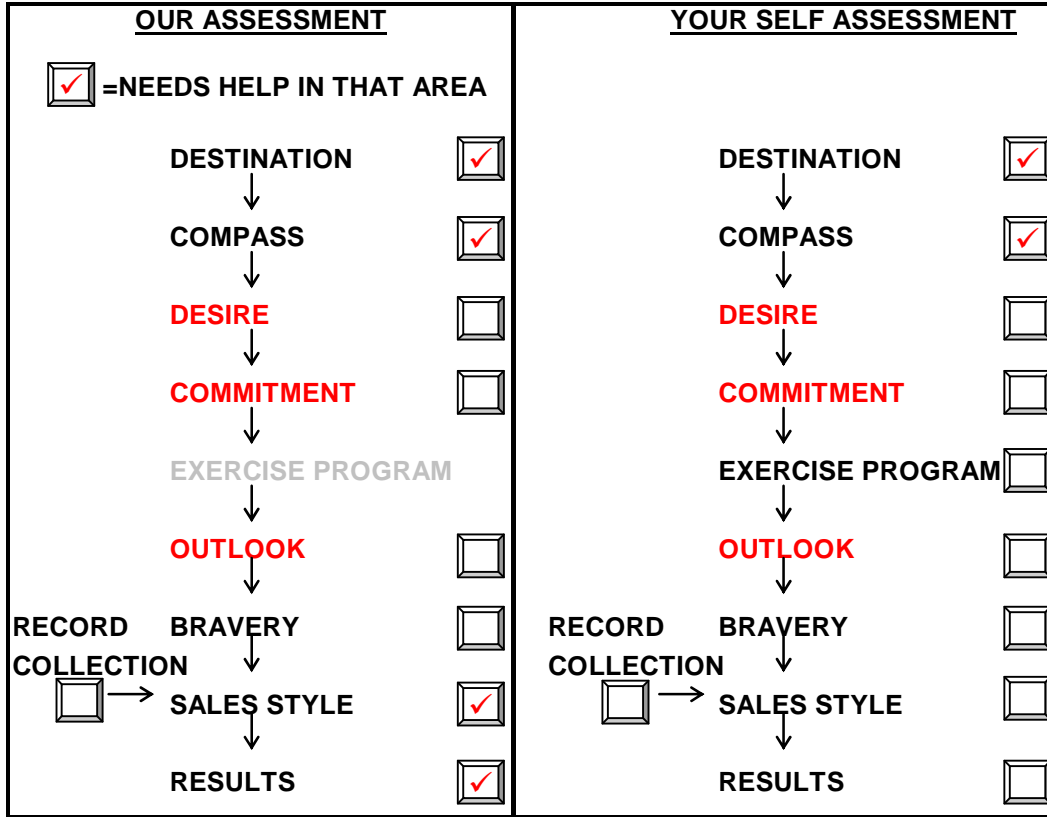
**ELEMENTS CONTRIBUTING TO YOUR
SALES MANAGEMENT GROW CHART FINDINGS**

		DESTINATION			COMPASS
✓		Has Goals		✓	Has a Goals Management Plan
✓		Has Them In Writing	✓		Has a Tracking System
	✓	Has An “Accomplish By” Date			
OUTLOOK			DESIRE		
✓		Has a Good Outlook	✓		Has enough Desire to Make Changes
COMMITMENT			MGMT RECORD COLLECTION		
✓		Has enough Commitment to Make Changes		✓	Has Supportive Mgmt Record Collection
MANAGEMENT STYLE			BRAVERY		
✓		Will Upgrade the Sales Force	✓		Has Overcome the Need for Approval from Prospects
	✓	Can Develop People	✓		Recovers from Rejection
	✓	Has Superior Coaching Skills	✓		Has Control of Emotions
✓		Has Good Interviewing Skills	✓		Has Overcome the Need for Approval from Salespeople

 A check mark in this column indicates that you have mastered the specified strength or skill. We feel that you need little to no improvement in this area.

 A check mark in this column indicates that you have not yet mastered the specified strength or skill. We feel that additional work, help, coaching and/or training is needed in this area.





ASSESSMENT OF YOUR SALES GROW CHART





Understanding the Grow Chart

The left chart above depicts how we assessed you. The right chart depicts how you assessed yourself. The arrows running between the elements show you how the elements support each other. For example, *Record Collection* and *Bravery* support Style (how you combine your personality with technique and a selling process), while *Bravery* is supported by *Outlook*. A checkmark indicates that you must continue working to improve in that particular area.

ELEMENTS CONTRIBUTING TO YOUR SALES GROW CHART FINDINGS

		DESTINATION			COMPASS
✓		Has Goals		✓	Has a Goals Management Plan
✓		Has Them In Writing	✓		Has a Tracking System
	✓	Has An “Accomplish By” Date			
		OUTLOOK			DESIRE
✓		Has a Good Outlook	✓		Has enough Desire to Make Changes
		COMMITMENT			SALES RECORD COLLECTION
✓		Has enough Commitment to Make Changes	✓		Has Supportive Sales Record Collection
		BRAVERY			SELLING STYLE
✓		Has Overcome the Need for Approval from Prospects		✓	Quickly Develops Bonding and Rapport
✓		Recovers from Rejection		✓	Has & Uses an Effective Selling System
✓		Has Control of Emotions	✓		Effective When Asking Questions
			✓		Attempts to Close
			✓		Has Capacity to Uphold Margins

 A check mark in this column indicates that you have mastered the specified strength or skill. We feel that you need little to no improvement in this area.

 A check mark in this column indicates that you have not yet mastered the specified strength or skill. We feel that additional work, help, coaching and/or training is needed in this area.

GROW CHART DEFINITIONS

DESTINATION - How clearly the individual has defined their goals.

COMPASS – How well the individual is aimed at their destination.

DESIRE – The individual’s passion for success.

COMMITMENT – The individual’s willingness to do whatever it takes.

EXERCISE PROGRAM – The consistent actual performance of planned activity.

OUTLOOK – How the individual feels about themselves, their job and their company.

BRAVERY – The ability to do what must be done, even when it is uncomfortable.

RECORD COLLECTION – The quality (supportive vs. self-limiting) of the collection of beliefs held by the individual.

STYLE – The combination of personality, bonding and rapport, technique and selling process necessary for effective selling.

MGMT STYLE – The combination of recruiting, coaching, holding salespeople accountable, recognition and motivation necessary for effective sales management.

RESULTS – The bottom-line.

CORE COMPETENCY REFERENCE

The core competency numbers are used in the Strength, Skill, Weakness and Challenges sections of the assessment. An evaluation of a sales manager includes findings which can belong to either a sales or a sales management core competency. Using the core competency number you can look up the title of the competency to the right and identify whether the competency is a sales or sales management core competency.

Core Competency List		
Number	Title	Type
1	Has Written Goals	Sales and Management
2	Follows Written Goals With a Plan	Sales and Management
3	Has Positive Attitude	Sales and Management
4	Takes Responsibility	Sales and Management
5	Strong Self-Confidence	Sales and Management
6	Supporting Record Collection	Sales and Management
7	Controls Emotions	Sales and Management
8	Doesn't Need Approval	Sales and Management
9	Recovers From Rejection	Sales
10	Comfortable Talking About Money	Sales
11	Supportive Buy Cycle	Sales and Management
12	Consistent Effective Prospecting	Sales
13	Reaches Decision Makers	Sales
14	Effective Listening and Questioning	Sales and Management
15	Early Bonding and Rapport	Sales and Management
16	Uncovering Actual Budgets	Sales
17	Discovering Why Prospects Buy	Sales
18	Qualifies Proposals and Quotes	Sales and Management
19	Gets Commitments and Decisions	Sales and Management
20	Strong Desire for Success	Sales and Management
21	Strong Commitment for Success	Sales and Management
22	Holds Salespeople Accountable	Management
23	Recruits Consistently and Effectively	Management
24	Grows the Sales Force	Management
25	Effectively Motivates the Salespeople	Management
26	Consistently and Effectively Coaches Salespeople	Management
27	Post Call Debriefing	Management
28	Pre-Call Strategizing	Management

STRENGTH AND WEAKNESS SUMMARY

THE DAVE KURLAN SALES FORCE PROFILE™

Evaluation of: Mary Smith

Company: Sample Corporation

Date: 10-Jul-2007

Evaluated By: Dave Kurlan

These strengths support the selling process

Has Written Goals But Needs To Set a Date
A Good Outlook
Takes Responsibility for any Lack of Results
Good Self Image
Seldom Loses Control of Emotions
Slight Need For Approval From Prospects
No Need For Approval From Salespeople
Rejection Proof
High Money Tolerance
Capable of Upholding Margins
A Strong Desire
A Strong Commitment

Mary has developed these skills

Skills related to sales management:

Knows How to Manage Salespeople's Behavior
Managing the Pipeline Correctly
Effective Interviewing Criteria
Will Replace Ineffective Salespeople
Flexible Thinker
Knows What Motivates the Salespeople
Runs Effective Sales Meetings

Skills related to selling:

Won't Make Many Assumptions
Effective Handling People
Asks Prospects Why They Would Buy
Asks How Prospects Will Make Buying Decision
Gets Prospects to Make Decisions

These weaknesses may neutralize those strengths and skills

Lacks a Written Plan for Reaching Personal Goals
Self Limiting Record Collection
Too Trusting of Prospects
Has a Non Supportive Buy Cycle
Lacks Closing Urgency
Not Motivated To Earn More Money
Satisfied With Current Level of Income

Mary is vulnerable to these selling situations or events

Challenges related to sales management:

Likely to be Ineffective Coaching Salespeople whose Prospects Comparison Shop
Likely to be Ineffective Coaching Salespeople whose Prospects That Wish To
Think it Over
Not as Demanding as He/She Thinks
Not Spending Enough Time Managing the Salespeople
Not Willing to Let Salespeople Fail - Rescues Them too Quickly
Not Giving Recognition Appropriately
Not Being Effective Coaching Salespeople
Not Debriefing Effectively
Handling Joint Sales Calls Ineffectively

Challenges related to selling:

Accepting PutOffs
Inappropriate Follow Up
Making Inappropriate Presentations
Not Getting Enough Referrals
Calling on Purchasing Agents Too Early in the Process
Talking Too Much
The Games and Lies of Prospects
Not Developing Bonding and Rapport Early Enough in the Process
Wasting Time With Prospects Due to Ineffective Selling System
Inappropriate Quotes or Proposals

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Mary's record collection contains these self limiting records

Records related to sales management:

I can't let a salesperson lose a piece of business

Raising my people's self esteem is not a high priority.

My salespeople should watch me sell

It's OK if my salespeople let their prospects shop around

It's OK if my salespeople let their prospects think it over

My salespeople need to present information to their prospects when asked

Records related to selling:

I have to call on buyers prior to end users or decision-makers

Prospects are honest

Prospects that think it over will eventually buy from us