

# Objective Management Group, Inc.



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## The Dave Kurlan Sales Force Profile™

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### Salesperson's Self Assessment

Jane Smith  
Sample Corporation

(10-Jul-2007)



**Objective  
Management  
Group, Inc.**

**THE DAVE KURLAN SALES FORCE PROFILE <sup>TM</sup>**

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, 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 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.

Most salespeople 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 salesperson. While a comparison to Joe or Mary Average would show you in a more favorable light, it would only serve to encourage mediocrity.

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

**SUMMARY**

Dear Jane,

I'm very pleased with your strong desire and commitment for success in selling. This will make it very easy to make the changes suggested on the following pages. On the other hand I am concerned with your outlook. A less than perfect outlook can impact negatively on bravery and ultimately results. Please determine the cause of your outlook problem and quickly remedy it.

You've developed some terrific strengths for selling, but your remaining weaknesses are the kind that can actually neutralize all those good strengths! You'll find that by making a few changes now, you'll have a much easier time of it down the road.

I believe that you will see a significant increase in selling 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.

	<b>Strength</b>	<b>Weakness</b>
<b>Crucial Elements</b>		
Desire	✓	
Commitment	✓	
Responsibility	✓	
Outlook		✓
<b>Major Weaknesses</b>		
Need For Approval	✓	
Controls Emotions	✓	
Record Collection		✓
Buy Cycle	✓	
Money Issues	✓	
<b>Other Findings</b>		
Enjoys Selling	✓	
Money Motivated		✓
Potential For Growth		<b>34</b>
Sales Quotient		<b>136</b>

Confidential Evaluation for Jane Smith

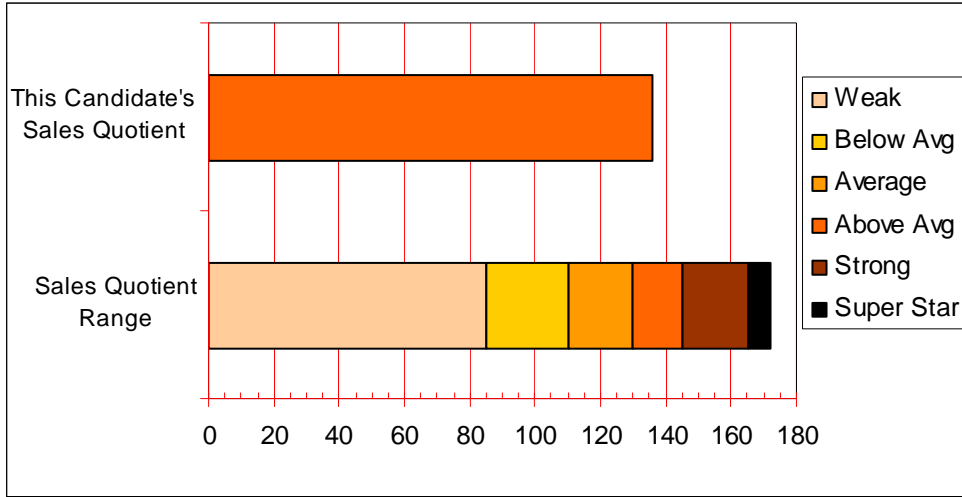
<b>SPECIAL SKILL SETS DETAIL</b>				
<p>The information in this section indicates your attributes for several management skill sets. Shaded attributes represent negative traits within each skill set. For additional explanation of skill sets go to <a href="http://www.objectivemanagement.com/references/index.htm">http://www.objectivemanagement.com/references/index.htm</a></p>				
<b>Hunter</b>		<b>Present</b>	<b>Account Manager</b>	<b>Present</b>
Prospects Consistently		✓	Develops Bonding and Rapport	✓
Gets Past Gatekeepers		✓	Gets To Decision Makers	✓
Gets To Decision Makers		✓	Uncovers Actual Budget	
Gets Appointments When Prospecting		✓	Knows How To Handle People	
Receives Plenty of Introductions			Effective Time Management	✓
Will Prospect		✓	Lacks Closing Urgency	
Has No Need For Approval		✓	Has Need For Approval	
Recovers From Rejection		✓	Won't Prospect	
	<b>% of Traits</b>	<b>88%</b>	Believes – "I should be their friend"	
			Inappropriate Follow Up Calls	✓
			<b>% of Traits</b>	<b>40%</b>
<b>Closer</b>			<b>Intellectual</b>	
Gets Prospect To Agree To Make Decision		✓	Attempts To Close	
Won't Make Inappropriate Quotes			Uncovers Budget	
Gets to Decision Makers		✓	Gets To Decision Makers	✓
Attempts to Close			Learns Why Prospects Buy	
Has Closing Urgency			Learns How Prospects Buy	
Won't Accept PutOffs			Has At Least 10 Skills	
Has Supportive Buy Cycle		✓	Has Need For Approval	
Has No Need For Approval		✓	Has Non-Supportive Buy Cycle	
Controls Emotions		✓	Has Self Limiting Record Collection	✓
	<b>% of Traits</b>	<b>56%</b>	Has Money Issues	
			Has Difficulty Controlling Emotions	
			<b>% of Traits</b>	<b>18%</b>
<b>Qualifier</b>			<b>Ambassador</b>	
Uncovers Actual Budget			Develops Bonding and Rapport (skill)	✓
Gets To Decision Makers		✓	Gets Referrals and Introductions (skill)	
Learns Why Prospects Would Buy			Knows How To Handle People (skill)	
Learns How Prospects Would Buy			Enjoys Selling	✓
Does NOT Assume			Inappropriate Follow Up Calls	✓
Comfortable Talking About Money		✓	Wasting Time – Selling System	✓
Has High Money Tolerance		✓	Believes – "I should be their friend"	
Has No Need For Approval		✓	Skills Limited To Those 3 Above	
Controls Emotions		✓	<b>% of Traits</b>	<b>50%</b>
Has Supportive Record Collection				
	<b>% of Traits</b>	<b>50%</b>		
<b>Farmer</b>			<b>Timid</b>	
Has Closing Urgency			Has Low Self Esteem	
Attempts To Close			Has Need For Approval	
Controls Emotions		✓	Has Difficulty Recovering From Rejection	
Won't Accept PutOffs			Uncomfortable Talking About Money	
Has Supportive Buy Cycle		✓	Has Outlook Problem	✓
Has Difficulty Recovering From Rejection			Is Not Money Motivated	✓
Has Need For Approval			<b>% of Traits</b>	<b>33%</b>
Won't Prospect				
	<b>% of Traits</b>	<b>25%</b>		

Confidential Evaluation for Jane Smith

COMPATIBILITY CHART			
Match	Topic	Company's Requirements	Your Responses
*YES	Primary Market	<ul style="list-style-type: none"> <li>• Corporate/Industrial</li> <li>• Small Business / Professional Office</li> </ul>	<ul style="list-style-type: none"> <li>• Corporate/Industrial</li> <li>• Small Business / Professional Office</li> <li>• Institutional</li> </ul>
YES	Prospects by Title	<ul style="list-style-type: none"> <li>• President or Owner</li> <li>• VP or top administrator</li> <li>• Technical end user</li> </ul>	<ul style="list-style-type: none"> <li>• President or Owner</li> <li>• VP or top administrator</li> <li>• Technical end user</li> <li>• Husband and wife</li> </ul>
YES	Need vs Want	<ul style="list-style-type: none"> <li>• Need but don't want</li> </ul>	<ul style="list-style-type: none"> <li>• Need and want</li> <li>• Need but don't want</li> <li>• Do not need but want</li> </ul>
YES	Competition	<ul style="list-style-type: none"> <li>• Three to five</li> </ul>	<ul style="list-style-type: none"> <li>• More than five</li> <li>• Three to five</li> <li>• Wish I had more</li> </ul>
YES	Pricing	<ul style="list-style-type: none"> <li>• Higher than the competition</li> <li>• On par with the competition</li> </ul>	<ul style="list-style-type: none"> <li>• Higher than the competition</li> <li>• On par with the competition</li> <li>• Lower than the competition</li> </ul>
*YES	Money	<ul style="list-style-type: none"> <li>• Between \$1K and \$25K</li> <li>• Between \$25K and \$250K</li> </ul>	<ul style="list-style-type: none"> <li>• Under \$1K</li> <li>• Between \$1K and \$25K</li> <li>• Between \$25K and \$250K</li> <li>• Above \$250K</li> </ul>
YES	Product Sold	<ul style="list-style-type: none"> <li>• Custom engineered solutions</li> <li>• Commodities</li> </ul>	<ul style="list-style-type: none"> <li>• Custom engineered solutions</li> <li>• Conceptual services</li> <li>• Products one can demonstrate</li> <li>• Commodities</li> </ul>
NO	Sell Cycle	<ul style="list-style-type: none"> <li>• A two to three call close</li> <li>• <i>Three to six months</i></li> </ul>	<ul style="list-style-type: none"> <li>• A two to three call close</li> </ul>
NO	Customer Development	<ul style="list-style-type: none"> <li>• <i>Sold them and moved on</i></li> <li>• Sold them on a regular basis</li> </ul>	<ul style="list-style-type: none"> <li>• Sold them on a regular basis</li> <li>• Sold them and renewed annually</li> <li>• Sold them and serviced them</li> </ul>
*NO	Priorities	<ul style="list-style-type: none"> <li>• 80% new and 20% current</li> <li>• <i>60% new and 40% current</i></li> </ul>	<ul style="list-style-type: none"> <li>• 80% new and 20% current</li> </ul>
*YES	Closing	<ul style="list-style-type: none"> <li>• Salesperson closes</li> </ul>	<ul style="list-style-type: none"> <li>• Salesperson closes</li> </ul>
YES	Presentations	<ul style="list-style-type: none"> <li>• Present once to the decision maker</li> <li>• Present once to a group</li> </ul>	<ul style="list-style-type: none"> <li>• Present once to the decision maker</li> <li>• Present once to a group</li> </ul>
YES	Product Quality	<ul style="list-style-type: none"> <li>• Top of the line</li> <li>• Middle of the pack</li> </ul>	<ul style="list-style-type: none"> <li>• Top of the line</li> <li>• Middle of the pack</li> </ul>
YES	Pressure	<ul style="list-style-type: none"> <li>• Medium</li> </ul>	<ul style="list-style-type: none"> <li>• High</li> <li>• Medium</li> <li>• Low</li> <li>• No pressure</li> </ul>
YES	Supervision	<ul style="list-style-type: none"> <li>• Seldom Managed</li> </ul>	<ul style="list-style-type: none"> <li>• Micro Managed</li> <li>• Seldom Managed</li> </ul>
YES	Company	<ul style="list-style-type: none"> <li>• Small to medium sized business</li> </ul>	<ul style="list-style-type: none"> <li>• Small professional firm</li> <li>• Small to medium sized business</li> </ul>
*YES	Compensation	<ul style="list-style-type: none"> <li>• Mostly commission</li> </ul>	<ul style="list-style-type: none"> <li>• Mostly commission</li> </ul>
YES	Environment	<ul style="list-style-type: none"> <li>• Rapid growth</li> </ul>	<ul style="list-style-type: none"> <li>• Turbulent and changing</li> <li>• Rapid growth</li> </ul>
YES	Location	<ul style="list-style-type: none"> <li>• Office with management</li> </ul>	<ul style="list-style-type: none"> <li>• Office with management</li> <li>• Branch office without management</li> <li>• Home or remote office without management</li> </ul>

You are comfortable with 84% of your company's expectations of an ideal salesperson. When the percentage of comfort is high, results are more consistent. An asterisk "\*" in the Match column indicates that the topic is considered key by your company. Company requirements not found in your comfort level are noted in red italics and underlined.

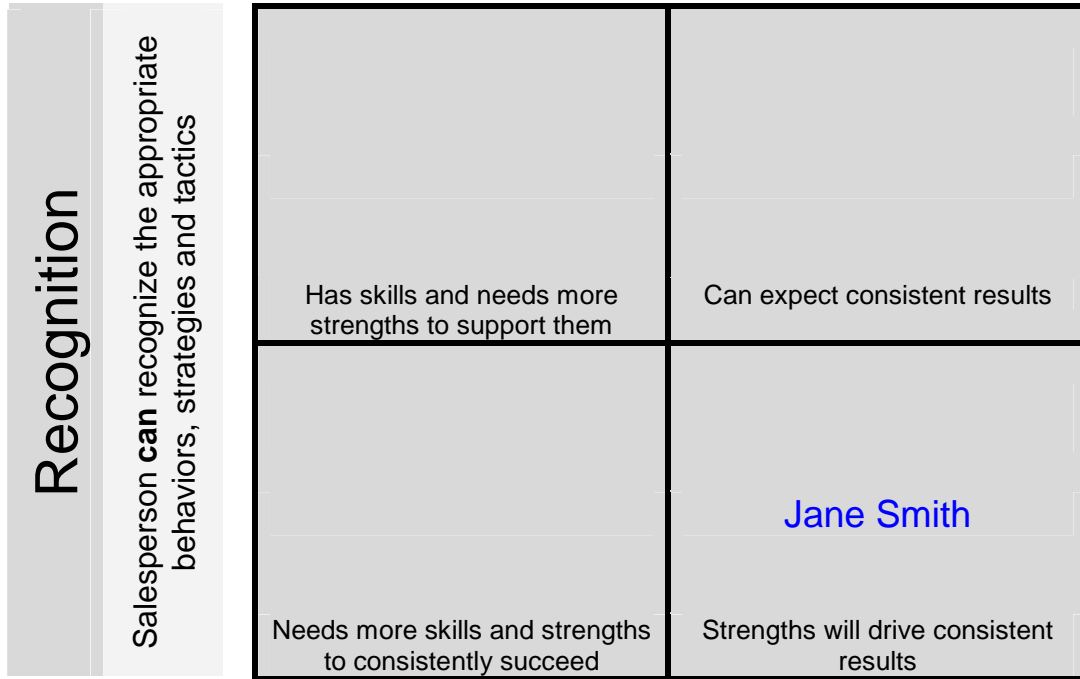
## SALES QUOTIENT



How to Read the Sales Quotient: The Sales Quotient is derived from 21 Core Competencies, weighted according to impact on the selling process. A perfect score of 172 is seldom achieved.

Your Sales Quotient is 136.

**CURRENT ABILITY TO ACHIEVE CONSISTENT RESULTS**

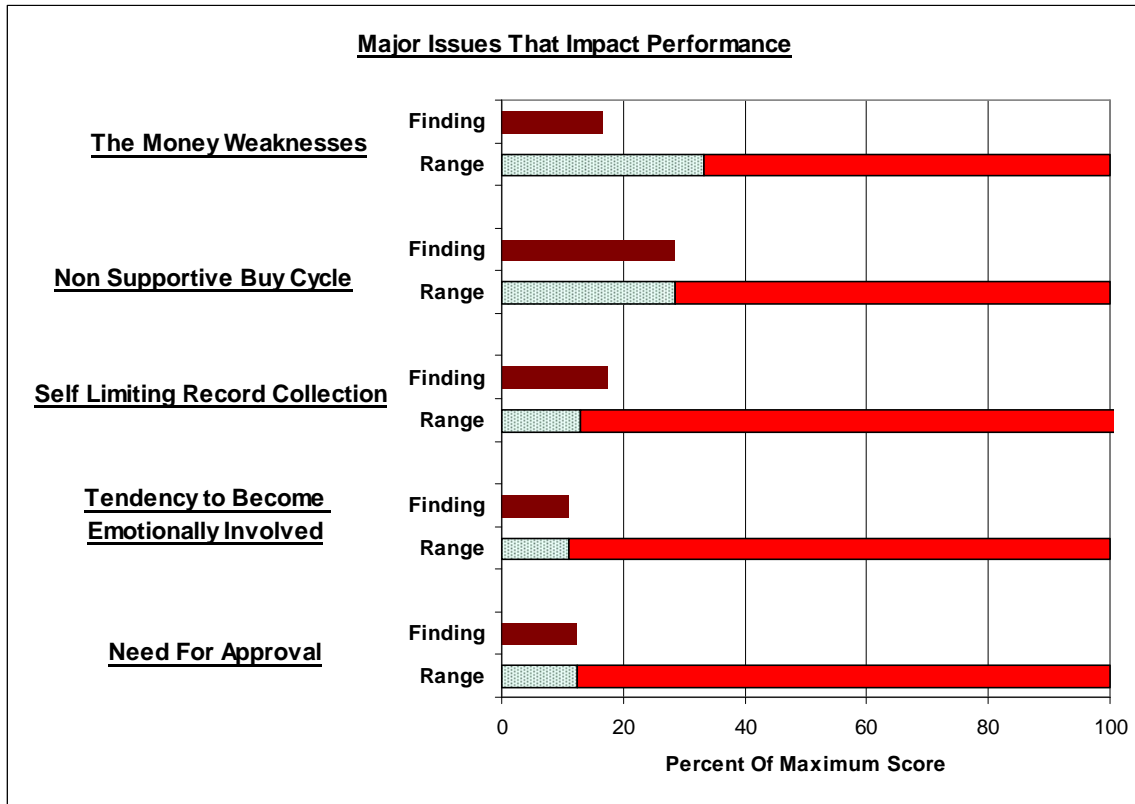


**Execution**  
Likelihood salesperson **will** execute the appropriate behaviors and tactics

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. Salespeople in the upper right quadrant are capable of the greatest consistency while salespeople 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 while your strengths indicate that you will have no difficulty executing the strategy you chose.

Combined Analysis Of:	Percentage Identified
Skills	32%
Strengths	67%
Weaknesses	23%
Likely Problems/Challenges	62%

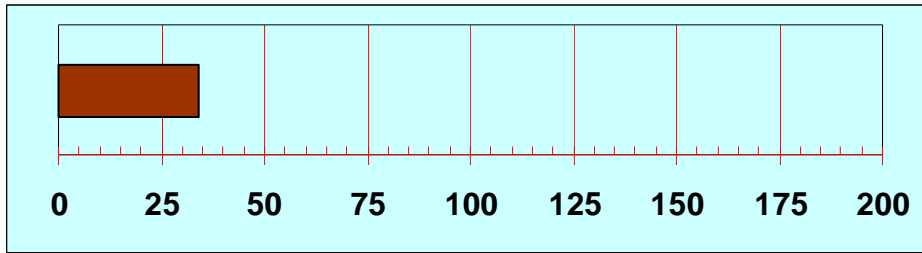
**Severity of Five Major Weaknesses for Jane Smith**



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 business development. (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 Self Limiting Record Collection is considered a weakness that impacts performance. The findings also indicate that The Money Weaknesses, Buy Cycle, The Tendency to Become Emotionally Involved and The Need for Approval are not severe enough to impact your sales performance.

**Growth Potential for Jane 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 34%. This means that you currently have the potential to be 34% more effective at generating business after you overcome your weaknesses and develop the complementary selling 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 SELLING PROCESS**

Congratulations for making the effort to actually set goals, put them in writing and set a deadline. Most salespeople aren't as thorough as you are. Continue to update those goals and your plan. Desire and commitment improve when you are excited by your goals!

Since you also have a goals management plan you should know exactly what is required each and every day in order to reach your goals. This is neglected by most salespeople. Next, make sure that you've committed to the daily execution of your plan and the goals should be all yours.

Your strong self-image is a vital attribute in sales. 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 keep you rejection proof, enhancing bravery while supporting techniques that have a positive impact on results.

Your enjoyment of the selling process will help you maintain a good outlook. This will support bravery, record collection and ultimately, style. Continue to enjoy yourself when you sell and it will help you to control your emotions too.

Your ability to act instinctively rather than reactively under pressure is a tremendous strength. Your ability to remain 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.

While you don't have a tremendous need to be liked, 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 - when your prospect wants to think things over and you want to get them closed - but you don't want them to stop liking you - so you take the stall. Sound at all familiar? To overcome your remaining need for approval, attempt to get your prospects to respect you instead of needing your prospects to like you.

## Confidential Evaluation for Jane Smith

You're able to handle rejection quite well. This desirable strength is often accompanied by strong self image, a positive outlook and fairly good bravery. When these elements are present together they support and empower your use of effective techniques. This strength is very supportive to and necessary for effective prospecting and closing.

You have the ability to talk about money with a great deal of ease. This supports your ability to have in depth financial conversations with your prospects. Talks of this nature help you determine exactly how much money your prospect will spend on your solution. This also supports your attempts to help prospects "find money" when they "don't have enough" in their budget.

You have a fairly good concept of how much money is "a lot". This should help in your dealings with prospects that believe you are 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.

Salespeople that make on the spot buying decisions are my favorites. This supportive record will help you persuade prospects to make decisions, especially when you use an effective technique. Continue to make instant decisions and you will get the majority of your prospects to make decisions at the first closing opportunity. Those that refuse will be the exceptions.

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 value is preferable to looking for the lowest price, but not as good as when price doesn't matter at all. Attempt to further improve this behavior until you don't understand why a prospect would want a lower price. If you empathize with the prospect you will lose either profit margin or the business.

We found that you are willing to prospect and do prospect consistently. We have commented on this in the "Skills" section of your assessment.

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

Confidential Evaluation for Jane Smith

<b>SUMMARY OF STRENGTHS SUPPORTING THE SELLING PROCESS</b>		
<b>Findings</b>	<b>Core Competency</b>	<b>Notes</b>
Has Written Personal Goals	1	
Has a Written Plan for Reaching Personal Goals	2	
Takes Responsibility for any Lack of Results (No Excuses)	4	
Good Self Image	5	
Enjoys Selling	6	
Seldom Loses Control of Emotions	7	
Slight Need For Approval	8	
Rejection Proof	9	
Able to Talk About Money	10	
High Money Tolerance	11	
A Decision Maker	11	
Capable of Upholding Margins	11	
Has a Supportive Buy Cycle	11	
Will Prospect and Does Prospect Consistently	12	
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**

Since you've been getting your fair share of appointments your next challenge is to make the appointments stronger. You know that prospects will talk with you, so make sure that there's a good reason to talk with them. Ask them what they'd like to talk about during your appointment and determine whether it will be a good use of your time.

You are one of the few salespeople who are both willing to prospect for new business and doing it consistently. This combination of mindset and behavior will keep your pipeline full and provide you with a never ending supply of opportunities. Continue to perform these important activities and take pride in your accomplishments.

You have been getting to final decision-makers and when handled effectively, it allows you to shorten the process, get the real budget, determine the real problem and learn what it will take to do business. Continue to meet these people and take advantage of the opportunities that exist when you deal with them!

Your ability to establish bonding and rapport early during the first conversation helps your prospects feel more comfortable about sharing important information. This can give you greater control of a shorter selling cycle. Continue to establish bonding and rapport early in the first call and use it to gather as much pertinent information as you can.

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 Jane Smith

<b>SUMMARY OF SELLING SKILLS</b>		
<b>Findings</b>	<b>Core Competency</b>	<b>Notes</b>
Good Time and Organizational Ability	2	
Able to Get Appointments When Prospecting	12	
Able to Get Past Gatekeepers	12	
Will Prospect and Does Prospect Consistently	12	
Consistently Gets to Decision-Makers	13	
Develops Bonding and Rapport Early in the Process	15	
Gets Prospects to Make Decisions	19	

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

**THESE WEAKNESSES CAN NEUTRALIZE STRENGTHS AND SKILLS**

I didn't find any evidence of a tracking system. Your success can be measured by how much money you earned last year, however, it doesn't measure your current progress or suggest adjustments that should be made in order to reach your goals by the end of the year. Create a daily tracking system by measuring the required daily actions as described in your plan against your actual daily performance. Hold yourself accountable in all vital areas of performance and attitude and you'll develop some wonderful consistency.

I believe you'll agree that your outlook is not as positive as it could be. Your symptoms could include, but aren't limited to: personal problems, unhappiness at work, discouragement, excuse making, complaining, a need to be right all the time, an alternate view of the sales world, low self esteem or an attitude problem. While there may be only one symptom, even one will affect your state of mind. Since outlook has an impact on bravery you may be wimping out in tough situations and becoming more emotional than normal. Make the needed adjustments now because you'll need a good, positive outlook to achieve greater success in sales.

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 much 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 won't buy from you. Don't accept what your prospects say at face value because it's what you wanted to hear. Recognize that the legitimate delay your prospect is telling you about is more likely a stall or a put-off.

It seems that earning more money is not extremely important at this time and while many would praise you for your non-materialistic attitude, sales success is extremely dependent on a desire to make a lot more money. The absence of this can have a negative impact on desire and commitment, while the strong urge to earn more is a major strength. If you haven't already done so, please begin to work on new personal goals that would require that you earn more money. Find something exciting that costs A LOT of money.

Confidential Evaluation for Jane Smith

<b>SUMMARY OF WEAKNESSES</b>		
<b>Findings</b>	<b>Core Competency</b>	<b>Notes</b>
No System for Tracking Progress	2	
Has Outlook Problem	3	
Self Limiting Record Collection	6	
Too Trusting of Prospects	8	
Not Motivated To Earn More Money	20	

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

### **CHALLENGES YOU MAY ENCOUNTER IN THE FIELD**

Your prospects have been lying to you and you've been taking their 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. Need for approval and getting emotionally involved are the two weaknesses that are usually to blame. 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.

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 success. When you shop around, learn about your options and make comparisons you could tolerate the same behavior from prospects that wish to compare you to others. Change this self-limiting behavior by choosing only one dealer from whom you wish to purchase. When this finally becomes normal you'll no longer understand when your prospects want to shop YOU around. Then you'll be able to use any of your effective techniques to discourage your prospects from shopping rather than allowing them to shop.

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. Therefore, you may be very willing to prematurely present information. This includes what you can do, how you can do it, why it would work and how much it all costs. And this is 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! You must change this non-supportive record and behavior so that research is no longer necessary when making major purchases.

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, (not 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 Jane Smith

While you may be discovering who will make the decision to buy, it doesn't appear that you're learning the process they'll use to decide whether to buy from you. They depend upon their unique process to instinctively know whether they are making a good decision. This is a key to moving the selling process forward and without it you may not be equipped to handle competitive situations effectively. Uncover and use their process to help them decide to do business with you!

Your prospects are controlling your sales calls 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 or 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.

Most salespeople could be more effective when it comes to asking questions, so you're certainly not alone. Questions are important to the selling process. Without the answers that those questions encourage you will always be missing important information. Failure to develop listening skills and a need to dominate the conversation hinder the development of strong questioning skills. This problem is also common when you have a tendency to become emotionally involved. Become more curious, especially when you already know the answer that you're seeking!

Prospects will exhibit some very unpredictable behavior. Whether or not you understand why, it's best to ask why they did what they did instead of assuming to know the reasons. Discounting a prospect's change in behavior makes things more difficult later in the process when you wonder why "this had to happen" to you. Whenever something unusual takes place, ask what happened and why! You may uncover opportunities that were previously hidden or be able to overcome an otherwise insurmountable obstacle.

You haven't been consistently uncovering your prospect's real budget for your solution. Therefore, your quote may be for either too much or too little money. Your limited knowledge of what it will take to sell your prospects cause many proposals and quotes to be rejected and the sell cycle to take longer. It is imperative that you get your prospects to share their actual budgets and specifically, that part of their budget that is earmarked for you.

## Confidential Evaluation for Jane Smith

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 have been unable to consistently determine why your prospect would buy from you and not your competition. This happens when you give them your reasons instead of asking for theirs. Understand the importance of hearing those reasons from your prospects and develop questions that will assist you. When implemented, you will have much more leverage over your competitors.

You have a tendency to make assumptions on sales calls and while you may be very perceptive, salespeople that depend on their hunches are often wrong! There is no information like factual information. If you find yourself assuming, remember that the odds of being right are slight. If you must assume, please assume out loud and let your prospect correct you.

You have recognized that the amount of time you spend with prospects that don't buy is much too great. This is very discouraging, often demotivating and very costly. It can often be the result of an inability to get in front of final decision-makers, get the real budgets or get commitments. When you implement a more effective selling system it will significantly cut down on wasted time. Until then, you should be more selective with your time.

You are making a fair share of proposals (or quotes) and while it's nice when you win the business, most proposals aren't selected. 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 out a proposal.

Confidential Evaluation for Jane Smith

<b>SUMMARY OF CHALLENGES YOU MAY ENCOUNTER</b>		
<b>Findings</b>	<b>Core Competency</b>	<b>Notes</b>
Accepting PutOffs	8	
Too Many Inappropriate Follow Up Calls	8	
Likely to be Ineffective With Prospects That Wish To Comparison Shop	11	
Making Inappropriate Presentations	11	
Not Getting Enough Referrals	12	
Not Finding Out How Prospects Will Make Decision to Buy	13	
Not Able to Control the Selling Process	14	
The Games and Lies Prospects Use	14	
Not Handling People Effectively	15	
Not Uncovering the Actual Budget	16	
Wasting Time for Lack of Effective Selling System	17	
Not Finding Out Why Prospects Would Buy	17	
Assuming Too Often	17	
Wasting Time With Wrong Prospects	18	
Too Many Inappropriate Quotes or Proposals	18	
Sell Cycle Taking Too Long	18	

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? Here they are:

**BROKEN RECORDS RELATED TO SALES SITUATIONS**

<b>SALES SELF-LIMITING RECORDS</b>	
<b>Findings</b>	<b>Notes</b>
It's OK if my prospect shops around	
I must educate my prospect	
I have a long sell cycle	
Prospects are honest	
Prospects that think it over will eventually buy from me	
I should spend measurable time with prospects that don't buy from me	
I should tell my prospects why they should buy from me	
I should tell my prospects how to reach a decision	

**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.

### **TRAINING**

Based on the suggestions I've made on the previous pages, I'd like to recommend that you take some training. Based on four sessions per month, I believe you will benefit from at least 8 months of training.

### **SALESMIND**

If you would like to supplement your sales training with some fast, simple and powerful "self-help" we strongly recommend "Salesmind". This software application will help condition your subconscious mind to overcome some of the serious weaknesses we pointed out. We suggest that you listen to the programs listed in the order in which they are presented here:

- Not Being Goal Oriented

**PIPELINE**

The following information comes from the pipeline inputs you provided. You will find a summary of your responses followed by the score for each opportunity you entered. The maximum pipeline score is 70 points. A checkmark indicates that you answered yes to the respective question.

As a general rule, the potential to close a pipeline opportunity with a score of 50% or below is considered weak. When the score is between 51% and 70% the open issues should really be addressed before attempting a close. An opportunity is considered strong when the pipeline score is above 70%.

Question	Company A	Company B
1	✓	✓
2		
3	✓	✓
4	✓	✓
5	✓	
6	✓	✓
7	✓	
8	✓	
9		
10		✓
11	✓	
12	✓	
13	✓	✓
14		
15		
16		
17	✓	
18	✓	✓
19	✓	✓
<b>Total Points</b>	<b>44</b>	<b>30</b>
<b>Max Points</b>	<b>70</b>	<b>70</b>
<b>Percent</b>	<b>63%</b>	<b>43%</b>

Your average score for 2 companies is 53% of the maximum points. Overall we find that your pipeline is not in the best position for closing.

For your reference on the next page we have included the questions used to review your pipeline.

**PIPELINE QUESTIONS**

<b>Item</b>	<b>Pipeline Question</b>
1	This quote is for the final decision maker
2	Decision promised upon delivery of quote
3	I am prepared for the unexpected
4	It will be profitable at your estimated cost
5	The prospective customer is creditworthy
6	We want this business
7	It won't upset any existing customers
8	There are no potential headaches
9	They have agreed to buy from us
10	They are committed to buying from someone
11	They have the money/funding
12	They know about how much it will cost
13	I've dealt with competitive issues if any
14	There is an incumbent vendor
15	There is dissatisfaction with the incumbent vendor (answer yes if no incumbent)
16	They said they'd leave the incumbent (answer yes if no incumbent)
17	The time frame is appropriate
18	They don't need competitive quotes
19	Our product/service will solve their problem

## **WHAT THE GROW CHART MEANS**

As you recall, you learned about and rated yourself on the ingredients that are important for success in sales. 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. It also helps to indicate whether you are motivated to earn additional income. Lack of desire is often responsible when a salesperson avoids unpleasant activities.

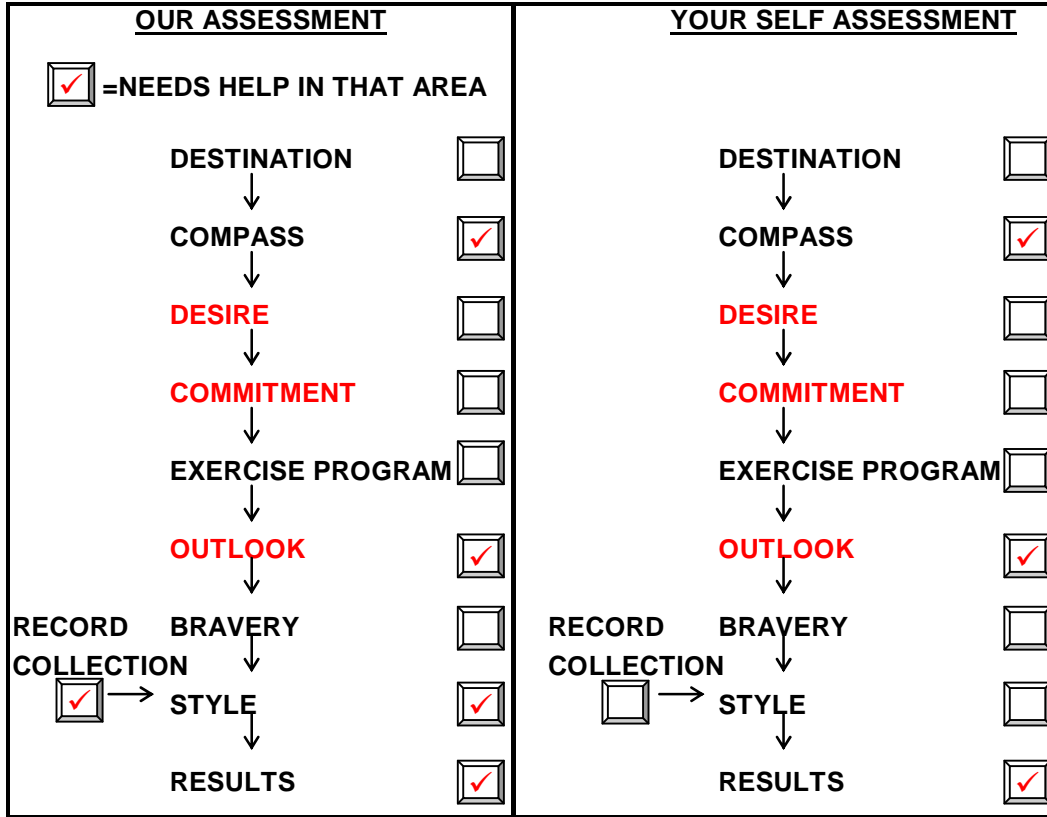
If I indicated that you lack desire you can look to your destination and compass for help. Destination tells us whether you have clear, exciting personal dreams and goals and compass indicates whether or not you are on track to reach them by the desired date. If the destination is not established then it may explain why desire isn't very strong. Desire improves when a salesperson gets excited about a clear destination and recognizes that he can fulfill that dream using his sales 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 selling process and execute both new and old techniques.

A committed salesperson with a strong desire for 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:  $\text{Desire} + \text{Commitment} = \text{Effort}$ . Consistent effort over time = results.

**ASSESSMENT OF YOUR 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 GROW CHART FINDINGS**

		<b>DESTINATION</b>			<b>COMPASS</b>
✓		Has Goals	✓		Has a Goals Management Plan
✓		Has Them In Writing		✓	Has a Tracking System
✓		Has An “Accomplish By” Date			
		<b>DESIRE</b>			<b>COMMITMENT</b>
✓		Has enough Desire to Make Changes	✓		Has enough Commitment to Make Changes
		<b>OUTLOOK</b>			<b>BRAVERY</b>
	✓	Has a Good Outlook	✓		Has Overcome the Need for Approval
			✓		Recovers from Rejection
			✓		Has Control of Emotions
		<b>EXERCISE PROGRAM</b>			<b>STYLE</b>
✓		Will Prospect	✓		Quickly Develops Bonding and Rapport
✓		Prospects Consistently		✓	Has & Uses an Effective Selling System
✓		Consistently Reaches Decision Makers		✓	Effective When Asking Questions
✓		Gets Appointments		✓	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.

**RESULTS** – The bottom-line.

**CORE COMPETENCY REFERENCE**

The core competency numbers are used in the Strength, Skill, Weakness and Challenges sections of the assessment. Using the core competency number you can look up the title of the competency to the right.

<b>Core Competency List</b>	
<b>Number</b>	<b>Title</b>
<b>1</b>	Has Written Goals
<b>2</b>	Follows Written Goals With a Plan
<b>3</b>	Has Positive Attitude
<b>4</b>	Takes Responsibility
<b>5</b>	Strong Self-Confidence
<b>6</b>	Supporting Record Collection
<b>7</b>	Controls Emotions
<b>8</b>	Doesn't Need Approval
<b>9</b>	Recovers From Rejection
<b>10</b>	Comfortable Talking About Money
<b>11</b>	Supportive Buy Cycle
<b>12</b>	Consistent Effective Prospecting
<b>13</b>	Reaches Decision Makers
<b>14</b>	Effective Listening and Questioning
<b>15</b>	Early Bonding and Rapport
<b>16</b>	Uncovering Actual Budgets
<b>17</b>	Discovering Why Prospects Buy
<b>18</b>	Qualifies Proposals and Quotes
<b>19</b>	Gets Commitments and Decisions
<b>20</b>	Strong Desire for Success
<b>21</b>	Strong Commitment for Success

**MY PERSONAL ACTION PLAN**

Name \_\_\_\_\_ Date \_\_\_\_\_

Now that you have had an opportunity to read and review your assessment, the next step in this process is to begin to develop your skills and overcome your weaknesses. Depending on your circumstances, your company may provide formal training and coaching or, if you pursued this evaluation on your own, you may elect to fund that step personally. Either way, it is important for you to identify what you believe are the most important areas for you to address, commit to self-improvement, and have a plan for success. When you have completed this page, please return this to your manager.

In the space provided below, please identify three weaknesses that you believe are essential to overcome in the coming months.

Weakness	Its Impact on Performance	Your Plan for Improvement
----------	---------------------------	---------------------------

Confidential Evaluation for Jane Smith

In the space provided below, please identify three skills that you believe are essential for you to develop over the coming months. Refer to “Likely Problems” for the complete list of skills you must develop.

Likely Problem	Its Impact on Performance	Your Plan for Improvement
----------------	---------------------------	---------------------------

Confidential Evaluation for Jane Smith

Did you identify any Self-Limiting Records that are crucial for you to overcome?

Finally, as a result of this assessment, what did you learn about yourself?

---

Signature

Date

## COMMENTS AND QUESTIONS

If you are like most assessment participants, you probably have a question or two, along with some comments. This page provides a formal opportunity to get them answered and addressed. Simply complete this page and return it to your manager.

First, if there were any findings that you did not understand, use this section to get clarification:

Page	Finding	I Didn't Understand
------	---------	---------------------

Next, if there were any findings that you did not agree with, use this section to let us know.

Page	Finding	Why I Don't Agree	What I Would Do About it if it Was True
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Finally, if you have a comment or suggestion that you would like us to know about, please feel free to write it here:

Name \_\_\_\_\_ Date \_\_\_\_\_

Company \_\_\_\_\_

**STRENGTH AND WEAKNESS SUMMARY**

**THE DAVE KURLAN SALES FORCE PROFILE™**

**Evaluation of:** Jane Smith  
**Company:** Sample Corporation  
**Date:** 10-Jul-2007  
Evaluated By: Dave Kurlan

**These strengths support the selling process**

Has Written Personal Goals  
Has a Written Plan for Reaching Personal Goals  
Takes Responsibility for any Lack of Results (No Excuses)  
Good Self Image  
Enjoys Selling  
Seldom Loses Control of Emotions  
Slight Need For Approval  
Rejection Proof  
Able to Talk About Money  
High Money Tolerance  
A Decision Maker  
Capable of Upholding Margins  
Has a Supportive Buy Cycle  
Will Prospect and Does Prospect Consistently  
A Strong Desire  
A Strong Commitment

**Jane has developed these selling skills**

Good Time and Organizational Ability  
Able to Get Appointments When Prospecting  
Able to Get Past Gatekeepers  
Will Prospect and Does Prospect Consistently  
Consistently Gets to Decision-Makers  
Develops Bonding and Rapport Early in the Process  
Gets Prospects to Make Decisions

**These weaknesses may neutralize those strengths and skills**

No System for Tracking Progress  
Has Outlook Problem  
Self Limiting Record Collection  
Too Trusting of Prospects  
Not Motivated To Earn More Money

**Jane is vulnerable to these selling situations or events**

Accepting PutOffs  
Too Many Inappropriate Follow Up Calls  
Likely to be Ineffective With Prospects That Wish To Comparison Shop  
Making Inappropriate Presentations  
Not Getting Enough Referrals  
Not Finding Out How Prospects Will Make Decision to Buy  
Not Able to Control the Selling Process  
The Games and Lies Prospects Use  
Not Handling People Effectively  
Not Uncovering the Actual Budget  
Wasting Time for Lack of Effective Selling System  
Not Finding Out Why Prospects Would Buy  
Assuming Too Often  
Wasting Time With Wrong Prospects  
Too Many Inappropriate Quotes or Proposals  
Sell Cycle Taking Too Long

**Jane's record collection contains these self limiting records**

It's OK if my prospect shops around  
I must educate my prospect  
I have a long sell cycle  
Prospects are honest  
Prospects that think it over will eventually buy from me  
I should spend measurable time with prospects that don't buy from me  
I should tell my prospects why they should buy from me  
I should tell my prospects how to reach a decision

**PERFORMANCE RELATED INFORMATION**

Jane was asked eight questions related to Jane's specific selling activity. Below is the summary of Jane's answers. The questions asked for answers specific to the previous 12 months of selling activity.

<b>Item</b>	<b>Question</b>	<b>Response</b>
<b>1</b>	The percentage of my sales that come as a result of somebody calling/contacting me is	Less than 25%
<b>2</b>	The percentage of my sales that come from my existing customers/clients is	Less than 25%
<b>3</b>	My performance to quota has been	I don't have a quota
<b>4</b>	How many first appointments for new opportunities did you have (include those you did not close)?	12
<b>5</b>	What is the dollar (\$US) value of your typical new opportunity?	20000
<b>6</b>	Of your closed deals / accounts, how many did you discount?	5
<b>7</b>	What was the typical discount (percentage points)?	5
<b>8</b>	How many NEW deals or accounts did you close?	8