

# Sales Performance Pulse

for: Sample Company

Sales Team Assessment

2/21/2023

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# About This Report

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This multi-rater feedback process is designed to reveal strengths and weaknesses in sales teams. When used effectively, the survey can:

- Encourage candid and honest communication between you and your colleagues
- Help you identify sales strengths and developmental opportunities
- Establish a quantitative baseline that will assess sales proficiency
- Help you identify the developmental needs of your sales people to improve sales performance

## Rating Scale

The rating scale shown below was used in scoring quantitative feedback.

Scale Option	Assigned Value
Not Observed	---
Strongly Disagree	1
Disagree	2
Somewhat Disagree	3
Somewhat Agree	4
Agree	5
Strongly Agree	6

## Response Summary

The following groups of individuals were invited to participate in this review. The "Nominated" rater count excludes individuals that opted-out of participating or were removed by project administrators.

Rater Type	Nominated	Responded	Response Rate
Sales Director	1	1	100%
Sales Manager	1	1	100%
Employee	3	3	100%
Total	5	5	100%

## Raters Nominated to Participate

The individuals listed below were nominated to provide you feedback.

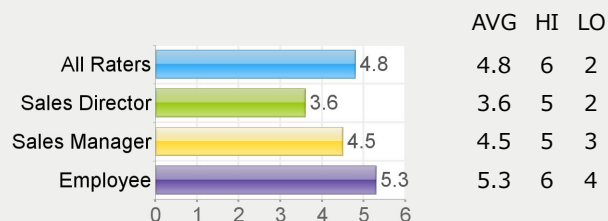
#	Rater Name	Rater Relationship
1.	Brown, Doug	Sales Director
2.	Antolec, Kelli	Sales Manager
3.	Anderson, Mark	Employee
4.	Crisafulli, Carol	Employee
5.	Wilson, Elizebeth	Employee

# Team Competency Summary

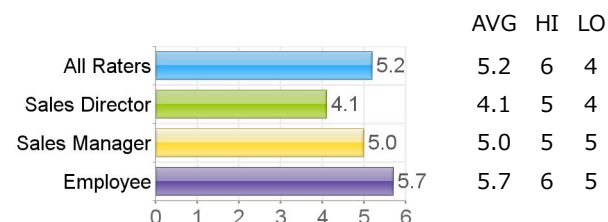
This report shows average ratings for each competency in the review segmented by rater group. The HI and LO columns present the highest and lowest ratings submitted by each rater group for a given competency. The "All Raters" bar represents the average of all non-self raters in your review.

## Overall Score: 4.8 out of 6

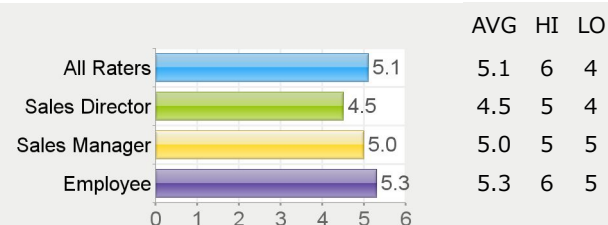
Aggregate score for all competencies in the review.



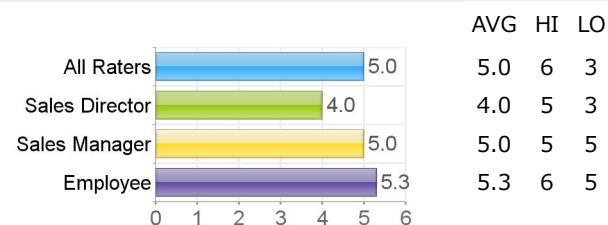
## Penetrating Territories and Accounts



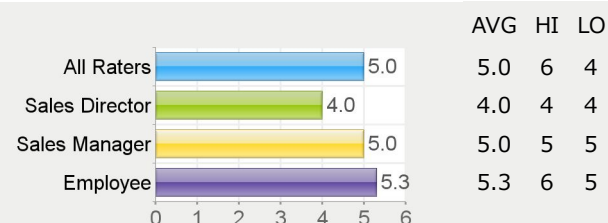
## Sales Cycle – Closing



## Customer Focus

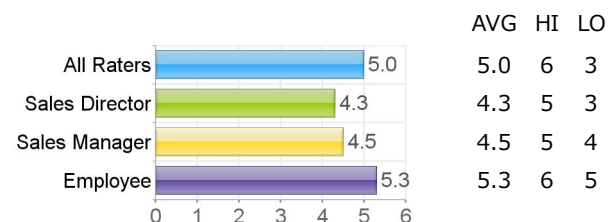


## Teamwork and Collaboration



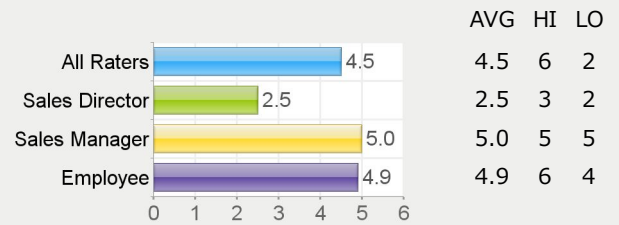
## Relationship Building

Team members...

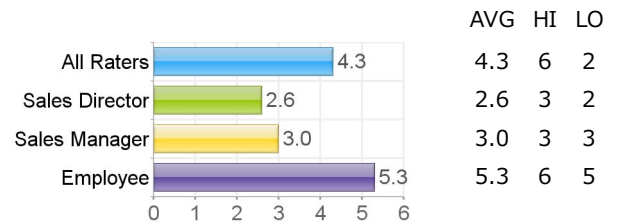


# Team Competency Summary (continued)

## Activity Management

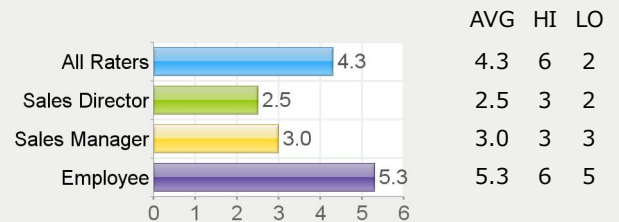


## Business Acumen



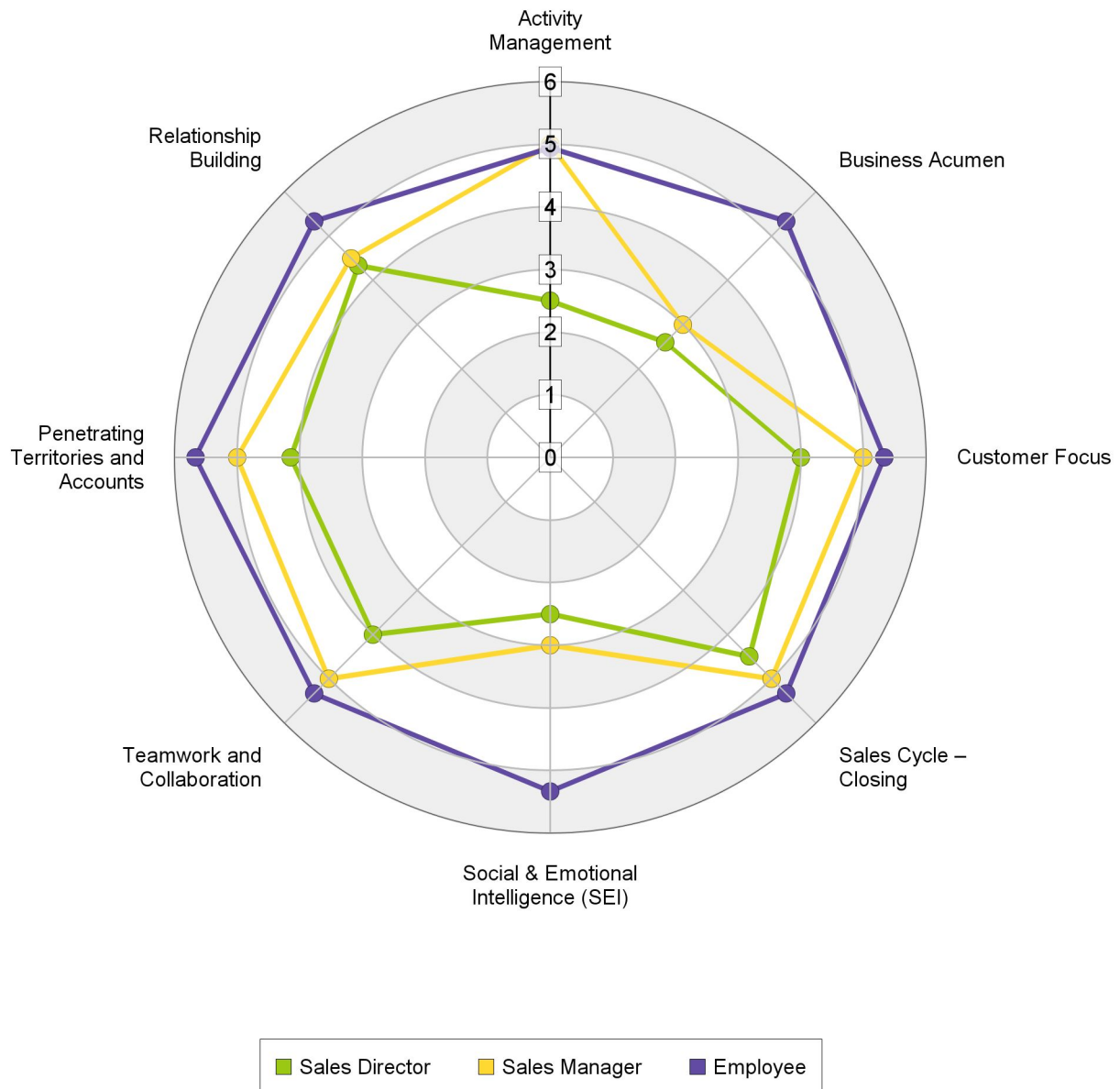
## Social & Emotional Intelligence (SEI)

Team members...



# Competency Profile Radar Chart

The Competency Profile radar chart below shows scores for each rating group across competencies. Radar charts are useful in easily spotting gaps between rater group's perceptions and observation of the sales team. More favourable scores fall towards the outside of the chart.



# Rank Team Competencies

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**Rank Team Competencies: Rank the competencies for your team from strongest to weakest**

Choice Value	Average Rank	Num. Responses	Highest Rank	Lowest Rank
Penetrating Territories and Accounts	1.6	5	1	3
Sales cycle- Closing	2.4	5	1	3
Relationship Building	3.0	5	1	5
Customer focus	3.2	5	2	4
Teamwork and collaboration	5.0	5	4	6
Activity management	6.8	5	5	8
Business acumen	7.0	5	6	8
Social and Emotional Intelligence	7.0	5	6	8

# Assessment Results Highest and Lowest Rated Behaviors

This report shows average ratings for each of the 15 highest rated behaviors followed by 15 of the lowest rated behaviors.

	All Raters	Sales Director	Sales Manager	Employee
1. <b>Penetrating Territories and Accounts</b> Develop and execute a plan for each individual account	5.4	5.0	5.0	5.7
2. <b>Penetrating Territories and Accounts</b> Plan and fulfill complex and global roll-outs	5.3	4.0	0.0	5.7
3. <b>Penetrating Territories and Accounts</b> Build relationships of personal trust and loyalty at several levels within customer organizations	5.3	4.0	0.0	5.7
4. <b>Customer Focus</b> Actively listens to the customers' business needs	5.2	5.0	5.0	5.3
5. <b>Sales Cycle – Closing</b> Understand the customer's purchase and procurement process	5.2	5.0	5.0	5.3
6. <b>Sales Cycle – Closing</b> Create an implementation plan	5.2	5.0	5.0	5.3
7. <b>Sales Cycle – Closing</b> Negotiate the final terms and get the contract signed	5.2	5.0	5.0	5.3
8. <b>Penetrating Territories and Accounts</b> Use effective process, tools, and technique for successful account planning	5.2	4.0	5.0	5.7
9. <b>Penetrating Territories and Accounts</b> Identify key customer initiatives that translate into the company's growth opportunities that achieve customer satisfaction	5.2	4.0	5.0	5.7
10. <b>Penetrating Territories and Accounts</b> Through effective planning, task prioritization and organizational skills, maximize customer face time while minimizing non-customer interfacing activities	5.2	4.0	5.0	5.7
11. <b>Penetrating Territories and Accounts</b> Effectively apply go-to-market strategies to build and maintain customer relationships	5.2	4.0	5.0	5.7

12. <b>Relationship Building</b> Follow through on commitments and speak candidly in ways that create connections	<b>5.2</b>	5.0	5.0	5.3
13. <b>Relationship Building</b> Contribute to others in ways that facilitate trust	<b>5.2</b>	5.0	5.0	5.3
14. <b>Customer Focus</b> Identify current state, ideal state, and pathways for customers	<b>5.0</b>	4.0	5.0	5.3
15. <b>Customer Focus</b> Give priority to meeting customer expectations and effectively balancing aspects of quality, cost, and timeliness of service	<b>5.0</b>	4.0	5.0	5.3

# Assessment Results Highest and Lowest Rated Behaviors

This report shows average ratings for each of the 15 highest rated behaviors followed by 15 of the lowest rated behaviors.

	All Raters	Sales Director	Sales Manager	Employee
1. <b>Activity Management</b> Set standards and goals for the key sales activities associated with achieving revenue and profitability numbers	3.8	2.0	5.0	4.0
2. <b>Business Acumen</b> Demonstrate a firm understanding of customers' industries, business performance and key competition sufficient to discuss strategic alternatives to attain clients' business objectives	4.2	2.0	3.0	5.3
3. <b>Business Acumen</b> Understand how to provoke 'thought leadership' discussions with client executives in response to satisfying identified customer business initiatives	4.2	2.0	3.0	5.3
4. <b>Social &amp; Emotional Intelligence (SEI)</b> Comprehend the emotions, intentions, motivations, and concerns of others	4.2	2.0	3.0	5.3
5. <b>Social &amp; Emotional Intelligence (SEI)</b> Readily admit mistakes	4.2	2.0	3.0	5.3
6. <b>Social &amp; Emotional Intelligence (SEI)</b> Use emotions to improve decision making and instill a sense of trust and cooperation in others	4.2	2.0	3.0	5.3
7. <b>Activity Management</b> Keep track of daily, weekly, and monthly activities for each step in the sales cycle: cold calls, dials, contacts, emails, first sales meeting, follow-up meetings, RFPs, proposals, and sales	4.4	3.0	5.0	4.7
8. <b>Business Acumen</b> Understand and can use basic financial concepts and terms, and have a basic understanding of accounting, including profit & loss, balance sheets, cash flow, and gross profit, etc.	4.4	3.0	3.0	5.3

9. <b>Business Acumen</b> Understand how businesses make money, and what are their key drivers of profitability	<b>4.4</b>	3.0	3.0	5.3
10. <b>Business Acumen</b> Identify and meet customer needs and buying criteria based on offering solutions that meet the customer's business requirements	<b>4.4</b>	3.0	3.0	5.3
11. <b>Social &amp; Emotional Intelligence (SEI)</b> Listen attentively and demonstrate empathy	<b>4.4</b>	3.0	3.0	5.3
12. <b>Social &amp; Emotional Intelligence (SEI)</b> Build emotional rapport	<b>4.4</b>	3.0	3.0	5.3
13. <b>Social &amp; Emotional Intelligence (SEI)</b> Are aware of their emotional reactions and use that awareness to improve relationships and team performance	<b>4.4</b>	3.0	3.0	5.3
14. <b>Activity Management</b> Use CRM to track account activity	<b>4.6</b>	2.0	5.0	5.3
15. <b>Activity Management</b> Use pipeline management to monitor key activity and sales metrics to manage activity and drive results	<b>4.6</b>	3.0	5.0	5.0

# Open-ended Comments

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All respondents were asked to provide open-minded commentary on competencies. The comments below are segmented by questions and are presented exactly as they were entered by the respondent

## Business Acumen: Comments

Sales Director

Our salespeople need to better understand the competitive environment and financials.

Sales Manager

The team has a great sense of what they need to do for their specific role, but have opportunity to learn more about the business as a whole.

## Customer Focus: Comments

Sales Director

Our salespeople need a better long-term focus.

Sales Manager

The team is strong in this area - always room for improvement.

## Sales Cycle – Closing: Comments

Sales Manager

The team is strong here, always room for improvement.

## Social & Emotional Intelligence (SEI): Comments

Sales Manager

The team has a foundational knowledge in these areas, room for improvement.

## Teamwork and Collaboration: Comments

Sales Manager

Team is great at this - always room for improvement.

## Penetrating Territories and Accounts: Comments

Sales Manager

The team has a good handle on this topic - especially since they've had to develop a lot of these skills

themselves. Definitely room for improvement.

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## Relationship Building: Comments

Sales Manager

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Some areas are weaker than others, but overall they have a good handle on relationships.

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# Sales Development Opportunities

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Based on the results of this competency survey, below is information related to improving the 3 competencies with the lowest average rating.

## Activity Management

Human Emergence Group

Activity Management was one of the three weakest sales competencies for your organization as indicated in the Sales Performance Pulse. Activity Management is defined as: Sets activity goals and tracks key sales activities and tasks to maximize productivity and achieve results. What follows are the behaviors assessed, the potential consequences, costs of weakness, and recommendations on how to improve activity management.

### Below are the Behaviors That Were Assessed in Activity Management

Salespeople...

- Keep track of daily, weekly, and monthly activities for each step in the sales cycle: cold calls, dials, contacts, emails, first sales meeting, follow-up meetings, RFPs, proposals, and sales
- Use CRM to track account activity
- Calculate key activity metrics and the dollar benefit of key activities such as dials, meetings, and proposals
- Set standards and goals for the key sales activities associated with achieving revenue and profitability numbers
- Use pipeline management to monitor key activity and sales metrics to manage activity and drive results
- Challenge others to use activity management to increase productivity and results

### Possible Symptoms of Weakness in Activity Management

Weakness in Activity Management can show up in multiple ways. Some of the ways that this might show up are as follows:

Salespeople...

- Seldom or inaccurately track key activities and tasks
- Do not set activity goals to drive sales cycle results, or track key sales activities using CRM
- Do not view activity management as a key discipline and aid to successful sales
- Fail to use pipeline management to monitor key activity and sales metrics to manage activity and drive results

### Potential Consequences of Weakness in Activity Management

Some of the following consequences of weak Activity Management may apply:

- Less sales activity resulting in lower sales
- Less effective sales management and training, because there is less information to identify sales problems and skill gaps
- A culture that avoids accountability
- A culture where mediocre sales activity is tolerated

### Recommendations for Activity Management

The following are examples of steps you might take to improve the competency of Activity Management with your team.

- Identify which behaviors in activity management most need to be improved
- Investigate and analyze the causes of weak activity management, and design actions to improve it based on those causes
- Take time to communicate what excellent activity management looks like
- Explore potential changes in processes that will enhance activity management

- Include the behaviors associated with activity management in the annual performance review process
- Create or include in an individual development plan for each employee how they want to improve, and what actions they will take to improve their proficiency in activity management
- Put a plan/process in place for sales managers to work together to improve activity management on their teams
- Create an initiative to help salespeople focus on the behaviors that demonstrate activity management
- Provide and celebrate examples of exemplary behaviors that demonstrate activity management
- Bring salespeople together to discuss activity management and collaboratively determine their own action steps to improve it
- Create contests and games that focus on different aspects of activity management
- Coach salespeople individually on their activity management

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## Business Acumen

Human Emergence Group

Business Acumen was one of the three weakest sales competencies for your organization as indicated in the Sales Performance Pulse. Business Acumen is defined as: Uses understanding of business to drive sales results. What follows are the behaviors assessed, the potential consequences, costs of weakness, and recommendations on how to improve business acumen.

### Below are the Behaviors That Were Assessed in Business Acumen

Salespeople...

- Understand the key financial issues and challenges facing customers and how the firm's products and services can benefit the customer
- Understand how businesses make money, and what are their key drivers of profitability
- Demonstrate a firm understanding of customers' industries, business performance and key competition sufficient to discuss strategic options and solutions to attain clients' business objectives
- Provoke "thought leadership" discussions with client executives related to customer business initiatives
- Identify and meet customer needs and buying criteria by offering solutions that meet the customer's business requirements

### Possible Symptoms of Weakness in Business Acumen

Weakness in Business Acumen can show up in multiple ways. Some of the ways that this might show up are as follows:

Salespeople...

- Have a weak understanding of business
- Do not understand (or attempt to understand) the financials of their customers and prospects
- Don't really understand how their customers make money
- Do not understand the real customer issues and their consequences to the customer
- Lack the ability to propose strategic solutions to meet customers' business objectives
- Don't learn the industry dynamics relevant to customers' businesses
- Fail to engage in "thought leadership" discussions with client executives, reducing influence with the client

### Potential Consequences of Weakness in Business Acumen

Some of the following consequences of weak Business Acumen may apply:

- Loss of confidence from customers
- Opportunities missed

- Fewer sales
- Poor decisions

## Recommendations for Business Acumen

The following are examples of steps you might take to improve the competency of Business Acumen with your team.

- Perform research and ask probing questions to understand customers' businesses
- Model, lead, and mentor others to be excellent in business acumen
- Put oneself in the shoes of the customer in order to understand what is important to them
- Learn lessons from past deals and contribute those lessons to business strategy
- Network, attend conferences, and read to keep current with industry, economic, demographic, and community innovations and trends
- Identify which behaviors in business acumen most need to be improved
- Investigate and analyze the causes of weak business acumen, and design actions to improve it based on those causes
- Take time to communicate what excellent business acumen looks like
- Explore potential changes in processes that will enhance business acumen
- Include the behaviors associated with business acumen in the annual performance review process
- Create or include in an individual development plan for each employee how they want to improve, and what actions they will take to improve their proficiency in business acumen
- Put a plan/process in place for sales managers to work together to improve business acumen on their teams
- Create an initiative to help salespeople focus on the behaviors that demonstrate business acumen
- Provide and celebrate examples of exemplary behaviors that demonstrate business acumen
- Bring salespeople together to discuss business acumen and collaboratively determine their own action steps to improve it
- Create contests and games that focus on different aspects of business acumen
- Coach salespeople individually on their business acumen

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## Social Emotional Intelligence (SEI)

Human Emergence Group

SEI was one of the three weakest team competencies for your organization as indicated in the team assessment. SEI is defined as: Team members comprehend intentions, motivations, concerns, and emotions in themselves and others and effectively use that awareness. What follows are the behaviors assessed, along with the potential consequences, costs of weakness, and recommendations on how to improve SEI.

### Below are the Behaviors That Were Assessed in SEI

Team members...

- Listen attentively and demonstrate empathy
- Build emotional rapport
- Comprehend the emotions, intentions, motivations, and concerns of others
- Readily admit mistakes
- Use emotions to improve decision making and instill a sense of trust and cooperation in others

- Are aware of their emotional reactions and use that awareness to improve relationships and team performance

### Possible Symptoms of Weakness in SEI

Weakness in the competency of SEI can show up in numerous different ways. Some of the ways that weaknesses might show up are as follows:

Team members...

- Are often distracted and aloof
- Don't take the time to get to know their colleagues on a personal level
- Misunderstand or disregard another person's emotional reactions and motivations
- Finger-point and deny when mistakes are made
- Ignore their gut instincts and rely on rote answers
- Are blind to their internal emotional state and relate to others in a transactional or robotic manner

### Potential Consequences of Weakness in SEI

Depending on the function and purpose of the team, some of the following consequences of weak SEI may apply:

- Transactional relationships
- Team cohesion suffers
- Poor relationships between team members and leadership
- Team members don't take ownership of issues or errors
- Team members are not fully engaged with their teammates nor dedicated to team outcomes
- Individuals do not feel included in their team, nor are invested in the organization

### Recommendations for Improving SEI

What follows are examples of steps you might take to improve the competency of SEI for your team.

- Identify which behaviors in SEI most need to be improved
- Investigate and analyze the causes of low SEI on the team, and design actions based on those causes
- Take time to communicate what SEI might look like on a team, how it aligns with the organization's values, and how it serves the team and its members
- Ensure that team members understand internal and external customer needs and pain points
- Explore potential changes in processes that will enhance SEI
- Include the behaviors associated with SEI in the annual performance review process
- Create or include in an individual development plan for each employee how they want to improve, and what actions they will take to improve their proficiency in SEI
- Put a plan/process in place for team managers to work together to improve SEI in their teams
- Create an initiative to help employees focus on that behavior

- Provide and celebrate examples of exemplary behaviors that demonstrate SEI
  - Bring the team together to discuss SEI and collaboratively come up with their own action steps to improve it
-