



MARINE DEALER
CONFERENCE & EXPO® 2018

Assess, Develop and Coach Your Sales Team

By:

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Team@Work

The Top 7 Things to Consider When Using a Sales Assessment Tool

Sales assessments are tremendous tools that will assist in validating final candidates for Sales Positions on your team. A sales assessment should only be administered to the two or three finalists for the sales job. The sales assessment should be the final item added to the interviews and meetings previously completed.

A sales assessment should provide you with the following key elements for considering the candidates.

1. **SW Analysis:** Understanding the candidate's strengths and weaknesses
2. **Personality:** Knowing the level of assertiveness and stamina
3. **Work Tendencies:** How adept is the sales person to prospecting and cold calling?
4. **Supervision:** What do the candidates need for direction and supervision?
5. **Motivation:** How responsive is the candidate to incentives and commission. What are their driving factors?
6. **Time Management:** Is the candidate able to self-manage time and displays organizational skills?
7. **Teamwork:** How does the candidate get along with other team members?

Sales Assessment Sample



Team@Work Sales AIR (Assessing, Interviewing, Recruiting)

Applicant Name: Mike Smith
Test Date: 7/31/2012 4:47:44 PM
Job Name: Sales
Suitability Rating: NA (NA)

Company: Team@Work
Recruiter: Ty Bello

BRIEF DESCRIPTION

Recruiter Note: Candidate's personality traits are not very obvious. Perfectionistic, detail oriented, fussy. Very patient, unhurried, methodical, deliberate, calm. Conservative, careful, risk averse, security oriented. Routine oriented, reactive, passive. Non-assertive, a specialist, assertive within specialty. Very structured, likes procedures, guidelines, by the book type. Task oriented, numbers, specifics, analytical, technical, problem solver. Reserved, skeptical, hands-on, work oriented. Formal, polite, serious, no nonsense, very disciplined, very logical. Prone to analysis-paralysis, procrastination.

MOST SUITABLE SALES POSITIONS

Technical, structured, established customer base, consultative, retail type, order desk.

LEAST SUITABLE SALES POSITIONS

Requiring high assertiveness, closing/prospecting oriented, unstructured, incentive based.

STRENGTHS

Organized/well prepared, hard working, follows up well, reliable, conscientious.

WEAKNESSES

Prospecting, closing, overly detailed/structured, reserved/people orientation, passive, procrastination.



Team@Work Sales AIR (Assessing, Interviewing, Recruiting)

PERSONALITY TRAITS

Assertiveness



Low assertiveness, some assertiveness within parameters of training and guidelines, needs support/guidance/direction, loyal, conscientious, team player.

Sociability



Introverted, task oriented, skeptical, technically oriented, analytical, quite shy with new contacts, formal and factual communicator, serious, no-nonsense.

Patience



Very patient, tolerant, methodical, calm, passive, unhurried, reactive, self-paced, likes routine, deliberate, likes predictability, dislikes change.

Dependence



Very structured, a fear of failure, needs rules/procedures/guidelines, needs to be 'right', security oriented, risk averse, conservative, compliant, co-operative.

Emotional Control



Very logical and very disciplined. Analytical. Very conservative but well thought out decisions. Prone to analysis-paralysis, procrastination.

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Stamina



This person has an above average energy capacity, which means that he/she is capable of investing normal hours, and if he/she decides to do so, extra hours in his/her work without difficulty.

WORK TENDENCIES

Prospecting



Lacks the assertiveness and people orientation found in successful prospectors.

Closing



Lacks the risk orientation and the assertiveness found in successful closers.

Organization/Attention to Detail



Very organized. Very detail oriented. Perfectionistic. Accurate. Thorough, Fussy.

Response to incentives/commissions



Risk averse. Conservative. Responds best to guaranteed compensation systems. Lacks the risk orientation found in most successful commission oriented sales types.

Team@Work Sales AIR (Assessing, Interviewing, Recruiting)

Need for Direction



Need for direction is quite high. Needs the structure of procedures and guidelines initially. Operates comfortably within parameters of training/guidelines/experience.

Turnover Propensity



Not prone to job turnover (job-hopping).

DETAILED DESCRIPTION

Recruiter Note: Candidate's traits are not very obvious; i.e. are present in small amounts. This is a very perfectionistic, very reserved person with a low level of assertiveness and a high degree of patience. He/she is motivated by a strong fear of failure and will take a careful, thorough and craftsman-like approach to his/her work. He/she is most closely suited to sales environments that are very structured and passive or reactive in style. As such sales activities that require a high level of assertiveness such as for prospecting and closing will be very difficult for this individual. Loyal and conscientious, he/she will seek direction and follow it closely. He/she is careful, cautious and conservative; definitely not a risk taker. He/she is a quiet, reserved and controlled person who will tend to communicate in a sincere, serious and formal manner. He/she will be professional and well prepared but may lack the 'persuasiveness' to appeal to the prospect's 'hot-buttons'. He/she may be work oriented, but will very likely devote too much energy to the administrative aspects of the position. This person has an above average energy capacity, which means that he/she is capable of investing normal hours, and if he/she decides to do so, extra hours in his/her work without difficulty. When working within the areas that define his/her training and expertise, and with procedures and guidelines as support, he/she may appear to be more assertive than he/she is. When dealing with routine or daily problems, that can be solved by precedent or policies, this individual may appear to be decisive, but without some form of authority or structure to serve as a backup, he/she will be much more hesitant to act. He/she will focus heavily on details and will tend to work well with numbers, facts or technical matters, and will prefer to take his/her time to do his/her work in a precise and meticulous manner. He/she is a very logical and very disciplined thinker, tending to emphasize his/her analytical and detail oriented style. Resulting in his/her decisions being very well researched and quite conservative. He/she can be prone to procrastination and analysis-paralysis. Provide him/her with clear parameters and guidelines and access to his/her manager. Put him/her in sales positions that need attention to details but enable him/her the time to focus on them. Communicate with this individual using facts, figures and specifics.

Team@Work Sales AIR (Assessing, Interviewing, Recruiting)

Pre-Hire (Interview areas, reference check areas, red flags/potential problems):

If the position needs people orientation, risk orientation or high assertiveness, address this. If the position is very deadline oriented and needs multi-tasking, address this. If the position requires a sense of urgency, address this.

Post-Hire (Areas to train, areas to develop, how to manage and motivate):

Make the position very structured and routine in nature and give him/her access to his/her boss. Focus the position on details and standards and give him/her time to work on them. He/she could be overly detailed and may be prone to procrastination, at times. Provide assistance if 'people-orientation' or assertiveness is necessary. Be aware of his/her tendencies toward procrastination.