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Select and Develop Top Performing Sales Professionals

Introducing SalesMax



BIGBY·HAVIS
& ASSOCIATES, INC., INTL.

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Presentation Topics

- ▶ What Is SalesMax?
- ▶ How Was It Developed?
- ▶ What Does It Measure?
- ▶ How Does It Work?
- ▶ What Does It Report?
- ▶ Return on Investment
- ▶ Consulting Implications
- ▶ SalesMax Summary

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What Is SalesMax?

- ▶ **Targeted assessment for professional sales candidates**
 - ▶ Focuses only on those factors most applicable to a consultative sales role
- ▶ **A comprehensive, web-based assessment tool designed to:**
 - ▶ *Selection Report* – identifies candidates who are most likely to achieve above average success in professional sales
 - ▶ *Developmental Report* – helps current employees to identify strengths and developmental areas and guides them in constructing a personal development plan to achieve success

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What Is SalesMax?

- ▶ **Provides information about:**
 - ▶ *Sales Personality* -- relatively stable characteristics that do not change easily over time
 - ▶ *Sales Knowledge* -- understanding of effective behaviors and strategies at key stages of the sales cycle
 - ▶ *Sales Motivations* -- personal motivators to help in managing and motivating the candidate

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How Was It Developed?

- ▶ Sales representatives from three participating organizations completed the preliminary survey
- ▶ Sales managers completed special performance ratings on each participant
- ▶ Analyzed relationship between survey responses and performance
- ▶ Validated the personality components and created a Success Profile

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What Does It Measure?

- ▶ **Eight personality characteristics:**
 - ▶ Energy
 - ▶ Sociability
 - ▶ Expressiveness
 - ▶ Resilience
 - ▶ Assertiveness
 - ▶ Follow Through
 - ▶ Optimism
 - ▶ Serious-Minded
- ▶ Scores on these characteristics are weighted to form the foundation of the Success Index

Relatively stable characteristics which impact sales behaviors. These do not change easily over time, even with training.

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What Does It Measure?

Sales Knowledge – scenario based

- ▶ Prospecting/Pre-qualifying
- ▶ First Meeting/Impressions
- ▶ Probing/Presenting
- ▶ Overcoming Objections
- ▶ Influencing/Convincing
- ▶ Closing

The understanding of effective strategies at key stages of the sales cycle.

Candidate results normed in relation to experienced, consultative sales representatives

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What Does It Measure?

Sales motivations - forced ranking

- ▶ Recognition/Attention
- ▶ Control
- ▶ Money
- ▶ Freedom
- ▶ Developing Expertise
- ▶ Affiliation
- ▶ Security/Stability
- ▶ Achievement

Candidate results indicate highest and lowest motivational areas

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How Does It Work?

The process is quick and easy

- ▶ Candidate agrees to a Statement of Informed Consent
- ▶ Completes the survey in about an hour
 - ▶ Internet
- ▶ System software scores the survey
- ▶ A report is produced immediately
 - ▶ Anywhere, anytime, with an Internet connection
 - ▶ Selection or development-oriented reports



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Selection Reports

Selection Reports Include:

- ▶ Graphic Profile
- ▶ Selection Advice
 - ▶ Potential Sales Success (probability of success)
 - ▶ Insights Into Assets and Potential Liabilities
- ▶ Interview Probes
- ▶ Management Suggestions



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Selection Advice

Potential Sales Success:

The candidate's Sales Personality Index score was 77 out of a possible score of 100. This score falls in the second range of possible scores (70). The research indicates that candidates with scores in this range have a moderate probability of achieving successful sales results. Of a total of 100 respondents with scores in this range, research indicates that 60% will be successful.

Score	Range	Advice
80-100	Aimed	
70-80	OK	
60-70	Watch	
50-60	Watch	
40-50	Watch	

Success Index – quickly gauge the candidate's sales potential

Personality Insights:

- The following potential strengths (S) and potential weaknesses (W) may help you to understand how the candidate's personality may impact his sales performance.
- The candidate has a confident sales presence.
 - The candidate is sensitive and friendly when conversing. The candidate is able to deal with most difficult, challenging or powerful customers and should be capable of making the sale.
 - The candidate is a people person who will enjoy most of the social aspects of making new clients or prospects and working with them in a sales role.
 - The candidate is cooperative by nature and willing to accommodate others in order to get along and meet their needs.
 - His energy level is substantially below that of typical salespeople and may be a significant shortcoming. This may lack a sense of urgency about getting things done quickly.
 - He may be considered less dependable about following through on his commitments than the best salespeople.

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Selection Interview & Reference Probes

Interview and Reference Probe Suggestions

The most critical of this report provide interview and reference probes for following up with strong sales information regarding the candidate's potential performance. For well-qualified applicants, suggest several questions to use in determining the candidate. Strong sales presence scores generated in further detail on the candidate's profile are available in the candidate's report.

For any area where the candidate scored outside of the desired range, Interview & Reference Probes are provided.

- Very Low Energy**
The candidate appears to have a much lower energy level than the typical sales professional. This may mean that he has difficulty handling a demanding work schedule or that the work "feels hard" and motivation often is difficult to achieve.
- Interview Probes:**
- During the interview, will he be able to handle a typical workload. Ask how the candidate has been able to handle his workload. Probe for evidence of effectiveness despite a demanding energy level.
 - Ask him to describe a situation where he had to complete a significant amount of work in a short period of time. What were the circumstances that led up to the event? What did he do to complete his assignment? How did he feel afterwards?
 - Ask several interview questions about work such as "In what types of situations are you most productive?" and "In what types of situations would you like to be most effective?" (Some of the answers may suggest that there are no work situations where he does not feel productive, but that is not always the case.)
 - The candidate is not a high language being the interview. Does the applicant struggle in language, such as through jargon, slow talking, or slow response?
- Reference Probe Questions:**
- When talking with references use the following types of questions:
- How does the candidate with other references in his ability to complete tasks on time?

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Selection Management Suggestions

Management Suggestions

The remainder of this report suggests ways to effectively manage the person, in some cases the management suggestion identifies a potential problem area in her personality results and recommends an approach for optimizing her effectiveness in the job. In other cases, her assessment was discussed and suggestions for how to best utilize her capabilities are highlighted.

Handling a Demanding Work Place: Her slow work pace may not be adequate in a fast-paced sales environment. Her inability to meet specific work goals and to be held accountable to meet them indicates a need to be effective. Ideally, it may be helpful to set some interim deadlines (deadlines) to ensure that she is making progress towards her goals. Further, her management covers or coverage may also be helpful in coaching her to use her strengths more effectively.

Improving Follow Through: She should be encouraged to assume more responsibility to follow through on her responsibilities. In coaching her, make sure that she has a clear understanding of what she has committed each by when. Finally, you need that you will give the salesperson the Company's time to use "Tuesday" for long-range activities, suggest that she set interim deadlines to make sure that she is progressing toward her goals. If she falls behind, hold her accountable and help her to find strategies to avoid the shortcomings for later.

Developing a More Positive Outlook (Overcoming Being Optimistic): Her tendency towards a negative or pessimistic outlook could interfere with her sales effectiveness. She may require more time and attention than most sales people in order to keep her spirits up. If so, we recommend that she be recognized and rewarded for being to keep her emotions in check and her working days of energy.

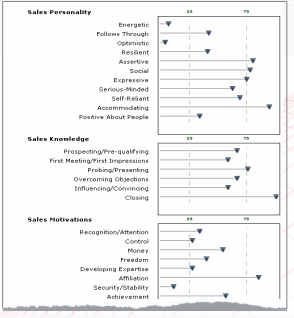
Management Suggestions provide guidance for potential problem areas.

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Development Reports

- Development Reports Include:
- Graphic Profile
 - Detailed Feedback
 - Developmental Suggestions
 - Action Plan Guidance



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Developmental Feedback

Profile Interpretation

Screen Format
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Personality Factors Linked to Sales Performance:

Your basic underlying personality may help (or) hinder (or) your effectiveness (or) do not manage certain characteristics:

- You may find it difficult to be confident that the typical successful salesperson. What is possible to compare to a clear and confident work pace to working smart or being more organized. She will often struggle with a slow work pace or a sluggish ability to progress in the area, we do however find that her responses provided in this report.
- You may be somewhat less dependent on following through on your commitments than the best salespeople. If that is the case, consider the learning "You Follow Through" might provide for you in this report.
- You appear to be very sensitive to your critics. This may be linked to being on her own more ready than most other sales professionals. To improve in this area, consider the suggestions provided under the heading of being More Optimistic later in this report.
- Her overall attitude about the experience that normally comes as part of sales, you should be able to assess both her disposition as an acceptable level. However, if you are unable to respond to the area, our Developmental Suggestions might provide some in this report.
- You have a confident sales presence and that confidence may be lacking. Asking for the sales generally should come ready for you.
- You are outgoing and social by nature. This is not to be confused with being very people and interacting with clients or customers.
- You are an expressive person who should have little difficulty conveying your thoughts and ideas to customers and others. You should have a clear and easy conversational style that can be spontaneous and enthusiastic.
- When it comes to your work, you are serious, hardworking, and professional. You generally take the time to make careful decisions and take only warranted risks.

Detailed feedback helps the employee recognize areas of strength and potential development needs.

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Developmental Suggestions

Improving Your Follow Through

Your response to the assessment suggest that, while you sometimes may be great, you may not always complete the tasks that you start or consistently deliver what you promise. It may be that you are unable to attend to your work or that you are not prepared to take the time to complete your tasks. Consider the following suggestions:

Activities:

Organizational skills can help you manage your productivity. Take 10 minutes at the end of each workday to take things to the manager to make a list of what you will be doing for the next day. Consider your calendar and time of day to help you plan.

Make sure that you are taking back of feedback. Do it regularly, your response to a personal digital assistant (PDA) is a ready-made example of regular feedback. Set alarm reminders to ensure that you are progressing activities that may be due to the future.

Make sure you are taking notes on what you do. You should be able to remember to take notes on the work you do and make sure to use it to record feedback for the future. Be sure to include how you feel about the work and what you are doing to improve your performance. You should be able to record how well you are doing. When you complete a job, make sure it is completed or completed, and you have made the management necessary to you and the overall delivery of products or services. Set reminders on your calendar to ensure you don't forget with others.

Books:

Consider reading the review of the following books:

- 101 Ways to Get Ahead in Sales by Bill Proctor & Mark Williams, Welfare Publishing Company Inc., 1999
- How to Sell More Than You Can Handle by John C. Maxwell, Life Press Books and Christian Leadership Training Systems, The Life Systems by Henry Markley, Baker Book House Co., 1994
- Selling: Principles and Practice, Management Group, Inc., 1998, Fred W. Wilson, AMBA/ACC, 1996

For any area where the candidate scored outside of the desired range, a Developmental Suggestion is provided

Suggestions include activities, books, seminars, tapes, etc.

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Action Plan Guidance

Your Developmental Action Plan

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Now let's put it all together...

If you are able to complete the following points on each area of strength and also some areas of potential weakness. After you have thought about your Developmental Feedback and Developmental Suggestions (and books, when you have had a chance to discuss them with your manager, make a development plan.

Building On Strengths

Start with your strengths and build on them. You can build on your strengths to be effective in your job. The following table can help you to highlight some areas:

- Review your Developmental Feedback for potential strengths.
- List three parts of your personality, knowledge and attitudes that enable you to do your current job well and could help you to be successful in the future.
- Think to work, but have the strength, confidence to your work and how you could use the same more effectively in the future.

For example, that the following is a very useful organizing and customer person. Here is what that individual is to focus on by building on strengths:

Plan for Building on Strengths	Justified Subsequent
Strength	Contribution to My Success
1. I am socially outgoing.	I enjoy my work and as the history that will have and some great projects. I will join the local Chamber of Commerce and establish links.
2. I am sensitive and enjoy influencing others.	This helps me to present ideas, obtain new or better. I will take some of the following into the new product introduction team, and will help for our salesperson that help that the team being the help us.
3.	

The report gives guidance in writing a personal action plan which capitalizes on strengths and helps to manage weaknesses and close gaps.

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Customization

- Modular Approach
- Can "turn off" the Knowledge and/or Motivations components to shorten the battery
 - Consider if the organization has an extensive training program and time is a concern
 - Will not change price of the report
- Customized Success Profile
- Developed via a Validation Study Project

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Return on Investment -- Validation Results

- ▶ Representatives scoring at higher index ranges had significantly better sales results

Advice	Score Range	Avg. Sales Ratio
Avoid	0-18	.87
OK	19-23	.94
Good	24-26	.97
Better	27-33	1.04
Best	34-45	1.21

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Return on Investment

- ▶ Probability of sales success - based on a weighted index

Range	Score	Range	Probability
	Avoid	0 - 18	16%
	OK	19 - 23	46%
	Good to Best	24 - 25	67%

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SalesMax Summary

- ▶ Web-based, comprehensive assessment of:
 - ▶ Personality
 - ▶ Knowledge
 - ▶ Motivations
- ▶ Validated success profile provides probability of success estimate
- ▶ Customization and validation for clients
- ▶ Selection or development reports
- ▶ Subscribe to APA and EEO guidelines
- ▶ Continued development and refinement of product by licensed psychologists

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