

JCM Consulting Inc.

175 West 200 South
Suite 3006
Salt Lake City UT 84101



www.jcmconsulting.com

801-322-3700

clyde@jcmconsulting.com

Select and Develop Top Performing Sales Professionals

Introducing SalesMax



BIGBY·HAVIS
& ASSOCIATES, INC., INTL.

Distributed by JCM Consulting, Inc.

Revised 10/2005

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

BIGBY·HAVIS

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

BIGBY·HAVIS

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

BIGBY·HAVIS

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

BIGBY·HAVIS

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.

BIGBY·HAVIS

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

BIGBY·HAVIS



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

BIGBY·HAVIS



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



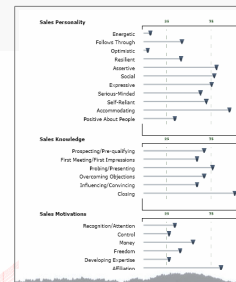
BIGBY·HAVIS



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



BIGBY·HAVIS



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 the total of 173 respondents with scores in this range, most sales representatives in this range had:

Score	Range	Advice
—	80-100	Avoid
77	60-80	OK
—	40-60	Watch
—	20-40	Eliminate
—	0-20	Discard

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 potential customer 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.

BIGBY·HAVIS



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, negative probes are provided to assist you in determining the candidate's suitability. Some candidates generate several questions in further detail. If you have a candidate who is not well-qualified, you may wish to use the following probes to determine the candidate's suitability.

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 "frustrates" and demotivates the candidate.

Interview Probes:

- During the interview, will he be able to describe a typical workday? Ask how the candidate has been able to describe his day. Probe for evidence of effectiveness despite a low 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 was the situation and what led to the result? What did he do to complete his assignment? How did he feel about it?
- Ask general 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 the candidate has difficulty with completing tasks quickly. Probe for insight into the candidate's personality.)
- The candidate is not a high achiever. Being the interviewee, does the applicant struggle in high-pressure situations, time pressure, or sales targets?

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?

BIGBY·HAVIS



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 concerns or message 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 is expected of her and that she is committed to it. Also, you need to make sure she is progressing toward her goals. If she falls behind, hold her accountable and help her to find strategies to avoid the shortcomings in the future.

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.

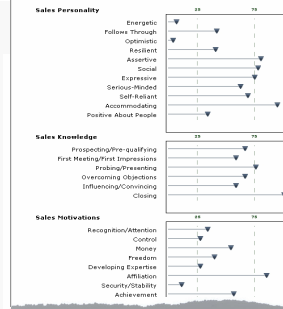
BIGBY·HAVIS



Development Reports

Development Reports Include:

- ▶ Graphic Profile
- ▶ Detailed Feedback
- ▶ Developmental Suggestions
- ▶ Action Plan Guidance



BIGBY·HAVIS



Developmental Feedback

Profile Interpretation

Screen Format
Surveyed 4/12/2012 10:14:16 PM

Personality Factors Linked to Sales Performance:

Your basic underlying personality may help (or) hurt your profits at a high level or may hinder (or) your effectiveness if you do not manage certain characteristics.

Your energy level appears to be indicative of the typical successful salesperson. What is possible to compare to is a clear and confident work pace to working outside or being more engaged. She will often demonstrate a slow energy level on a regular basis. To improve in the area, we recommend that you focus on your energy level in the 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" management suggestion in the report.

You appear to be very sensitive to your needs. This may be linked to being on a team that may need more help than most other professionals. To improve in this area, consider the management suggestion "You Follow Through" in the report.

Her overall attitude about the experience that normally comes as part of sales, you should be able to assess both the disadvantages at an acceptable level. However, if you are unable to respond to the area, our "Overcoming Objections" management suggestion would be a good report.

You have a confident sales presence and that confidence is evident. Asking for the sale generally should come easily for you.

You are outgoing and social by nature. This is an apt to be comfortable meeting new 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, dedicated, hardworking, and professional. You generally take the time to make careful decisions and take only measured risks.

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

BIGBY·HAVIS



Developmental Suggestions

Improving Your Follow Through

Your response to the assessment suggests 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 on more responsibility. We recommend that you focus on your follow through in the report.

Activity: Organizational skills can help you manage your productivity. Take 15 minutes at the end of each workday to list things to be managed to make a list of what you will be doing for the next day. Prioritize your activities and focus on the high-priority items.

Make sure that you are following through on your commitments. Do not accept a request or promise until you are ready to follow through. Set a deadline to ensure that you are progressing as well as you can.

Make sure you are following through on your commitments. Do not accept a request or promise until you are ready to follow through. Set a deadline to ensure that you are progressing as well as you can.

To be more successful in your work, you should be able to assess both the disadvantages at an acceptable level. However, if you are unable to respond to the area, our "Overcoming Objections" management suggestion would be a good report.

You are outgoing and social by nature. This is an apt to be comfortable meeting new 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, dedicated, hardworking, and professional. You generally take the time to make careful decisions and take only measured risks.

When you complete a task, make sure it is completed or completed, and you have made the management suggestion you need for the month. Delivery of products or services. Set a deadline to ensure that you are progressing as well as you can.

When it comes to your work, you are serious, dedicated, hardworking, and professional. You generally take the time to make careful decisions and take only measured risks.

When you complete a task, make sure it is completed or completed, and you have made the management suggestion you need for the month. Delivery of products or services. Set a deadline to ensure that you are progressing as well as you can.

When it comes to your work, you are serious, dedicated, hardworking, and professional. You generally take the time to make careful decisions and take only measured risks.

When you complete a task, make sure it is completed or completed, and you have made the management suggestion you need for the month. Delivery of products or services. Set a deadline to ensure that you are progressing as well as you can.

When it comes to your work, you are serious, dedicated, hardworking, and professional. You generally take the time to make careful decisions and take only measured risks.

When you complete a task, make sure it is completed or completed, and you have made the management suggestion you need for the month. Delivery of products or services. Set a deadline to ensure that you are progressing as well as you can.

When it comes to your work, you are serious, dedicated, hardworking, and professional. You generally take the time to make careful decisions and take only measured risks.

When you complete a task, make sure it is completed or completed, and you have made the management suggestion you need for the month. Delivery of products or services. Set a deadline to ensure that you are progressing as well as you can.

When it comes to your work, you are serious, dedicated, hardworking, and professional. You generally take the time to make careful decisions and take only measured risks.

When you complete a task, make sure it is completed or completed, and you have made the management suggestion you need for the month. Delivery of products or services. Set a deadline to ensure that you are progressing as well as you can.

When it comes to your work, you are serious, dedicated, hardworking, and professional. You generally take the time to make careful decisions and take only measured risks.

When you complete a task, make sure it is completed or completed, and you have made the management suggestion you need for the month. Delivery of products or services. Set a deadline to ensure that you are progressing as well as you can.

When it comes to your work, you are serious, dedicated, hardworking, and professional. You generally take the time to make careful decisions and take only measured risks.

When you complete a task, make sure it is completed or completed, and you have made the management suggestion you need for the month. Delivery of products or services. Set a deadline to ensure that you are progressing as well as you can.

When it comes to your work, you are serious, dedicated, hardworking, and professional. You generally take the time to make careful decisions and take only measured risks.

When you complete a task, make sure it is completed or completed, and you have made the management suggestion you need for the month. Delivery of products or services. Set a deadline to ensure that you are progressing as well as you can.

When it comes to your work, you are serious, dedicated, hardworking, and professional. You generally take the time to make careful decisions and take only measured risks.

When you complete a task, make sure it is completed or completed, and you have made the management suggestion you need for the month. Delivery of products or services. Set a deadline to ensure that you are progressing as well as you can.

When it comes to your work, you are serious, dedicated, hardworking, and professional. You generally take the time to make careful decisions and take only measured risks.

When you complete a task, make sure it is completed or completed, and you have made the management suggestion you need for the month. Delivery of products or services. Set a deadline to ensure that you are progressing as well as you can.

When it comes to your work, you are serious, dedicated, hardworking, and professional. You generally take the time to make careful decisions and take only measured risks.

When you complete a task, make sure it is completed or completed, and you have made the management suggestion you need for the month. Delivery of products or services. Set a deadline to ensure that you are progressing as well as you can.

When it comes to your work, you are serious, dedicated, hardworking, and professional. You generally take the time to make careful decisions and take only measured risks.

When you complete a task, make sure it is completed or completed, and you have made the management suggestion you need for the month. Delivery of products or services. Set a deadline to ensure that you are progressing as well as you can.

When it comes to your work, you are serious, dedicated, hardworking, and professional. You generally take the time to make careful decisions and take only measured risks.

When you complete a task, make sure it is completed or completed, and you have made the management suggestion you need for the month. Delivery of products or services. Set a deadline to ensure that you are progressing as well as you can.

When it comes to your work, you are serious, dedicated, hardworking, and professional. You generally take the time to make careful decisions and take only measured risks.

When you complete a task, make sure it is completed or completed, and you have made the management suggestion you need for the month. Delivery of products or services. Set a deadline to ensure that you are progressing as well as you can.

When it comes to your work, you are serious, dedicated, hardworking, and professional. You generally take the time to make careful decisions and take only measured risks.

When you complete a task, make sure it is completed or completed, and you have made the management suggestion you need for the month. Delivery of products or services. Set a deadline to ensure that you are progressing as well as you can.

When it comes to your work, you are serious, dedicated, hardworking, and professional. You generally take the time to make careful decisions and take only measured risks.

When you complete a task, make sure it is completed or completed, and you have made the management suggestion you need for the month. Delivery of products or services. Set a deadline to ensure that you are progressing as well as you can.

When it comes to your work, you are serious, dedicated, hardworking, and professional. You generally take the time to make careful decisions and take only measured risks.

When you complete a task, make sure it is completed or completed, and you have made the management suggestion you need for the month. Delivery of products or services. Set a deadline to ensure that you are progressing as well as you can.

When it comes to your work, you are serious, dedicated, hardworking, and professional. You generally take the time to make careful decisions and take only measured risks.

When you complete a task, make sure it is completed or completed, and you have made the management suggestion you need for the month. Delivery of products or services. Set a deadline to ensure that you are progressing as well as you can.

When it comes to your work, you are serious, dedicated, hardworking, and professional. You generally take the time to make careful decisions and take only measured risks.

When you complete a task, make sure it is completed or completed, and you have made the management suggestion you need for the month. Delivery of products or services. Set a deadline to ensure that you are progressing as well as you can.

When it comes to your work, you are serious, dedicated, hardworking, and professional. You generally take the time to make careful decisions and take only measured risks.

When you complete a task, make sure it is completed or completed, and you have made the management suggestion you need for the month. Delivery of products or services. Set a deadline to ensure that you are progressing as well as you can.

When it comes to your work, you are serious, dedicated, hardworking, and professional. You generally take the time to make careful decisions and take only measured risks.

When you complete a task, make sure it is completed or completed, and you have made the management suggestion you need for the month. Delivery of products or services. Set a deadline to ensure that you are progressing as well as you can.

When it comes to your work, you are serious, dedicated, hardworking, and professional. You generally take the time to make careful decisions and take only measured risks.

When you complete a task, make sure it is completed or completed, and you have made the management suggestion you need for the month. Delivery of products or services. Set a deadline to ensure that you are progressing as well as you can.

When it comes to your work, you are serious, dedicated, hardworking, and professional. You generally take the time to make careful decisions and take only measured risks.

When you complete a task, make sure it is completed or completed, and you have made the management suggestion you need for the month. Delivery of products or services. Set a deadline to ensure that you are progressing as well as you can.

BIGBY·HAVIS



Action Plan Guidance

Your Developmental Action Plan

Screen Format
Surveyed 4/12/2012 10:14:16 PM

Now let's put all together...

If you are able to complete the following plan, you will be able to manage your work more effectively. After you have thought about your developmental feedback and management suggestions (and, perhaps, after 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 more effective in your job. The following table can help you highlight these areas.

1. Review your developmental feedback for potential strengths.

2. List three parts of your personality, knowledge and experience that enable you to do your current job well and could help you to be successful in the future.

3. Think to work, but have the strength, confidence to your work and how you could use the same strength more effectively in the future.

For example, if you are strong in a very socially engaging and customer person, then in sales that indicates to be better able to build on your strengths.

Plan for Building on Strengths

Strength: **Communication in 30 Seconds**

1. I am socially engaging. I enjoy my knowledge in the history club and I have met some great people. I will join the local Chamber of Commerce and attend their meetings.

2. I am sensitive and enjoy influencing others. This helps me to present ideas, obtain new sales, and I will be able to establish a new sales product distribution team, and will help to get our salespeople from that big that has been using 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.

BIGBY·HAVIS



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

BIGBY·HAVIS



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

BIGBY·HAVIS



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%

BIGBY·HAVIS



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

BIGBY·HAVIS

