



KNOWLEDGE, SKILLS and ACTIVITY ASSESSMENT

Rating	Needs Imp (1)	Good (2)	Very Good (3)	Outstanding (5)
General Skills				
• Relationship Management				
• Setting Agenda				
• Elevatory Speech				
• Uncovering Decision Makers and Decision Making Process				
• Uncovering Budget				
• Uncovering Hot Buttons				
• Presentation Skills				
• Objection Handling Skills				
• Closing Skills				
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Product Knowledge				
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Telephone Skills				
• Getting through the screener				
• Effectively convey reason for the call to DM				
• Handling Objections				
• Closing for the appointment				
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Referrals				
• Asking for internal referrals				
• Asking for external referrals				
• Providing referrals for others				
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Goal Setting				
• Ability to set goals				
• Ability to attain goals				
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Organization Skills				
• Ability to handle details				
• Calendar				
• Task list				
• Time management				
People Skills				
• Handling Conflict				
• Negotiating internally				
• Negotiating externally				
Problem Solving Skills				
• Willingness to take risks				
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•				
• Personal satisfaction with performance so far				
• Perception of management's satisfaction with performance so far -				
• Once word description that he would give himself				
• Once word description that others would give you				
Communication Skills				
• Letter writing				

<p>1. What business challenges are you facing in the next fiscal year? _____ _____</p> <p>2. Which phase of the sales cycle are you having the most difficulty with?</p> <ul style="list-style-type: none"> - Building rapport - Setting agenda - Probing - Presenting - Handling Objections - Closing <p><u>BUSINESS PLAN</u> Does he/she have good monthly/quarterly business plan? What are his/her goals? How does his/her forecast look? Does he/she spend enough time prospecting? What does he/she see his/her issues are? CPA's, probing, presentation? Does he/she make the best use of his/her time?</p> <p><u>PHONE PROSPECTING</u> How is he/she on the phone? Average # appts/blitz? Does he/she prepare well for the blitzes? Does he/she use good benefits statements? Can he/she handle objections? Can he/she close for the appointment? Does he/she use references to get appointments? Does he/she go after specific vertical markets? If so, which ones?</p> <p>•</p>				
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Administrative				
• Utilizing marketing tools				
-Flyers				
-Brochures				
-Giveaways				
-Premium gifts				
-Articles				
-Spotlight Deals				
• CRM functionality				
-E Mail				
-Templates				
Self Improvement				
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• Prospecting game plan				
• Commission to activity exercise				
• Closing skills				
• Top 10 challenges				