

# SALES ASSOCIATE PROFILE

## CONTACT INFORMATION

Name:		
Title:	Years with company	Years in sales
Cell:	Email:	

## SALES INFORMATION

Annual Quota in \$	Annual Quota in # of sales	Year to Date \$	\$ sales YTD	Close ratio:
Year to Date % of Quota		Last year's % of Quota		# of products/ services sell
# of Months exceeded quota this year		# of months exceeded quota last year		Close ratio last year:
Average Sale in \$		Largest sale in \$		Smallest sales in \$
Average sale cycle		Longest sale cycle		Shortest sale cycle

## REVENUE BREAKDOWN

	Current Year	Last Year
Repeat Business		
Additional Business		
Net New Business		
Total Revenues		

## SOURCE OF BUSINESS ANALYSIS FOR NET NEW BUSINESS IN \$

	Current Year	Last Year
Client referral (solicited)		
Client referral (unsolicited)		
COI referral		
Networking event		
Networking group		
Networking association		
Cause/ board of directors		
Webinar		
Speaking engagement		
Company sponsored event		
Phone prospecting		
Foot canvassing		
Email campaign		
Letter campaign		
Marketing Efforts		
Lead generators		
Distributors		
Channels		
LinkedIn		
Facebook/ Twitter		
Article/ Blog		

# SALES ASSOCIATE PROFILE

## CURRENT GOALS

	BUSINESS	PERSONAL
<b>SHORT TERM GOALS</b>		
<b>LONG TERM GOALS</b>		

## MOTIVATORS

RANK THE FOLLOWING MOTIVATORS IN ORDER OF IMPORTANCE TO YOU (#1 = TOP MOTIVATOR)

MONEY	#	PROMOTION	#	BEING #1	#	QUALITY OF LIFE	#
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### YOUR CURRENT EFFORT LEVEL

70%	80%	90%	100%

### YOUR DESIRED EFFORT LEVEL

70%	80%	90%	100%

### LAST 5 PROPOSALS THAT TURNED INTO SALES

COMPANY NAME	INDUSTRY	SOURCE	TITLE OF DECISION MAKER	REASON BOUGHT

### LAST 5 PROPOSALS THAT TURNED DID NOT TURN INTO SALES

COMPANY NAME	INDUSTRY	SOURCE	TITLE OF DECISION MAKER	REASON DIDN'T BUY

## PROSPECTING EFFORTS

### TARGET MARKET/ IDEAL PROSPECTS

TOP VERTICALS:

SIZE COMPANY – REVENUE OR # EMPLOYEES:

GEOGRAPHIC AREA:


**SALES ASSOCIATE PROFILE**

**PROSPECTING ACTIVITIES**

	<b>DAILY</b>	<b>WEEKLY</b>
CALLS/ EMAILS		
FOOT CANVASSING CALLS		
NEW PROSPECT MEETINGS/ CALLS		
EXISTING CLIENT MEETINGS		

**WHAT IS YOUR PHONE PROSPECTING SCRIPT?**


**WHAT IS YOUR 30 SECOND COMMERCIAL?**


<b>BENEFIT STATEMENTS THAT YOU USE</b>	<b>TOP OBJECTIONS THAT YOU HEAR</b>

# SALES ASSOCIATE PROFILE

## COMPANY INFORMATION

### COMPETITIVE INFORMATION

<b>TOP 3 COMPETITORS</b>	1	2	3
<b>WHAT ARE YOUR COMPETITIVE ADVANTAGES?</b>		<b>WHAT ARE YOUR COMPETITIVE DISADVANTAGES?</b>	

### WHAT ARE THE TOP REASONS CUSTOMERS BUY FROM YOU AND YOUR COMPANY?


## JOB/ PERFORMANCE SATISFACTION

### SALES ATTRIBUTES

<b>STRENGTHS</b>	<b>AREAS OR OPPORTUNITY</b>

### LARGEST SALES OBSTACLES


### JOB SATISFACTION

<b>LOVE ABOUT YOUR JOB</b>	<b>DON'T LOVE ABOUT YOUR JOB</b>

### TIME MANAGEMENT

HOURS WORK PER WEEK	HOURS	TOO MUCH	ENOUGH	NOT ENOUGH
PROSPECTING				
ADMINISTRATIVE TASKS				
CUSTOMER SERVICE/ ISSUES				
DRIVING				
NEW PROSPECT VISITS				
CLIENT VISITS				

# SALES ASSOCIATE PROFILE

## SALES PROCESS

### DESCRIBE THE INDIVIDUAL STEPS OF YOUR SALES PROCESS

#### Typical agenda for the first conversation

#### Needs analysis:

When do you typically conduct the needs analysis:

Do you have a needs analysis or discovery form?

What are the most important pieces of information that you need to uncover?

#### Presenting solutions

What stage of the sales process do you present solutions?

Typically how many presentations do you need to do?

What type of presentations do you do? (check off all that apply)

Slide decks	Verbal	Informal	Formal	Group	Individual
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#### Closing techniques

Describe the closing process:

Do you use any closing techniques?

## SALES ASSOCIATE PROFILE

RATING	VERY GOOD	GOOD	NEEDS IMPROVEMENT	N/A
<b>GENERAL SKILLS</b>				
Time Management				
Territory Management				
Organizational Skills				
Handle Details Well				
CRM Use				
<b>COMMUNICATION/PEOPLE SKILLS</b>				
Verbal skills				
Writing Emails				
Listening Skills				
Handle Conflict				
Problem Solving				
Ability to Negotiate				
Internally				
With prospect/clients				
Relationship building				
Networking				
<b>ACTIVITY LEVELS</b>				
Net New Prospects Appointments				
Client Appointments				
Networking Appointments				
Proposals/ Demos/ Presentations				
Networking events/ groups/ associations				
<b>GOALS &amp; ACHIEVEMENTS</b>				
Set Goals				
Written Goals				
Achieve Goals				
Performance Levels				
Utilizing Strategic Plan				
<b>ATTITUDE &amp; MOTIVATION</b>				
Works to Potential				
Positive Attitude				
Enjoys Work				
Motivation level				
Resilient				
Self-development efforts				
RATING	VERY GOOD	GOOD	NEEDS IMPROVEMENT	N/A

## SALES ASSOCIATE PROFILE

<b>PROSPECTING</b>				
Prospecting Plan				
Prospect consistently				
Get through gatekeeper				
Utilize benefit statements				
Reference other clients				
Handle objections				
Close for the appointment				
<b>SALES PROCESS</b>				
Run effective first appointment				
Build business rapport				
Confirm time				
Set expectations and agenda				
Uncover decision maker(s)				
Uncover decision making process				
Uncover alternatives being considered				
Uncover decision making criteria				
Uncover decision making timeline				
Uncover must have or like to have				
Uncover prospect's hot buttons				
Trial close				
Plant seeds/ traps for competition				
Presentation skills				
Handling objections				
Negotiating skills				
Closing skills				
<b>NETWORKING SKILLS</b>				
Asking for referrals				
Strong circles of influence				
Give referrals consistently				
Get referrals consistently				
<b>LINKEDIN</b>				
Use LinkedIn regularly				
LinkedIn recommendations				
LinkedIn connections				
Generated business from LinkedIn				