



# Sales IQ Plus

## Manager's Coaching Guide

*The Sales IQ Plus takes approximately 30 minutes to complete.*

*This assessment is an objective analysis of an individual's understanding of the strategies required to sell successfully in any sales environment. It essentially answers the question, "Can this person sell and how will they sell?"*

*Like any profession, selling has a body of knowledge related to successful execution. It is this knowledge that the Sales IQ Plus measures.*

## Sales IQ Plus Measures 8 Steps in the Sales Process:

- PREPARE to Sell - Sales Preparation & Self Preparation
- TARGET the Right People & Right Strategies
- CONNECT Intellectually & Emotionally
- ASSESS Situational Needs & Personal Wants
- SOLVE the Customer's Problem - Educating & Collaborating
- CONFIRM the Solution & to the Purchase
- ASSURE Current Satisfaction & Continuing Loyalty
- MANAGE Your Sales Potential - Manage Sales & Manage Yourself

*Note: Each situation was developed and validated by sales professionals to reflect real sales strategies used by today's sales forces.*

This report will give feedback on the individual's mindset toward selling and knowledge of successful sales strategies. From this, you can:

- Develop a plan to overcome an individual's sales weaknesses
- Simplify your sales training to focus on the current needs versus everything
- Focus on areas that produce results soonest
- Build confidence in sales situations and sales people
- Identify the sales strategies needed to sell a specific product/service in a given market
- Identify new sales applicant's strengths and weaknesses
- Identify specific training or management needs of a salesperson or sales force.

## How to use the Sales IQ Plus report

The use of the Sales IQ is far more important than any of the information disclosed by the report. Unlike most "tests", it's not your *score* that matters; it's how you use your answers to improve your sales success. So, whether you are the person taking the Sales IQ or the manager/coach conducting the review, focus on the behaviors and choices that will work best in real world sales situations.

Almost all answers are potentially "right" answers. When constructing this assessment, we chose a selection of answers that would all be correct in certain circumstances. Some answers are particularly effective in most situations and others would only apply to certain types of selling or in unique circumstances. Please review your scores in this context. For your convenience, we have provided a comparison of your answers with the most common answers from other sales people across many professions. We have also noted how often you selected the best answer or second best answer. In many cases, there are only minor differences between these top two answers.

Another feature is the notation of your frequency of selecting the least "best" answer. If you choose the least desirable of the answers, then it is worth reconsidering your approach to that sales situation.

## Sales IQ Effectiveness Ratings

	% of Time You Chose the Best Answer		% of Time You Chose either the 1 <sup>st</sup> or 2 <sup>nd</sup> Best Answer		% of Time You Avoided Choosing the Least Best Answer	
	Your Score	All Sales People Score	Your Score	All Sales People Score	Your Score	All Sales People Score
<b>PREPARING</b>	17%	47%	100%	75%	100%	93%
<b>TARGETING</b>	83%	62%	100%	80%	100%	98%
<b>CONNECTING</b>	67%	55%	67%	78%	83%	96%
<b>ASSESSING</b>	17%	42%	83%	72%	83%	87%
<b>SOLVING</b>	67%	55%	100%	78%	100%	94%
<b>CONFIRMING</b>	33%	44%	50%	66%	83%	83%
<b>ASSURING</b>	33%	53%	100%	79%	100%	91%
<b>MANAGING</b>	33%	45%	67%	72%	100%	89%
<b>TOTAL</b>	44%	50%	83%	75%	94%	92%

## Sales IQ Developmental Chart

Click on any title below to watch a short video

 Click on any title below to watch a short video	Question Number	Highly Developed	Advanced Development	Early Development	Needs Development
 <a href="#">Sales Preparation</a>	31, 32, 33			✓	
 <a href="#">Self Preparation</a>	34, 35, 36		✓		
 <a href="#">Targeting the Right Markets</a>	43, 44, 45		✓		
 <a href="#">Targeting the right Methods</a>	46, 47, 48	✓			
 <a href="#">Connecting with the Head</a>	19, 20, 21	✓			
 <a href="#">Connecting with the Heart</a>	22, 23, 24				✓
 <a href="#">Assessing the Person</a>	1, 2, 3				✓
 <a href="#">Assessing the Situation</a>	4, 5, 6		✓		
 <a href="#">Collaborating with the Buyer</a>	37, 38, 39	✓			
 <a href="#">Educating the Buyer</a>	40, 41, 42		✓		
 <a href="#">Confirming the Purchase</a>	13, 14, 15				✓
 <a href="#">Confirming the Solution</a>	16, 17, 18		✓		
 <a href="#">Assuring Continuing Loyalty</a>	7, 8, 9		✓		
 <a href="#">Assuring Current Satisfaction</a>	10, 11, 12			✓	
 <a href="#">Managing Sales</a>	25, 26, 27			✓	
 <a href="#">Managing Yourself</a>	28, 29, 30		✓		

## Who wrote this assessment?

The creators of this assessment are three of the world's leading sales trainers and authors. Jeffrey Gitomer, Jim Cathcart and Tony Alessandra are each Sales & Marketing Hall of Fame inductees and authors of scores of bestselling sales books. More importantly, they all are professional sales people. They paid their dues selling door-to-door, over the phone, and in person, starting at the very bottom and earning their way to the top. Between them, they have sold automobiles, insurance, cookware, professional services, residential and commercial security systems, investments, training programs, consulting, and more. They have worked with literally thousands of clients around the world in a vast array of industries and professions. They have sold in boardrooms, large meetings, one-on-one, in executive offices, across kitchen tables, on farms, in automobiles, via teleconferences, conference calls, and in formal negotiations. In short, if anyone understands selling from a multitude of perspectives, it is these three authors.

Among professional speakers and sales thought leaders, Jeffrey, Jim and Tony are widely respected and followed. In fact, all three of them have been inducted into the Professional Speaker Hall of Fame and have delivered sales training to thousands of audiences worldwide. Jeffrey Gitomer is one of the most successful sales authors in history. Jim Cathcart is the past national president of the National Speakers Association. Dr. Tony Alessandra has created Assessments24x7.com through decades of psychological research with the world's top experts. Tens of thousands of today's leaders have taken assessments designed by each of these authors.

## Where did these questions come from?

The dissection of "selling" into its component parts is your guide to *what to wonder about*. When you know what to wonder about, then you can ask the right questions. Therefore, we have taken the eight major aspects of the sales process and subdivided them into 16 sub-categories, thereby allowing you to be surgically specific about the sales decisions to consider.

Next, we took the matrix of varied styles of selling and sales circumstances and constructed a series of scenarios that everyone could identify with, e.g., an appointment where the client did not show, or having a surprise guest at the meeting, or not being sure when to ask for the order, etc. In each instance, we selected an assortment of "good" answers or best solutions. These were then ranked by most-to-least effective by the three authors with ongoing feedback from hundreds of sales people, sales managers and sales coaches.

## What types of selling does this content apply to?

We wanted to appeal to both small businesses and large enterprises. In reviewing the world's largest sales organizations, we identified the industries and sales processes most prevalent today and then we created a matrix of types of products and services being sold, styles or modes of selling used, situations most likely to be confronted in selling, and reasons for buying (from the customer's point of view.) We also reviewed our thousands of client organizations, large and small, and their use of sales tools and sales training resources.

Next, we considered some of the challenges that come up in sales such as helping customers determine how to pay for the purchase or cross selling to other departments. We also looked at in-home sales, selling at meetings, selling via RFP (proposals), competitive bidding and demonstration-based selling. In short, we scanned the field to assure that few if any sales people were left out. Therefore, in this context, there may be some sales situations, or even sales competencies, that are not as relevant to your specific type of selling. Therefore, if the sales person scores low in a sales competency not relevant to your sales situation, there is little or no need to focus on that area. Conversely, if the sales person does not score high in a sales competency quite relevant to your sales situation, there is considerably more need to focus on that area.

Our matrix included, among others: Retail sales, Direct selling, In-person selling, Telephone sales, Online sales, Consultative selling, Tech sales, Prescriptive selling, Multi-level or Network selling, Professional services, Referral selling and more.

## How was the information in this assessment validated?

There are many forms of validation from "face validity" where the user agrees with the accuracy of the report to "content validity" based on what is being assessed and "context" validity that looks at the value of it within the situations to which it applies. Many other measures are used to validate testing depending on the use of the instrument.

We went directly to the users. Our worldwide network of clients and colleagues had a number of early looks at the Sales IQ Plus and provided enlightened feedback on what we were measuring, how we presented the information, the accuracy of our "best" answer rankings, and much more. They told us how they wanted to use this tool and what would make it more effective in actual application. We are grateful for their guidance.

## Here are some of the questions explored by this assessment:

- How ready is this sales person to succeed in selling?
- How will he or she handle the challenges and capture the opportunities?
- What is his or her approach to selling in general?
- Is this a fit with our organization's beliefs and selling style?
- How ready is your sales team for sales opportunities?
- How ready are they (compared to competitors) for the emerging sales opportunities in today's hyper-competitive economy?

## Sales success requires that you be highly effective in two major areas:

- Making sales
- Managing yourself as a sales person

There are a multitude of skills, behaviors, knowledge and attitudes involved in any successful sales career. To know how to improve your own sales performance requires that you look at all of them from time to time. The Sales IQ Plus is your tool for doing this self-assessment.

This instrument consists of 48 questions (chosen randomly from a database of 160+ questions that are growing in number constantly) that guide you in assessing each of the eight primary sales competencies. A sales "competency" is a category of selling proficiency that contains a number of different skill and knowledge components. All eight competencies combine to provide an overview of your selling effectiveness. Six questions explore each competency from a variety of perspectives. Following is what is measured with suggestions of sales activities to consider doing/improving to increase your sales effectiveness in each of the eight sales competencies and 16 sub-categories.

### **For each sales competency and sub-category, ask the sales person:**

- To identify the reasons they believed they scored well or poorly on the Sales IQ test overall, in each of the eight sales competencies and on each individual question.
- To suggest (before you offer your feedback and suggestions) how they can improve in each of the eight sales competencies, especially in the ones they scored poorly
- To set specific measurements and timelines for how and when their (and your) suggested improvements can be evaluated and improved, if necessary.

## PREPARE to Sell - Sales Preparation & Self Preparation

### Sales Preparation Falls into 2 Areas: External & Internal

**External preparation** is about researching and understanding your market, industry and competition by looking for information and resources outside of your own organization. If the sales rep scored low in this section, here are some areas to explore with the sales rep to help improve their effectiveness:

- Researching your industry, market, competitors, customers and prospects
- Studying various sales techniques, concepts and learning materials
- Getting demographics, statistics and details to help you better understand your prospective buyers and their needs
- Planning your territory and overall market strategies
- Projecting sales
- Setting general sales strategies and tactics

**Internal preparation** is knowing and using your company, products, clients and resource team effectively. This involves looking for information and resources within your own organization. If the sales rep scored low in this section, here are some areas to explore with the sales rep to help improve their effectiveness:

- Acquiring company, product and job knowledge
- Knowing the sales tools and systems that are most successful
- Researching customer histories
- Studying past clients and trends in your chosen markets
- Setting sales goals, activity goals, goals for each account and each sales contact
- Coordinating with others on your sales team

## PREPARE to Sell - Sales Preparation & Self Preparation

### Self Preparation Falls into 2 Areas: Mental & Physical

**Mental preparation** is done by refreshing your knowledge and getting into the right frame of mind. If the sales rep scored low in this section, here are some areas to explore with the sales rep to help improve their effectiveness:

- Reviewing your specific goals for each sales contact
- Refreshing your knowledge of sales techniques, product details, and customer benefits offered by each feature of your product/ service
- Pricing strategies and options you can offer
- Reviewing vital information just prior to a sales contact
- Rehearsing the presentation
- Anticipating potential objections and concerns
- Reviewing answers to key questions
- Listing questions you will want to ask
- Getting yourself into a cheerful, helpful and proactive frame of mind

**Physical preparation** is preparing your sales resources and personal appearance for the right impact. If the sales rep scored low in this section, here are some areas to explore with the sales rep to help improve their effectiveness:

- Determining when and where to meet your customer
- Choosing the seating arrangement that works best
- Handling potential distractions in advance
- Assembling the sales tools and information resources you will need
- Allowing for interruptions and delays
- Inspecting every aspect of your appearance - your clothes, grooming and personal hygiene
- Showing up on time
- Considering how you greet others and present yourself when you think others aren't looking
- Checking to assure that your sales materials and products present the right image and are working properly

## TARGET the Right Markets & Right Methods

### Targeting the Right Markets Falls into 2 Areas: Groups & Individuals.

**Targeting the right groups** involves identifying the categories, types of organizations and best groups of prospects who can best afford and benefit from your product or service. If the sales rep scored low in this section, here are some areas to explore with the sales rep to help improve their effectiveness:

- Conducting market and competitive analysis
- Studying your product sales statistics
- Identifying the biggest pools of potential buyers
- Analyzing sales potential of each product within each market segment
- Ranking accounts
- Generating a comprehensive market profile
- Developing a list of your “targets” and determining how they get their information, who they listen to, what they desire, fear, etc.
- Finding where your “targets” congregate, groups they belong to, and publications they read

**Targeting the right Individuals** is about identifying your ideal customers and finding the decision makers. If the sales rep scored low in this section, here are some areas to explore with the sales rep to help improve their effectiveness:

- Having a clear profile of your ideal customer
- Knowing who has decision-making power within the organization
- Isolating the most important needs you can address for decision-makers
- Following a valid process to qualify each prospective customer
- Spending very little time with non-decision makers and gatekeepers
- Assuring that you are calling on the people with whom you can best establish credibility
- Generating leads
- Gaining qualified referrals
- Acquiring powerful testimonials and endorsements
- Getting introductions
- Building an unending flow of future prospects

## TARGET the Right Markets & Right Methods

### Targeting the Right Methods Falls into 2 Areas: Strategies & Tactics

**Strategies** involve building a reputation and brand position and choosing the approaches you take toward building demand for and distribution of your product. If the sales rep scored low in this section, here are some areas to explore with the sales rep to help improve their effectiveness:

- Determining what reputation and brand identity you want in your chosen markets
- Identifying the “professional assets” you will need to gain that reputation or position
- Choosing the media mix and sales approaches to use
- Acquiring the resources needed for promotion and publicity
- Having a coordinated plan and ongoing process for stimulating interest in and desire for your products
- Selecting the best distribution methods for reaching your markets
- Using email, web marketing, trade shows, social media, phone calls, joint ventures and other tools in a coordinated manner, including selecting the right number and type of sales calls to make

**Tactics** involve calling on the right people in the right ways to open up sales opportunities. If the sales rep scored low in this section, here are some areas to explore with the sales rep to help improve their effectiveness:

- Determining how to best penetrate a company or industry
  - Who to call on first
  - What sales appeals to use
  - Which products to lead with
  - What offers to make
  - Who should make the first call
  - How to easily progress from one sale to another
  - How many calls to make per prospect
- Developing methods for getting to the decision makers with minimal effort
- Learning how to sell through others or to committees
- Having a compelling “elevator talk” or unique value proposition
- Knowing your various sales hooks and opening statements
- Using samples and free gifts appropriately
- Determining how you can best reach your prospects with the credibility and confidence that will open doors and minds to your offer

## CONNECT with the Head & with the Heart

### Connecting with the Head Falls into 2 Areas: Credibility & Activity

**Credibility** is about establishing yourself as a viable resource to the prospect. If the sales rep scored low in this section, here are some areas to explore with the sales rep to help improve their effectiveness:

- Establishing your credentials and qualifications for helping the prospect with your type of product or service
- Using testimonials and endorsements wisely
- Tapping into referrals to open the dialogue
- Showing the importance of your offer to the prospect
- Asking compelling questions
- Documenting your claims
- Being organized and professional in your early communication
- Making the case for how much value you can bring to the prospect
- Using sales tools and resources to build credibility as you communicate with each prospect or client
- Showing the person that you are there as a resource not merely as a vendor

**Activity** involves making the right number and type of sales contacts. If the sales rep scored low in this section, here are some areas to explore with the sales rep to help improve their effectiveness:

- Getting in front of the right type and number of new and repeat customers who could benefit from buying
- Developing discipline in filling each day with actual sales contacts
  - Telephone calls
  - Email communications
  - Correspondence
  - In person calls
  - Live demonstrations
- Increasing the amount and quality of direct communication with qualified prospects rather than just the supportive activities that process sales or lead to future business
- Becoming a viable resource to your customers and that it makes good sense to do business with you

## CONNECT with the Head & with the Heart

### Connecting with the Heart Falls into 2 Areas: Relationship & Trust.

**Relationship** is about understanding personality differences and buying styles. If the sales rep scored low in this section, here are some areas to explore with the sales rep to help improve their effectiveness:

- Learning to read people so as to know how they process information and how they relate to others
- Matching the pace and style of the prospect
- Practicing good people skills such as courtesy, empathy, acknowledgement, and rapport building
- Knowing how to position yourself into the appropriate relationship with the customer
  - Advisor
  - Coach
  - Problem solver
  - Expert resource
  - Strategic ally
  - Business friend
  - Preferred provider

**Trust** is about building trust and managing relationship tension. If the sales rep scored low in this section, here are some areas to explore with the sales rep to help improve their effectiveness:

- Sustaining optimism and encouragement in the dialogue
- Keeping fear levels low while stimulating the need to buy
- Recognizing when tension should increase and should not
- Knowing the difference between relationship tension and task tension
- Showing concern for the needs of the prospect and respecting him or her as a person
- Being appropriately respectful of your competition without weakening your own sales position
- Knowing how to draw a line between being a social friend and being a business friend

## ASSESS the Situation & the Person

### Assessing the Situation Falls into 2 Areas: Probing & Analyzing

**Probing** is about being skilled at asking the right questions and getting the answers. If the sales rep scored low in this section, here are some areas to explore with the sales rep to help improve their effectiveness:

- Knowing what to be curious about
- Understanding the many types of questions and questioning techniques
- Being skilled at asking for information in a non-threatening way
- Determining how this person and organization make buying decisions of this type
- Learning how to probe for information that you might otherwise overlook

**Analyzing** is about identifying the needs and opportunities. If the sales rep scored low in this section, here are some areas to explore with the sales rep to help improve their effectiveness:

- Exploring all the information presented to you in such a way that you identify the gap between what they have and what they need
- Recognizing the practicality of their expectations
- Assessing financial aspects
- Identifying opportunities, alternatives and options available
- Compiling and analyzing resources you can use
- Finding additional reasons for the prospect to buy
- Recognizing the roles that various people play in the buying decision

## ASSESS the Situation & the Person

### Assessing the Person Falls into 2 Areas: Understanding & Empathizing

**Understanding** is about finding the primary buying motive. If the sales rep scored low in this section, here are some areas to explore with the sales rep to help improve their effectiveness:

- Finding the hot button items that contain the strongest appeal to the prospect
- Identifying the gap between what they need and what they want
- Recognizing prejudices or blind spots in their point of view
- Learning how they feel about competitive alternatives
- Identifying their fears and concerns
- Understanding their overall goals, values and priorities
- Seeing the limits to their authority and best ways to help them justify buying

**Empathizing** involves listening and people reading, understanding feelings as well as facts. If the sales rep scored low in this section, here are some areas to explore with the sales rep to help improve their effectiveness:

- Respecting the importance of feelings and emotions
- Caring about how you can help
- Listening effectively by eliminating any irritating listening habits you may have developed
- Getting people to talk openly with you
- Being aware of differences in
  - Personality type
  - Personal velocity
  - Intellectual capacity
  - Values
  - Confidence levels
  - Dreams
  - Aspirations
  - Fears
  - Concerns
- Adjusting your own pace or preferences to be more compatible with your customers' pace or preferences
- Dealing with different people in different ways while maintaining your own integrity

## SOLVE the Customer's Problem - Educating & Collaborating

### Educating the Buyer Falls into 2 Areas: Presenting & Showing Relevance

**Presenting** refers to your ability to deliver a persuasive presentation. If the sales rep scored low in this section, here are some areas to explore with the sales rep to help improve their effectiveness:

- Assembling compelling information and materials
- Using presentation tools with skill
- Speaking confidently and effectively with and without presentation aids
- Reacting professionally to distractions and interruptions
- Involving your listeners in your presentation
- Using persuasive language
- Blending gestures and words appropriately
- Changing pace and style to fit the situation
- Holding attention and starting and ending on time
- Being really good at presentations
- Keeping your sales activity high
- Making presentations often

**Showing Relevance** is about providing compelling evidence as to how the customer will benefit from buying. If the sales rep scored low in this section, here are some areas to explore with the sales rep to help improve their effectiveness:

- Documenting and providing evidence of the value you are bringing to the customer
- Relating your presentation to the goals, interests, fears, concerns, priorities, needs and values of your client
- Pointing out and emphasizing the gap between what the person has and what they could have from you
- Quantifying the payoff for the client
- Building value units - take one of the client's needs, suggest a feature you offer, benefits accruing from the feature, value of the benefits to the client, proof that you can deliver the value, cemented by the client's agreement that this matters to him or her

## SOLVE the Customer's Problem - Educating & Collaborating

### Collaborating with the Buyer Falls into 2 Areas: Personalizing & Involving

**Personalizing** is getting the customer to understand and feel the value of your offer. If the sales rep scored low in this section, here are some areas to explore with the sales rep to help improve their effectiveness:

- Selling benefits and solutions rather than features
- Presenting the value units that were built into the “showing relevance” process
- Illustrating your points with stories and examples that relate directly to your client
- Conducting demonstrations and giving actual examples that show the customer the value they will receive
- Using the customer’s name and the name of their company as appropriate
- Referring to local and current items, people and issues in your presentation
- Using the customer’s own words when responding to questions

**Involving** gets the customer to participate in discovering the solution they seek. If the sales rep scored low in this section, here are some areas to explore with the sales rep to help improve their effectiveness:

- Getting the customer’s support to help you make the sale
- Involving the customer in completing some of the steps in a demonstration
- Establishing a point-counterpoint role play discussion to illustrate a point
- Working as a partner in problem solving rather than as a persuader
- Putting yourself in your customer’s position and speaking as his or her advocate
- Leading them through a series of questions to help them explore the benefits you can offer
- Working together to generate a plan
- Helping the prospect prepare to be an effective representative and advocate for you if they are presenting your proposal to others
- Assembling materials that they can use to sell others on your behalf

## CONFIRM the Solution & CONFIRM the Purchase

### Confirming the Solution Falls into 2 Areas: Summarizing & Negotiating

**Summarizing** is giving benefit summaries and identifying next steps for your customer. If the sales rep scored low in this section, here are some areas to explore with the sales rep to help improve their effectiveness:

- Giving benefit summaries and value illustrations
- Projecting what they will get
- Comparing statistics of owning vs. Not owning your product
- Reviewing the reasons that they should want to buy
- Eliminating lingering concerns
- Getting buy-in from others involved in the decision
- Gaining minor and major agreements toward the buying decision
- Using opinion questions, trial closes, and confirming smaller details to ease the way toward the buying commitment

**Negotiating** is mostly about resolving the customer's concerns without reducing your price. If the sales rep scored low in this section, here are some areas to explore with the sales rep to help improve their effectiveness:

- Working as collaborators toward finding solutions vs. Becoming adversaries in a disagreement
- Using tact and diplomacy effectively
- Agreeing to minor points without conceding major ones
- Apologizing when needed
- Letting the prospect prevail on some issues while standing your ground on others
- Comparing your positions on various issues, noting areas of general agreement
- Responding effectively to objections and concerns
- Having organized answers to the most common concerns and questions
- Knowing how much flexibility you have on the three primary areas of negotiation: price, terms, and conditions
- Measuring your actual net profit per sale
- Noting the use of concessions and give aways in the mix
- Considering the impact of your agreements on other departments and people in your business pipeline

## CONFIRM the Solution & CONFIRM the Purchase

### Confirming the Purchase Falls into 2 Areas: Asking & Confirming

**Asking** is about clearly requesting the purchase and making it easy for the person to say yes. If the sales rep scored low in this section, here are some areas to explore with the sales rep to help improve their effectiveness:

- Recognizing buying signals and knowing how to respond to them
- Knowing when to ask for the order
- Asking in a way that is natural and does not increase relationship tension
- Using the customer's words in the statement you make just before requesting the commitment
- Being clear and okay about asking for the order
- Allowing for silence after you ask so that the customer can make the transition from considering the product into owning the product
- Rehearsing the request for the order with others so as to increase your confidence and poise when face to face with a prospective customer
- Eliminating implied apologies or uncertainty in the way you ask for a commitment
- Knowing what words have power and what words do not
- Making it easy for the prospect to agree to the purchase

**Confirming** is getting the formal commitment to buy. This is typically called "closing." If the sales rep scored low in this section, here are some areas to explore with the sales rep to help improve their effectiveness:

- Handling objections and concerns effectively
- Getting written commitments to specific agreements
- Summarizing agreements
- Eliminating lingering concerns or resistance
- Ironing out all details before concluding the sales call
- Measuring your actual closing ratio (calls to sales)
- Keeping records of the actual value of each sale
- Getting the official signatures on the documents
- Noting and confirming the credit card or account numbers
- Getting the vital data such as social security number, purchase order number, etc.
- Assuring that the customer is fully aware that he or she has made a commitment to buy and they know the amount, terms and conditions to which they have agreed

## ASSURE Current Satisfaction & Continuing Loyalty

### Assuring Current Satisfaction Falls into 2 Areas: Review & Follow-Through

**Review** is giving an on-site summary of the value of buying plus a preview of next steps. If the sales rep scored low in this section, here are some areas to explore with the sales rep to help improve their effectiveness:

- Orientating the customer toward ownership
- Providing owner's documents, manuals, basic instructions, introductions to service personnel, samples, assistance in startup procedures, and initial hand holding
- Having the customer perform some of the functions in your presence (remember that operator error is a main source of dissatisfaction)
- Conducting annual account reviews with existing customers
- Completing performance reports
- Getting feedback from customers as to their buying or ownership experience

**Follow Through** is supervision of the delivery and initial steps of the ownership experience. If the sales rep scored low in this section, here are some areas to explore with the sales rep to help improve their effectiveness:

- Conducting callbacks to check on delivery or initial use
- Checking with others within your company to assure that all goes as promised
- Getting feedback from the new owner that allows you to improve their experience immediately
- Doing little extra things that exceed the customer's expectations
- Making immediate corrections of problems or errors
- Causing the customer to feel safe, protected, cared about, and as if they are in the hands of an expert
- Delivering what you promised
- Determining how strong the trust bond will be in the future

## ASSURE Current Satisfaction & Continuing Loyalty

### Assuring Continuing Loyalty Falls into 2 Areas: Up Serving & Recovery

**Up Serving** is adding value after the sale, increasing their satisfaction. If the sales rep scored low in this section, here are some areas to explore with the sales rep to help improve their effectiveness:

- Holding yourself to high service standards
- Looking for ways to increase the customer's satisfaction without necessarily adding cost to you
- Showing customers that you care
- Sharing ideas for more owner enjoyment
- Passing along tips and new ideas
- Performing in-person service calls on occasion
- Doing periodic account reviews
- Reminding customers of the value they are getting
- Considering your customers to be your business family and showing it
- Holding customer appreciation events
- Using the right mix of forms of communication for each client
- Performing upgrades and purchase increases, when appropriate

**Recovery** is smoothly resolving problems and retaining the customer's loyalty. If the sales rep scored low in this section, here are some areas to explore with the sales rep to help improve their effectiveness:

- Resolving problems quickly
- Taking time to personally correct errors
- Showing up to demonstrate your concern
- Listening fully before responding
- Replaying a customer's words and feelings before trying to explain your position
- Making allowances for the emotional component in a problem
- Fixing the person first and then the problem
- Offering a sincere apology
- Acknowledging errors and insensitive behaviors
- Describing to the customer how you understand his or her dilemma
- Providing compensation appropriate to the error
- Making symbolic gestures of apology or sympathy
- Showing you care and will not delay in doing what is appropriate to make the situation right again
- Recovery can be measured through repurchase ratios, customer retention and upgrades.

## MANAGE Your Sales Potential - [Manage Sales](#) & [Manage Yourself](#)

### Managing Sales Falls into 2 Areas: Resources & Information

**Managing Resources** is using technology and other resources to improve your sales effectiveness. If the sales rep scored low in this section, here are some areas to explore with the sales rep to help improve their effectiveness:

- Utilizing human resources such as coworkers, specialists and experts, your sales manager, sales coach, colleagues, family and friends, support team, and even your customers and centers of influence
- Reaching out to others for strength, wisdom and support
- Managing your time wisely
- Knowing and respecting the prime selling time
- Finding and using material resources such as sales tools, presentation equipment, demonstration models, computers, Customer Relationship Management or Sales Force Automation software, online presentation tools, resources within your own website, testimonials and case studies of successful sales or applications

**Managing Information** is keeping and using sales records to manage yourself effectively. If the sales rep scored low in this section, here are some areas to explore with the sales rep to help improve their effectiveness:

- Keeping and using sales records to improve ratios of calls to contacts to presentations to sales to profits to customer retention to reorders and upgrades, etc.
- Monitoring your costs of doing business
- Knowing your best uses of time
- Recognizing your strengths and areas of vulnerability
- Managing business priorities
- Keeping good customer records and keeping your information up to date
- Tracking website usage, effectiveness of direct mail or email campaigns, sources of prospects, best-selling products, best areas for profit, etc.

## MANAGE Your Sales Potential - [Manage Sales](#) & [Manage Yourself](#)

### Managing Yourself Falls into 2 Areas: Growth & Motivation

**Growth** is about learning and improving, becoming a greater resource to others. If the sales rep scored low in this section, here are some areas to explore with the sales rep to help improve their effectiveness:

- Engaging in lifelong learning
- Setting and tracking personal and professional goal setting
- Building equity in your career by acquiring professional assets such as; reputation, relationships, credentials, education, experiences, net worth, and expert skills
- Developing all areas of your life: mental, physical, family, social, spiritual, career, financial and emotional
- Tracking and increasing your growth in each of the areas
- Focusing on career advancement and social advancement
- Cultivating the habit patterns of the person you would like to be

**Motivation** is about self-leadership, getting yourself to do what needs to be done, when it needs to be done, whether you feel like it or not and still doing it well. If the sales rep scored low in this section, here are some areas to explore with the sales rep to help improve their effectiveness:

- Maintaining a positive mindset
- Overcoming sales slumps
- Resisting performance plateaus
- Handling rejection effectively
- Managing your personal priorities
- Keeping yourself active in your career
- Reaching beyond your previous limits
- Challenging yourself
- Reaching outside your own interests to be of service to others
- Becoming a better person with each passing day
- Raising the standards to which you hold yourself
- Clarifying your dreams and goals and keeping them before you every day
- Utilizing tools, information, relationships and reminders to keep yourself at your best every day
- Encouraging others in their own quest to grow and succeed

### In Summary

By assessing your sales effectiveness in each area, you gain an overview that allows you to be a much better self-manager as well as a better sales person.

This Sales IQ Plus assessment should be done 2-4 times each year. Because the 48 questions are randomly selected from a much larger database of questions, it is highly unlikely that any single sales person will get the same Sales IQ test twice. Similarly, two or more sales people from the same company taking the Sales IQ test will unlikely get the same questions.

As you master one area of selling, another might need attention. Nobody can attend to all areas at once, so occasional check-ups make a big difference in keeping you in a constant state of sales improvement.

By seeking Sales IQ Plus feedback from others based on your results, i.e., a sales coach, manager, coworker, friend or key client, you will expand your awareness profoundly. Even though you may know yourself very well, the observations of others about your skills or behaviors can tell you much that would never have occurred to you by using only your own point of view. Three possible outcomes will be evident in your Sales IQ Plus. When you see the chart displaying your self-assessment in each area, you can then go directly to the questions and your answers to gain input from your observers, you will see:

1. Areas with which you agree that your answers were just fine
2. Areas with which you agree that a change is needed
3. Areas with which you disagree about the need for change

If you agree that things are fine, your best path is to continue as is. If you agree that improvement is needed, your next step is to decide specifically what and how to improve. In addition, if you disagree as to whether or not you need improvement, you can focus on exploring the situation to see whose view is most accurate – your view, the view of your observers or the Sales IQ Plus test results.

The major aspects of each sales area are identified for you in this report and are directly related to each of the 16 key areas of sales effectiveness (the 8 competencies divided into two sub-categories each.)

**For the upper-level Sales Leader or Executive:** you can determine your organization's overall sales effectiveness and identify the training that is most needed by having each of your sales people complete an assessment and view the consolidated sales team results report.

**As a Supervisor or Sales Manager:** you can use Sales IQ Plus in a coaching interview sharing your observations alongside a sales person's self-assessment to determine exactly which aspects of sales effectiveness are needed. You can be surgical in your coaching, rather than general.

**As a new or veteran Sales Professional:** you will learn more about your effectiveness in all aspects of selling and you will have a clear idea of which skills to refine first.