Systematically maximising the performance of your sales organisation

A guide to implementing Objective Management Group's sales team evaluation and sales candidate screening tools

Objective Management Group

inflexion point
Outcome-Centric Selling®

Why evaluate your sales organisation?

B2B buying behaviours have evolved dramatically over the past few years - and if anything, the pace of change is accelerating. More stakeholders are becoming involved in significant purchase decisions, and consensus is harder to achieve than ever.

Buyers are concerned about making a mistake. Their “Fear of Messing Up” [FOMU] is now more powerful than their “Fear of Missing Out” [FOMO] - and it’s no wonder that so many apparently promising opportunities are ending with a decision to do nothing - at least for the moment.

Prospects - rightly - are expecting more from salespeople. “Knowing your product” or being able to deliver a word-perfect company pitch isn’t enough. Our customers are crying out for expert guidance. They want to be confident they will achieve the business and personal outcomes they are looking for.

It’s already painfully clear that salespeople, and sales organizations, that fail to adapt to these changes are being left behind and that the gap between the best and worst performers continues to get wider.

Recruiting, developing and retaining people with the appropriate attitudes, behaviours and competencies has never been more important - not just at the salesperson level, but throughout the management and leadership of the whole sales organization.

It should be no surprise that enlightened sales organizations recognize the need to invest in developing their people, or that improving competence through coaching is one of their top priorities. But how and where should organizations focus their coaching efforts?

That’s where Objective Management Group’s sales team evaluation and sales candidate screening tools come in. OMG take an evidence-based approach to assessing both the collective and individual development priorities of our current sales organization - and they allow us to ensure that we also hire the right new people into our organization as we grow, and that we develop them appropriately.

Why OMG?

Inflexion-Point has chosen to partner with Objective Management Group [OMG] as the leading global provider of sales team analyses, salesperson evaluations, and sales candidate assessments. Since 1990, OMG has evaluated nearly 33,000 sales organizations and assessed more than 2.2m salespeople, sales managers, and sales leaders.

Unlike generic behavioural or personality tests, OMG’s offerings are specifically designed for the sales profession. They have identified 21 Sales-Specific Competencies that measure an individual’s Selling Competencies, Sales DNA, and their Will to Sell.

OMG’s offerings are designed for sales reps, sales management, and sales leadership. Clients can configure their tests for inside roles, territory and vertical-based sales, account management, channel sales, national accounts, major accounts, hunting roles, farming roles and tele-sales.

OMG report on the organization as well as the individual. Their consolidated Sales Effectiveness and Improvement Analysis (SEIA) provides an in depth look at the people, systems, and strategies across an entire sales organization. Sales leaders use OMG’s SEIA to answer questions on manager effectiveness, skill gaps across their team, and opportunities for improvement.

And when it comes to hiring, OMG’s evidence-based, sales-specific approach has a far stronger predictive value than traditional behavioural or personality tests. The results speak for themselves: within 12 months, more than 9 out of 10 of candidates that were hired after being recommended by an OMG Assessment are rated as having positive on-the-job performance, while more than three-quarters of the candidates that were not recommended by an OMG Assessment but were nevertheless hired have either not been retained or are rated as poor performers.

Evaluating your existing sales organization

Most sales organizations suffer from very significant performance differences between their best- and worst-performing salespeople, and frequently the greatest gains can be achieved by “moving the middle” of the sales organization closer to the top performers through the implementation of effective systems and processes, combined with a structured training and coaching program.

Unfortunately, many of these initiatives are based on assumption rather than evidence, or are not implemented, monitored, and measured as effectively as they need to be. As a result, training all-too-often fails to deliver lasting improvement, coaching efforts often fail to realize their potential, and changes to systems and processes often fail to deliver the expected impact.

Objective Management Group’s approach is based on a structured evaluation of the attitudes, behaviours, and competences of every member of the sales organization and provides an evidence-based platform for developing and implementing sales performance improvement programs that have been proven to have lasting positive impact.

The key data points are gathered using scientifically-designed, evidence-based individual online assessments which typically take no more than 45-50 minutes to complete and can be taken in a wide range of common languages.

There are two major types of output: individual **Insight Reports** tailored to the roles and responsibilities of each member of the sales organization (using different formats for salespeople, sales managers, and the sales leader) and a consolidated **Sales Effectiveness and Improvement Analysis** (SEIA) report which explores patterns of performance across the entire organisation.

The results are compared to more than 2.2 million assessments in order to assess performance, provide relevant benchmarks and to establish the potential for improvement.

Sales Insights Report

Each salesperson receives a detailed Sales Insight Report (here’s a sample) that focuses on 21 core sales attitudes, behaviours, and competencies organised in three key groups:

- **Will to Sell -** covering the critical attributes of desire, commitment, outlook, responsibility, and motivation
- **Sales DNA -** addressing key performance-influencing factors including the participant’s need for approval, their ability to stay in the moment, their beliefs, their own buying behaviours, their comfort in discussing money and their ability to handle rejection
- **Specific Sales Competencies -** these are role-dependent and include hunting, reaching decision makers, relationship building, consultative selling, selling value, qualifying, presenting, and closing - as well as their ability to follow sales process and to embrace sales technology

Sales Management Insights Report

Each sales manager receives a detailed Sales Management Insights Report (here’s a sample) that focuses on key sales management attitudes, behaviours, and competencies:

- **Will to Manage -** covering the sales manager’s desire, commitment, outlook, responsibility, and motivation
- **Sales Management DNA -** key success factors looked at through the lens of the sales manager’s responsibilities, including the manager’s own need for approval, their ability to stay in the moment, their beliefs, their buying behaviours, and their comfort in discussing money
- **Specific Management Competencies -** management-specific skills and abilities including coaching, motivating, accountability, recruiting, pipeline management, relationship building, and closing - as well as their ability to focus on developing their team and to ensure that every salesperson successfully follows sales process and embraces sales technology

Sales Leadership Insights Report

In multi-level sales organisations, the overall sales leader receives a detailed Sales Leadership Insights Report (here's a sample) that focuses on key sales leadership attitudes, behaviours, and competencies:

- **Will to Lead -** covering the sales leader's desire, commitment, outlook, and responsibility
- **Sales Leadership DNA -** key success factors looked at through the lens of the sales leader's responsibilities, including the leader's own need for approval, their ability to stay in the moment, their beliefs, and their own their buying behaviours
- **Specific Leadership Competencies -** leadership-specific skills and abilities including sales leadership, strategic thinking, relationship building, personal qualities, coaching, motivating, recruiting, and accountability

Taken together, these salespeople, manager and leadership insights reports provide the platform for establishing evidence-based personal development plans that address both training and coaching priorities for each member of the sales organisation.

Sales Effectiveness and Improvement Analysis [SEIA]

OMG's Sales Effectiveness and Improvement Analysis [SEIA] is a comprehensive consolidated report (here's a sample) that explores the detailed patterns of current performance and the potential for improvement across the organisation as a whole.

The SEIA explores in detail the observed levels and patterns of desire, commitment, outlook, responsibility, motivation, need for approval, ability to stay in the moment, beliefs, buying behaviours, comfort in discussing money, and ability to handle rejection - together with the role-specific competencies associated with hunting, reaching decision makers, relationship building, consultative selling, selling value, qualifying, presenting, closing, following sales process, and embracing sales technology.

In addition, the SEIA seeks to answer the following questions:

- Have we got the right people in the right roles?
- Have we been recruiting the right sort of people?
- What should our training and development priorities be?
- How much more effective could we be if we implemented the SEIA's recommendations?

The SEIA is an invaluable tool for enabling sales managers and leaders to identify where the greatest scope for improving their sales organisation's performance lies, and for identifying where training programmes and initiatives could have the greatest impact.

It can also help to provide a benchmark against which potential sales candidates can be evaluated based on the characteristics of existing top-performers.

Depending on the scope of your organisation, the SEIA report can be delivered as a single consolidated report or organised according to geography, business unit and so on - particularly useful if the different business units have significantly different sales systems and processes.

In addition to a highly detailed report - typically running to more than 100 pages - the SEIA findings are also delivered as an editable spreadsheet allowing the information to be sorted, filtered, sliced, and diced in whatever format makes most sense.

Preparing the ground

Before we can initiate the evaluation, we'll want to learn more about your organisation. This involves preparing a list of participants, announcing the programme, and completing a handful of simple profiling documents - sales profiles for each key role in your organisation, and simple definitions of your key systems and processes, and your management strategies.

We'll also ask you to describe your type of business and the category of products and services you sell so that we can tailor the assessment questions appropriately.

Involving Sales Managers and Leadership

The support of your sales management and leadership is critical to the success of both the evaluation process itself and the subsequent development initiatives that follow from the analysis. You should not proceed with the exercise unless you are confident of their active and visible support, and you should be prepared to help them to articulate the personal and organisational benefits of the programme to both the participants and the organisation at large.

Announcing the programme

We suggest you announce the programme to participants prior to the actual invitation being sent out (but after you've completed the preparation items detailed in the rest of this section).

It's important to position the programme as something each participant will benefit from in terms of their personal development. The following template (or a variation thereof) can be used to announce the programme to everyone who will be participating - typically a few days before the invitations are sent out:

> I'm pleased to announce - as part of [Company]'s commitment to your continuous personal development - that we have engaged Bob Apollo of the Inflexion-Point sales effectiveness consultancy, a partner of the Objective Management Group, to help us implement OMG's widely acclaimed sales evaluation and improvement analysis within the organisation.
>
> This will involve you completing a detailed on-line personal assessment. This will in turn generate a series of recommendations that will help to shape both our individual and collective development priorities.
>
> It is important that everyone participates in the process, and that you answer all the questions openly and honestly. You should expect the resulting analysis to reflect both positive feedback as well as areas for improvement that - if mastered - will serve to increase your sales effectiveness. We intend to use the recommendations to help inform your personal development priorities and plans, as well as identifying areas where the whole team could benefit from targeted skills development.
>
> You'll receive a separate invitation with the link and instructions. We will of course be sharing your results with you once the exercise has been completed.
>
> Regards,
>
> [Sponsoring Executive]

Identifying the participants

You'll need to complete a simple spreadsheet of all the people to be evaluated including email addresses, the type of evaluation (sales leader / sales manager / salesperson), which Selling Profile you want them evaluated against (see below), who they report to, their current annual quota, and **-** optionally **-** whether they are currently regarded as a satisfactory performer or not.

Selling Profile(s)

The Selling Profile (here's a sample) summarises the characteristics of each key role type in your sales organisation in terms of the nature of the role, degree of difficulty, required qualities and so on. For example, depending on the nature of your organisation, you might have different profiles for new business salespeople, account managers, partner managers and so on.

It's important not to over-fragment these different role types **-** for example, where several job titles share the same basic expectations, they are usually best represented by a single Selling Profile.

> **What is it?** The Selling Profile is a short questionnaire that asks questions such as who the salespeople call on, how much resistance the salespeople face, what type of competition might be involved, the nature of the sales cycle, and the amount of hunting required.
>
> **How is it used?** Each salesperson needs to be linked to a Selling Profile. We then compare each individual's history/experience with the requirements in the Selling Profile to calculate our compatibility finding **-** how compatible each salesperson is with the requirements of their particular role in your sales organisation.
>
> **How many should you set up?** If everyone in the sales organization sells into broadly the same environment (buyer resistance, competition, sales cycle, hunting, etc.), then you only need a single Selling Profile. Alternatively, if different groups of salespeople have very different roles and expectations, you would want to complete multiple Selling Profiles.
>
> **Who should complete it?** The sales manager or leader with the best understanding of the practical expectations of the role.

Industry Questions

The assessment asks salespeople for their level of agreement with a number of statements which need to be customised to reflect your business environment with short phrases which describe your type of business and the type of products or services you sell, for example:

- "**Type of business**" is usually a generic category such as "office software", "industrial equipment", "IT services" and so on
- "**Products or services you sell**" are usually more specific such as "email management solutions", "retail till systems", and so on

Basically, we're looking for the shortest relevant summary description of these two elements **-** for a few words rather than a long sentence.

Systems and Processes

The Systems and Processes profile (here's a sample) summarises the mechanisms and supporting systems (such as CRM and other systems, key metrics and so on) that you use to underpin the success of your sales organisation.

What is it? The Systems and Processes is a short questionnaire that asks questions about such topics as compensation, planning, tracking, and sales automation. A printable version of the Systems and Processes can be provided.

How is it used? The answers from the Systems and Processes are reported in the SEIA chapter "Do Our Systems and Processes Support a High-Performance Sales Organization?" with scores in 15 different areas in the categories of Growth, Coaching, Motivating, Recruiting, and Accountability.

How many should you collect? Each SEIA can only include one set of Systems and Processes. If a sales organization has multiple branches with unique Systems and Processes, you should split the analysis across separate SEIAs.

Who should complete it? The highest-level leader of the sales organisation should usually complete the questionnaire.

Management Strategies

The Management Strategies profile (here's a sample) summarises the approaches, strategies, and tactics you expect your sales managers to employ to ensure the success of their teams.

What is it? The Management Strategies is a short questionnaire that asks questions covering topics such as compensation, the responsibilities of the sales manager, training, sales tools, and market strategies. A printable version of the Management Strategies can be provided.

How is it used? Each sales manager needs to be linked to a Management Strategies profile. When sales managers complete their individual evaluation questionnaire, we ask them the same strategy questions. We then compare the individual's answers to the answers from the company's Management Strategies to calculate our Alignment finding.

How many should you collect? Usually, all of the managers in the sales organization are analysed against the same Management Strategies, but you can complete multiple Management Strategies if needed. For example, if a sales organization has two branches each with a separate sales leader, you might decide to capture two Management Strategies if their approaches are different.

Who should complete it? Usually, the sales leader who the sales managers report to will complete the Management Strategies. If the management strategies are instead being completed by one of the sales managers, then we do not measure that manager's Alignment (as we would be comparing them against their own answers).

Pricing model - sales team evaluations

Sales team evaluations are affordably priced based upon:

- The number of participants being evaluated
- The number of SEIA reports required

We'll be happy to provide a quotation based on your requirements (see "find out more").

Conducting the evaluation

Participants can choose to take their evaluation in a range of common business languages. Once the evaluation process has been configured to reflect your requirements (which takes just a few days), we'll be ready to invite the salespeople to take part - just as soon as you give us the go-ahead.

We recommend:

- Asking salespeople to complete the evaluations within a finite period of time - by a specific date, which should normally be no more than 5-7 days after the invitation is sent, and can be set as a shorter deadline
- Asking salespeople to block out a suitable period of time (most participants typically take around 45-50 minutes) and to find a quiet location where they can complete the exercise without interruption or distraction
- Encouraging them to be completely honest in their answers and not to anticipate how you would expect them to respond

It is important that participants are encouraged to follow these guidelines to the best of their ability.

OMG measures the time taken, and number of breaks in the process and any inconsistent answers and uses these to assess the likely accuracy and reliability of the participant's responses.

Sending out the invitations

We recommend that OMG sends out the invitations on your behalf. However, you may want to also send out your own note to the participants shortly in advance of the agreed launch date and time - here's a template you might like to use:

> You will shortly receive a personalised invitation to participate in Objective Management Group's sales assessment process.
>
> It is important that you complete the exercise as soon as possible, and no later than [date]. The exercise itself should take between 45-50 minutes to complete.
>
> In order to ensure that your findings are as accurate as possible:
>
> - Please block out a suitable amount of time to allow you to finish the exercise in one uninterrupted session
> - You should choose a quiet, distraction-free environment that will allow you to concentrate exclusively on this task
> - Salespeople will be asked to record two short videos: please record your responses as if you were answering a customer question on the topic "off the cuff"
> - Please do not overthink your answers, or attempt to "game" the system by responding with what you think is expected - be honest
> - If you have to take a break for any reason, please resume as soon as you can and complete the exercise
>
> We will of course be sharing your results with you and using them to inform your personal development plan once the whole exercise is completed.
>
> Please relax and enjoy the process
>
> Regards,
>
> [Sponsoring Executive]

Monitoring progress

We will monitor the progress of the evaluations on your behalf and identify any participants who have either not started or failed to complete their assessments so that you can follow them up.

Your first-level managers will have a key role to play in ensuring we maintain momentum in the process: you need to ensure that they are fully on-board with the programme and are actively encouraging their team members to complete their assessments sooner rather than later.

We won’t be able to process the consolidated SEIA report until all the participants have completed the exercise, so you might want to remind any laggards that the exercise isn’t just for their benefit, but also for the benefit of all of their colleagues, and that any delay in gathering the inputs simply delays the resulting training and coaching initiatives.

Presenting the results

The key deliverables from the exercise will be made available online and include:

- The **Sales Effectiveness and Improvement Analysis** [**SEIA**] **-** a detailed and comprehensive report (here's a sample) and accompanying **analysis spreadsheet** (here's a sample) that captures the key findings in detail, and seeks to answer questions such as:
  - What is the upside opportunity to be expected from implementing the recommendations?
  - Are our salespeople well-suited to their role?
  - What are our current sales capabilities?
  - Why aren't our salespeople generating more new business?
  - Are our salespeople reaching the actual decision makers?
  - Are our salespeople able to sell consultatively?
  - How effectively are our salespeople selling value?
  - How can we close more sales?
  - Do our systems and processes support a high-performance sales organisation?
  - Are we being consistent with our sales process?
  - Are leveraging sales technology effectively?
  - How does sales leadership impact the performance of our sales organisation?
  - How much more effective could our people be?
  - What are our short-term priorities for accelerating sales growth?

- **Each participant** is emailed a link that invites them to log-in to their results and gives them access to:
  - A short video highlighting the findings, and guiding them in how to interpret the findings
  - Their personalised **Insights** report (a ~19-page PDF document)
  - A fillable comments and questions form
  - A fillable personal action plan template

- In addition, **managers** are provided with:
  - Access to their salespeople's reports
  - A coaching dashboard for each salesperson
  - A summary coaching dashboard for their team
  - (Optionally) a spreadsheet of the overall findings

Here's a full list of the deliverables and intended audiences:

Deliverable	Intended audience
SEIA report	Executive Leadership, Training and Development
Analysis worksheet	Executive Leadership, Training and Development
Companion presentation	Executive Leadership
Results links	Used to distribute individual results
Coaching dashboards	Line managers
Personal video intro	Participants
Insights reports	Participants
Comments and Questions	Participants (fillable form)
Action plan	Participants (fillable form)

Reviewing the findings

Once the evaluations have all been completed, it takes us just a few days to process the inputs, generate the reports and review the patterns revealed in the analysis before we are ready to present the findings to you.

This is typically delivered as a formal presentation to the sponsoring executive(s) and normally takes a couple of hours.

We will discuss the how to apply the key findings from the exercise, including how to share them with the participants and our short-term recommendations for action.

The slide deck used in the presentation of findings will then be shared with the executive sponsor(s), together with the SEIA reports and the detailed analysis workbook.

Following the presentation and discussion of the findings, we recommend the following approach:

Leadership

- Review the SEIA report and analysis worksheet in detail, together with your sales manager's insights reports and coaching dashboards
- Start to identify the most obvious focus areas for developing the effectiveness of your sales organisation - and then validate this in discussion with your sales managers
- Implement appropriate training and development initiatives

Sales Managers

- Review their insights reports, those of their salespeople and their coaching dashboard
- Distribute their salespeople's reports links and book a review session with each of them
- Develop and implement personal development plans with each member of their team, reviewing progress at regular intervals

Salespeople

- Ask them to thoughtfully review their insights reports, prepare their questions and action plan, and have an initial 1:1 review session with their manager
- Ensure that they feel a sense of ownership of their own personal development plans and priorities, and encourage them to put them into practice

Sharing the results with the participants

The individual findings are intended to be shared with the respective participants after the SEIA have been presented and discussed with the executive sponsor(s).

This is achieved by providing each participant with a link that enables them to log-in to their results, including a brief personalised introductory video summarising the highlights and how to interpret them, their personal Sales Insights report, a comments form, and an action plan.

We recommend that sales managers read and review each person's report and then schedule a review meeting with each participant after each person has had the chance to digest the findings, and that the manager asks them to complete the comments form in advance so that they come to the discussion having reflected on and structured their reactions.

These personal reviews should be conducted relatively quickly - we recommend scheduling within 7-10 days after sharing the results, while the findings are relatively fresh in people's minds.

Following this personal review, we recommend that the sales manager asks each salesperson to come up with a personal action plan that includes SMART objectives and goals and that they subsequently review and agree this with the manager. This personal action plan should provide one of the key inputs to the manager's coaching programme with the individual.

Here are some suggestions for guiding the participants as they read and reflect on their report:

- Thank each participant for taking the time to complete their online evaluations. Explain why it was so important to take this step
- Explain that no evaluation is 100% accurate and you're sure that OMG's evaluation is no exception - helping to lower any resistance to potentially uncomfortable feedback
- Ask them to read the entire document through to the end without judging
- Ask them to return to the beginning and read each finding on its own. If they have a question or comment, need more clarification, or don't agree with a finding, they can use the questions/comments page to express themselves
- Ask them to complete the action plan in the Salesperson plan document and return that, along with the questions and comments to you within 3 days

Implementing the recommendations of the SEIA process

Of course, the true value of the Sales Effectiveness and Improvement Analysis comes not from the report itself, but from putting the findings and recommendations into action.

Here's how we recommend you achieve this:

Collective sales performance improvement

Establish the key organisation-wide priorities for improvement from the summarised findings of the SEIA, paying particular attention to:

- Factors that are flagged as **red** or **amber**
- Factors where a significant percentage of the sales organisation show clear room for improvement

Identify those areas that lend themselves to team skills development and implement an appropriate **training programme**. Topics will often include, but may not be limited to:

- Clearer targeting of ideal customers
- Effective planning
- Prospecting/hunting
- Opportunity qualification
- Stakeholder management
- Consultative selling, including conversational skills and objection handling
- Creating customer-specific value
- Presentation skills
- Closing

Ensure that the above programmes are reinforced with appropriate tools, processes, and systems. Elements will often include, but may not be limited to:

- The creation of simple sales tools to support the above
- A review of CRM configuration, stage definition, and so on
- A review of sales management reports and metrics
- A review of sales team review processes and expectations (such as QBRs)

Management development

The SEIA report often identifies areas where your front-line sales managers - if better trained and equipped - could play a significant role in helping to ensure that their direct reports achieve their full potential as successful salespeople.

Key elements of an effective front-line sales management development programme often include:

- Developing their **coaching** skills and abilities
- Helping them to understand the most effective ways of **motivating** each member of their team
- Enabling to develop their team's sense of **responsibility** and **accountability**
- Equipping them to make better **recruitment** and hiring decisions
- Giving them a framework for their team's **personal development plans**

Individual sales performance improvement

In addition to the above team-wide initiatives, the individual evaluations will highlight specific individual priorities for development. While some of these will be addressed through group training, others will benefit for a coaching approach. These typically include:

- Skills that are not prioritised for group training
- Behavioural or attitudinal issues that require a personalised development approach

These should provide the inputs for a mutually-agreed, regularly-reviewed personal development plan backed by regular coaching interventions from the manager.

It is very important that the participants feel a strong sense of ownership of their personal development plan and that they take the initiative in looking for ways to progressively enhance their skills, knowledge, and competencies.

FAQs about the evaluation process

FAQs from Participants

Here are a few of the most common questions from participants about the process which you can share or use to respond to specific questions:

Q: Why are you conducting these evaluations?

A: We are committed to implementing an evidence-based sales performance improvement programme and the evaluation process is a key element of making sure that we focus on the right priorities in order to improve both the collective and individual performance of the team. The resulting programmes will be designed to improve your effectiveness as a salesperson

Q: What are the outputs from the programme?

A: There are two key outputs: Firstly, a sales team evaluation in the form of a Sales Effectiveness and Improvement Analysis report which will identify the highest potential areas for sales training across the group and secondly, individual Sales Insights reports that will form the basis for personal development plans

Q: What will I receive?

A: You will receive a comprehensive personal Sales Insight report that will help you better understand your current strengths and weaknesses, which provides the foundation for your personal development as a salesperson and will help to inform the coaching you receive from your manager

Q: How long will the evaluation take to complete?

A: The average time is between 45-50 minutes

Q: How do I take the evaluation?

A: You'll be given a link to the evaluation. Once you've signed-in, you'll be asked a series of on-line questions and salespeople will also be asked to record two short videos

Q: How should I prepare for the evaluation?

A: The most important thing is to find a quiet, distraction-free environment where you will not be disturbed and will be able to complete the process in one unbroken session. You should also ensure that you are set up to record the short videos when prompted to do so

Q: What happens if I need to take a break?

A: As soon as you are able to resume, please do so, and try to ensure that there will be no further disturbances. The results of the evaluation are most accurate when completed in one session

Q: How should I answer the questions?

A: It is important that you do not "over-think" your responses. Answer quickly and choose the response that seems most accurate and appropriate to you, rather than trying to guess how you are expected to respond

Q: Is my information secure?

A: The information will be held to the same high standards you would expect from any HR-related programme

FAQs from Managers

Q: Why do you ask for quota information?

A: This is used in a couple of places:

- Firstly, we ask the salespeople to briefly describe a handful of their opportunities, so knowing the quota allows us to understand the relative importance of these opportunities to their targets
- Second, we use the consolidated quota targets to calculate the overall potential for improvement across the whole team if the recommendations are put into practice

Q: What do you mean when you ask (in the participant data collection sheet) whether a participant is regarded as a "performer", and how do you use this information?

A: It is up to the organisation to define what they mean by being a "performer" - it may simply be whether the participant is achieving their defined performance targets (such as quota) or it may be whether the participant is performing to the wider expectations of a successful performer in the role. Whichever definition you choose to use, it should be applied consistently

We also ask each participant whether they regard themselves as a "performer" and we compare their responses to the opinions of their managers. This can provide valuable input when coaching people who have a different perception of their success in the role from their management

Why screen potential new sales hires?

The same evidence-based, sales-specific principles that have proven so effective in evaluating the attitudes, behaviours, and competencies of existing sales teams can also be applied to the recruitment of potential new sales hires.

The costs and consequences of making a bad sales hire have never been greater. In addition to the waste of management time, here are just some of the other potential impacts:

- **Financial costs**: Hiring and training a new employee is expensive. These costs include recruitment fees, onboarding, and training expenses - and if the new hire doesn't work out, the organisation will need to spend additional resources to find and train a replacement
- **Lost sales opportunities**: A bad sales hire usually results in missed sales targets and lost revenue. This may happen due to the new employee's inability to close deals, poor customer relationships, or a lack of understanding of the company's products or services
- **Reputational damage**: An ineffective salesperson can damage a company's reputation. If they fail to act professionally, treat clients well or provide accurate information, clients may become dissatisfied and spread negative word-of-mouth, which can have long-term consequences
- **Reduced productivity**: When a bad sales hire doesn't perform well, it often affects the productivity of the entire team. Other team members may have to spend extra time training, supporting, or fixing problems caused by the underperforming employee
- **Staff turnover**: If a bad sales hire causes dissatisfaction or tension within the team, it can lead to negative team moral and regretted employee turnover. This can disrupt team dynamics and result in even more recruitment and training costs
- **Opportunity cost**: When a company hires someone who turns out to be a poor performer, it often means they passed up on potentially better candidates. The opportunity cost of not hiring a more suitable candidate can be significant, especially if the bad hire negatively impacts the business in multiple ways

You might well be able to think of other negative consequences. That’s why, to minimize the risks associated with hiring the wrong salesperson, we believe it’s essential to invest in an evidence-based recruitment and selection process - something that goes beyond simply reviewing the candidate’s CV, subjecting them to a series of interviews and taking up references.

HR departments often promote the use of traditional behavioural or personality tests, and whilst these can sometimes provide some generic indications, they typically fail to uncover many of the specific factors that so significantly influence sales performance. OMG’s evidence-based, sales-specific approach has a far stronger predictive value than these generic tests.

The results speak for themselves: within 12 months, more than 9 out of 10 of candidates that were hired after being recommended by an OMG Candidate Assessment are rated as having positive on-the-job performance, while more than three-quarters of the candidates that were not recommended by an OMG Assessment but were - for whatever reason - subsequently hired have either not been retained or are rated as poor performers.

It's frequently said (with considerable justification) that the one thing that even some bad candidates for sales roles can do is to come up with an apparently solid CV or learn how to “sell themselves” at interview. They have learned to master the “show” without having any of the required substance.

That’s why - when considering all the potential consequences of making a bad hiring decision, we believe OMG’s candidate assessments ought to form the evidence-based foundation of any serious sales recruitment process.

The candidate screening process

We recommend that you screen all credible candidates - rather than restricting the exercise only to "short-listed" finalists:

- Serious candidates will see the process as a sign of your professional determination to make the best possible hiring decision
- You will inevitably learn valuable information about each candidate that might not have otherwise come to the surface simply by reviewing their CV or application form
- The insights provided are likely to influence your perception of the relative suitability of each of the candidates, and will help to identify and prioritise the areas that you need to explore during the subsequent interview and referencing process

Profiling your ideal candidate

We'll ask you to complete a role specification for each role you intend to hire (here's a sample) - different templates are used for sales, management, and leadership roles.

Amongst other things, we'll want to know the nature and anticipated difficulty of the role, the type of solution being sold, the type of selling involved (i.e., face-to-face vs. online), the level of decision-makers you expect them to sell to, the degree of resistance and competition you expect them to face, price points, typical deal values and sales cycle lengths.

We'll also want to understand things like your selling environment, your position in your market, the extent to which the salesperson is expected to prospect for themselves or to follow-up already-generated leads, your management style, your approach to compensation, the balance between new business and existing accounts, the extent to which partners are involved, and so on.

We can further customise the profile based on the key qualities and competencies demonstrated by your existing top performers. Taken together, these factors will enable us to understand the most important attitudes, behaviours and competencies needed to succeed in the role.

The screening process

Each candidate will be invited to complete an online questionnaire - similar to the one used for evaluating your existing staff. The exercise typically takes 45-50 minutes.

Once the candidate has completed the exercise, you'll receive a detailed report on each candidate together with our recommendation whether they are worth considering based on whether the candidate meets OMG's and your own criteria for the role.

The report will assess their will to sell - a combination of their desire, commitment, outlook, motivation, and responsibility as well as their coachability, ability to learn and potential for development. It will also explore their core Sales DNA - their need for approval, ability to control emotions, beliefs, supportive buying behaviour, comfort discussing money, and ability to handle rejection.

Depending on what you have told us about your prioritised requirements for the role, we'll also assess their hunting, qualifying, consultative selling, presentation, negotiation and closing competencies as well as their ability to reach decision-makers, build relationships, follow sales process, embrace sales technology, leverage social selling, and so on.

The report is an invaluable aid to identifying your highest-potential candidates and determining which areas you will want to explore further as your recruitment process progresses towards a decision.

On-boarding and development

Once you have identified your preferred candidate and successfully brought them on-board, we will upgrade their profile to a full Insights Report, which will provide you with an excellent basis for prioritising their on-boarding and personal development programme.

Pricing model - new hire screening

New hire screening is affordably priced based upon the number of positions you intend to fill during the coming 12 months, regardless of the number of candidates interviewed for each position.

Discounts are available for quantity.

We'll be happy to provide a quotation based on your requirements (see "find out more").

Find out more

About Inflexion-Point

With locations in the UK and Spain, Inflexion-Point Strategy Partners (www.inflexion-point.com) are widely recognised as experts in complex B2B sales and as thought leaders in Outcome-Centric Selling® - a revolutionary approach to selling that focuses on identifying, shaping and delivering on the customer's desired business outcomes and not just on promoting the vendors so-called "solutions".

Contact us

If (as we hope) you would like to find out more, please give Bob Apollo of Inflexion-Point a call on +44 7802 313300 during UK business hours, email us at omg@inflexion-point.com or set up a Zoom via www.inflexion-point.com/book-a-call.

Useful links

Here are the links to the documents referred to in this guide:

- Sample Sales Insights report
- Sample Sales Management Insights report
- Sample Sales Leadership Insights report
- Sample Sales Effectiveness and Improvement Analysis [SEIA] Report
- Sample SEIA Analysis spreadsheet
- Selling Profile template
- Systems and Processes template
- Management Strategies template
- Candidate Role Specification

You can also learn more about the statistics behind the science here or register for a free candidate assessment here.