



Building Your Success Together

Sales Professional Effectiveness Profile

The Sales Professional Effectiveness Profile is designed to assist managers in identifying the overall effectiveness of individual employees. Specifically, it will provide guidance in determining the optimal levels of “coaching” for various categories of employees.

INSTRUCTIONS

Identify the Sales Professional that you wish to profile:

Name

Date

As you read each of the statements on the following pages, keep that particular Sales Professional in mind. Respond to each statement by drawing a circle around the number that indicates the degree to which you agree with that statement. (On a scale of 0 to 5; zero is strong disagreement, five is strong agreement).

As an accurate assessment is very important, be as *objective* as possible as you respond to each item. Guard against the natural tendency to assess the Sales Professional based on their personality or your personal positive or negative feelings towards that person. Focusing on one item at a time and sticking with your initial answer for each question will help you to make your most objective assessment.

Sales Professional Profiling Questions

0	1	2	3	4	5
Strongly Disagree	Disagree	Somewhat Disagree	Somewhat Agree	Agree	Strongly Agree

This Sales Professional:

- | | | | | | | |
|--|---|---|---|---|---|---|
| 1. Is usually resourceful in finding ways to overcome obstacles and objections in developing business. | 0 | 1 | 2 | 3 | 4 | 5 |
| 2. Will probably receive at least one or more promotions in this organization within the next 18 months. | 0 | 1 | 2 | 3 | 4 | 5 |
| 3. Usually produces 100% or more of the required sales target/goal/quota. Always exceeds activity goals. | 0 | 1 | 2 | 3 | 4 | 5 |
| 4. Invests personal time in learning products and sales skills separate from what the organization supplies. | 0 | 1 | 2 | 3 | 4 | 5 |



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5. Performs basic sales skills in at least an above average manner (prospecting, positioning, writing, closing, etc.)	0	1	2	3	4	5
6. Is capable of developing innovative tactics and strategies for approaching prospect/client issues.	0	1	2	3	4	5
7. Often discovers ways to do existing processes more effectively than they were being done previously.	0	1	2	3	4	5
8. Is always willing to take on extra work and responsibility.	0	1	2	3	4	5
9. Takes less time/effort than the average sales professional for the same job/task	0	1	2	3	4	5
10. Will probably stay with this organization for two or more years.	0	1	2	3	4	5
11. Plays by the rules and contributes well in tasks requiring teamwork.	0	1	2	3	4	5
12. Has and uses good interpersonal skills and communications skills.	0	1	2	3	4	5
13. Usually does things "right" the first time	0	1	2	3	4	5
14. Has the capacity to grow and keep up with added responsibilities.	0	1	2	3	4	5
15. Would be difficult to replace with someone else who could do his or her job equally well.	0	1	2	3	4	5
16. Displays a high level of commitment and loyalty to the organization. Does not complain but offers answers to corporate challenges.	0	1	2	3	4	5
17. Is so efficient that his or her absence would result in significantly lower productivity in the organization.	0	1	2	3	4	5
18. Could probably find a higher-level job in another organization.	0	1	2	3	4	5
19. Completes sales reports and related administrative tasks on time.	0	1	2	3	4	5
20. Fits in well with the culture of the organization.	0	1	2	3	4	5



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Scoring: The Sales Professional's Effectiveness Profile

Transfer the numbers that you circled in the Sales Professional Profiling Questions section to the appropriate blanks in the boxes below. Then total the scores in each box.

Notice that no blanks are provided on this page for items 4, 8, 12, 16, and 20 as these items reflect the employee's traits.

PRODUCTIVITY

- 1 _____
- 3 _____
- 5 _____
- 7 _____
- 9 _____
- 11 _____
- 13 _____
- 15 _____
- 17 _____
- 19 _____

TOTAL _____

POTENTIAL

- 2 _____
- 6 _____
- 10 _____
- 14 _____
- 18 _____

TOTAL _____



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Effectiveness Profile Matrix

The Sales Professional Effectiveness Profile Matrix is divided into six categories: Star, Accomplished, Marginal, Developmental, Problem Child, and Deadwood.

Mark a point on the vertical axis of the matrix that corresponds to your total in the *Productivity* section you just completed, and draw a horizontal line through that point. Next, mark a point on the horizontal axis of the matrix that corresponds to your total in the *Potential* section and draw a vertical line through that point. The intersection of the two lines you've drawn will indicate in which category of the employee whom you are rating.

For a more detailed analysis of the employee's score, please refer to SDbT's **Profiling Guide for Sales Professionals**. This guide includes a detailed description of both typical and recommended Managerial responses; measures that you as a manager can take toward improving the performance of your Sales Professionals.

Sales Professional Effectiveness Profile Matrix

