



**THE
ADVANCED
SELLING
PODCAST**

Behavioral Assessment (10) *Part 3 of 3*





This document, comes from our sales training curriculum and was recently highlighted on either an episode of The Advanced Selling Podcast or The Ultimate Sales Chick Podcast (Brooke Green).

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Our Trainers



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Behavioral Assessment

The following is a brief behavioral assessment for sales / account people or for sales managers to help understand “gaps in activity.” Our belief is that we can all learn more and be more effective in the sales profession.

Here is our list of 10. Rate yourself between 1-10 (1- “Awful”; 10-“You could teach the course”)

1. **Monthly/Quarterly Contact With Past Clients.** This is the act of reaching out to people who used to work with you—and reigniting conversation again. How proficient are you at this?

Stink

Really Good

1—2—3—4—5—6—7—8—9—10

2. **Current Client Ecstasy..** No, this is not a recreational drug. This is the act of checking back in with clients on a periodic basis (preferably less than annually) and finding out if you’re delivering good value. This doesn’t have to be a survey—it can be you having lunch and talking about your value—and whether they’re seeing it.

Stink

Really Good

1—2—3—4—5—6—7—8—9—10

3. **Speaking Gigs.** Public speaking should be on everyone’s behavior list. Are you speaking to groups right now? If not, rate yourself a 0. Set a goal to get in front of 1 group/month to speak. This could be Rotary, Kiwanis, Chamber, Retired Maidens of the Valley (just for practice of course).

Stink

Really Good

1—2—3—4—5—6—7—8—9—10



4. **Referral Strategy.** This comes as a result of doing good work on #2 above. But do you have your mind constantly on 'referrals'? Are you helping your clients refer you to their associates? Do you make it easy for them to do so? Most businesses thrive on referrals—but most have no good system/strategy to improve it.

Stink Really Good

1—2—3—4—5—6—7—8—9—10

5. **Networking.** Rate yourself here — not on whether you're good at it or not—but on whether you make a conscious effort to be where others are talking business. Rate low if you hate it and thus, never attend events. Rate high if you hate it but go anyway.

Stink Really Good

1—2—3—4—5—6—7—8—9—10

6. **Self-Development.** This is not on any sales manager's list but we think it should be. Skills are your currency for the future. If you are skilled at communicating your value-and self-development will help that--then you'll be in a good position to thrive in this economy. Rate yourself low if you never spend any money on your self for this. Rate high if you are constantly learning.

Stink Really Good

1—2—3—4—5—6—7—8—9—10

7. **Funnel Cleansing.** Reviewing/analyzing your sales funnel is a constant process. Rate yourself high if you have a sales funnel up in your office—or on your laptop. Rate high if you look at it everyday—and use it as a working document. Rate low if you don't know what we're talking about.

Stink Really Good

1—2—3—4—5—6—7—8—9—10



8. Know Why You're Taking Action. This might sound simple, but we're amazed at how few sales people know why they quote, why they meet with prospects, why they reduce price etc, Rate low if you take action but don't ask yourself why you're doing so.

Stink Really Good

1—2—3—4—5—6—7—8—9—10

9. PreCall Preparation. Everyone preaches this but today it's changed. You can do a lot of pre-call prep on Google. In fact, we recommend to our high income clients, that you have a **Google Alert** set up for all of your top clients and prospects—so you know immediately when news breaks regarding their business. Rate high if you have 5-20 Google Alerts. Rate high if you spend 3-5 hours preparing for a one hour sales call. Rate low if you wing it.

Stink Really Good

1—2—3—4—5—6—7—8—9—10

10. Personal Business Plan. This is Bryan's fave. Just like a company should have a business plan, so should you. It should have income numbers, strategy, and daily behavior/activity that you must engage in to get to your number. Rate high if you have a Business Plan that you use all the time. Rate low if you wing it everyday.

Stink Really Good

1—2—3—4—5—6—7—8—9—10



Sales Managers/Leaders

Take the table below and rank your people in each area (1-10). Then you can highlight the areas that cause the most concern—or where there is the most opportunity for growth.

Behavior SKILL	SP 1	SP 2	SP 3	SP 4	SP 5
PAST CLIENTS					
CURRENT CLIENT ECSTASY					
SPEAKING GIGS					
REFERRAL STRATEGY					
NETWORKING					
SELF-DEVELOPMENT					
FUNNEL CLEANSING					
WHY YOU TAKE ACTION					
PRE CALL PREP					
PERSONAL BUSINESS PLAN					



Our Services

Caskey is a sales development firm in Indianapolis. You might know us as podcasters and bloggers but there's a whole lot more behind the scenes to know. We help organizations specifically in many ways:

- Training Sales Teams
- Developing Company Leaders
- Creating Messages of Value
- Designing Successful Sales Processes
- Engaging in High Level Skills Training (Sales, Communication, Process Management)
- Leadership Development (for sales leadership and company leadership)

We do this in the following ways:

Speeches and EVENTS. This includes anything from a 1- hour speaking gigs to 3-day Training Events with your team on your site.

Teleseminars. Many of our clients supplement their face-to-face training with remote work, like teleseminars or webinars. If you have a remote sales team, webinars might be the best ticket.

Personal Coaching. We have an arm of the business totally dedicated to working with people one-on-one (in person or on phone). This is typically for the high achievers who need work at a different level than the entry-level person. The fee for this is \$1500 per time block.

Ongoing Group Sessions. We believe that adults don't learn well in one time events. Instead, they work best when they have a chance to try new things, new thoughts, new tactics and report back to the group and trainer about their success. Our most effective programs are long term and on going in nature. Most of our work with a sales team (#s 5-50) is a minimum of 6-months.



Schedule a Call

If you feel like you'd like to speak to us about training your team or getting coaching for yourself, fill out the following form and fax it to us at **317.575.0186**. Kathy will take the information and arrange a phone call.

Name _____
Title _____
Company _____
Telephone _____
Email _____
Best Time To Call _____

How'd You Hear About Us?

- Podcast
- Blog
- Friend
- Google

Biggest Issue You're Facing—Or Your Team Is Facing (Check all that apply):

- Not generating the type of income for where I am in my life.
- Feel like you're winging your efforts—and results aren't there.
- Not getting to the right person (accept calling on lower level contact people, or can't get to senior management)
- Unable to differentiate your value vs. competition (either because you don't know it, don't believe in it, or can't express it properly.)
- Don't have enough prospecting behavior (not enough new business in pipeline)
- Not prospecting for the right kind of business
- You lose deals in the 11th hour (after a lot of resources invested) that you should not lose
- Your Client Retention suffers (too many clients leave for less formidable competitors)
- Your sales approach does not work to communicate your value effectively.
- Not aggressive enough in new business scenarios (feel like you're commoditized, or might have non-assertive sales people)
- Have non-sales people attempting to sell (usually some kind of subject matter expert, or technical seller) and they are struggling to change their mindset. This applies to account managers as well, or anyone who has customer contact.
- You have no documented sales process (therefore, the prospect controls process and has power)
- You (your people) feel like they're negotiating from weakness—get commoditized.
- Goals get set but not achieved.
- Too much discounting to get the business.
- Sales costs are too high because of wasted resources, long selling cycles, etc.
- Other _____
- Other _____