

Sample Job Description ABC Materials Handling

Position: Sales Consultant

Reports to: Vice President – Sales

Summary of Position

This individual is responsible for increasing sales of all lift trucks and support services available from ABC Materials Handling. Achieving agreed upon sales results is the number one priority of this position.

I) Knowledge – Expectations/Behaviors

- Detailed knowledge of our equipment offering
- Thorough understanding of competitor's equipment
- Complete understanding of all value added services our Dealership offers
- “Working knowledge” of our support system and how to perform laptop computer functions, including:
 - Web searches
 - E-mail
 - Basic Word Processing/Proposals/Letters
 - PowerPoint Presentations
 - Navigation within Multimedia sales tools
 - Customer data base management
- Memorization of our “Value Proposition” and the ability to communicate it accurately – anytime and anywhere!

Additions:

2) Skills – Expectations/Behaviors

- Very skilled at identifying target prospects and creating Strategic Prospecting Action Plans
- Very skilled at using the phone, e-mail, regular mail to make initial contact with prospects and establish rapport to obtain face-to-face appointments
- Establishing call objectives before every sales call
- Completing “initial” sales calls with prospects to communicate our value proposition, generate interest and agree on “Next Steps”
- Asking “Consultative Questions” to fully determine challenges, buying motives, decision making, financial constraints and a sense of urgency for making decisions
- Very skilled at delivering “Recommendations” to solve customer challenges
 - Verbally – in person and over phone
 - In Written “Consultative” proposals
- Very proficient at explaining (and quantifying) the total value associated with selecting our dealership and the products we sell

- Very comfortable with when and how to use a laptop-based multimedia sales tool in front of customers in one-on-one and group settings
- Excellent at “Overcoming Objections” using a very professional, consultative approach
- Very skilled at asking trial closing questions using an “alternative of choice” “direct”, or “assumed” closing technique that continually focuses on advancing the sales process to the next step
- Completing all follow-up activities, correspondence and support to ensure we maintain strong relationships with all customers
- Very proficient at all communication skills – verbal, written, group presentations, etc.
- Finally, it is expected that a Sales Consultant act and dress professionally and is fully prepared at all times. Remember the rule of “Seven Ps” – Prior, Proper, Preparation, Prevents, Pitifully, Poor, Performance. Always be prepared for all sales calls with:
 - Notes from previous sales calls
 - All sales tools, literature, selling tools
 - Laptop fully charged and operational

Additions:

3) Attitudes and Integrity – Expectations/Behaviors

- Honesty, ethics and integrity are to be displayed at all times
- Positive thinking and identifying solutions to customer problems are extremely important to this position
- A “Never give up...Never surrender” attitude should be displayed when it comes to all selling activities. Persistence will make a huge difference towards achieving sales success
- Team work and demonstrating “team-player” behaviors is an absolute must for success in this position
- Sharing “Best Practices” with peers in sales meetings and in one-on-one discussions is a requirement of this job

Additions:

Sales Champion – Action Plan Part I

Name: _____

Today's Date: _____

- 1) Identify a date to create a “Sales Consultant” Job description.

Target Completion Date _____

- 2) Identify a date for writing the “changes” your Sales Reps need to make in order to become Sales Consultants.

Target Completion Date _____

- 3) How do you want to communicate your “Expectations” to the sales staff?

- 4) Identify a date for communicating your “Expectations” to all Sales Reps.

Target Completion Date _____

Sales Champion – Action Plan Part 2

Name: _____

Today's Date: _____

Training Session 1: Pilot Truck Orientation

Goals: _____

Target Date: _____

Location: _____

Time Required: _____

Training Session 2: Innovations / Sales Certification Test (using Lee Tracy DVD)

Goals: _____

Target Date: _____

Location: _____

Time Required: _____

Training Session 3: How to Sell Value

Goals: _____

Target Date: _____

Location: _____

Time Required: _____

Training Session 4: Creating Strategic Prospecting Action Plans

Goals: _____

Target Date: _____

Location: _____

Time Required: _____

Sales Champion – Action Plan Part 3

Name: _____

Today's Date: _____

- 1) Identify a date to complete a Coaching Profile for each Sales Rep and Coaching Grid.

Target Completion Date _____

- 2) Which Rep is your highest priority to complete a “Work With” coaching session?

Name: _____

Why is he/she your top priority? _____

- 3) Identify dates for completing “Work With” sessions for all of your Sales Reps.

Name: _____ Date: _____

Name: _____ Date: _____

Name: _____ Date: _____

Name: _____ Date: _____

Name: _____ Date: _____

Sales Champion – Action Plan Part 4

Name: _____

Today's Date: _____

1) List the Actions you will take to “Lead by Example”:

2) What obstacles must you overcome to change the behavior of your Sales Reps to be true “Consultants” and how will you overcome these obstacles?

Obstacle

Solution

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

3) When and how often will you conduct Performance Reviews with your Sales Reps?

When will you complete your next Performance Review with each Sales Rep?

How often will you conduct Performance Reviews?_____

Sales Champion – Action Plan Part 5

Name: _____

Today's Date: _____

- 1) What "Recognition and Reward" techniques will you use to encourage behavior change?

- 2) Identify a date for implementing your Recognition and Reward techniques.

Target Completion Date _____

- 3) Identify how you will communicate successes throughout your organization.

**Completing a “Coaching Profile”
for your Sales Personnel**

Frequency Values

KNOWLEDGE/SKILL PROFILE

(Name) _____

Always
Usually
Often
Sometimes
Rarely
Never

THIS Sales Person:

- | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--|
| ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | 1. Has a specific objective for each sales call |
| ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | 2. Bridges into business conversation or sales presentation professionally, at the appropriate time |
| ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | 3. Asks relevant questions to learn about customer needs or to get update on customer changes, applications and problems |
| ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | 4. Selects specific benefits and tailors the presentation to meet customer needs |
| ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | 5. Reinforces benefits with sales aids, data, and successful experience of other customers |
| ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | 6. Responds tactfully to questions, comments or objections |
| ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | 7. Provides feedback to the customer to ensure understanding |
| ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | 8. Asks for the order, or a commitment, at the appropriate time |
| ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | 9. Has a good understanding of the customer's business, products, needs, costs and objectives |
| ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | 10. Knows his or her product lines |
| ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | 11. Sells the full line of products |
| ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | 12. Performs value-added services (such as site surveys, Fleet analysis, problem-solving, etc.) |
| ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | 13. Follows up to provide service and training after the sale |
| ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | 14. Maintains accurate account records and updates them regularly |
| ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | 15. Develops sales strategies for each account |

☐ ☐ ☐ ☐ ☐ ☐

x x x x x x

5 4 3 2 1 0

☐ + ☐ + ☐ + ☐ + ☐ + ☐

- Add the checkmarks in each column and enter the total in the box under the line.
- Multiply each total by the number below the "x" in the same column, and enter the total in the box below the second line.
- Add the totals horizontally and enter the sum in the box at the bottom

Total Knowledge/Skill Score

Frequency Values

COACHABILITY PROFILE

Always Usually Often Sometimes Rarely Never

☐ ☐ ☐ ☐ ☐ ☐

1. Listens to the opinions of others

☐ ☐ ☐ ☐ ☐ ☐

2. Attacks the job, wants to be the best all the time

☐ ☐ ☐ ☐ ☐ ☐

3. Grasps an idea the first time he or she hears it

☐ ☐ ☐ ☐ ☐ ☐

4. Follows instructions well

☐ ☐ ☐ ☐ ☐ ☐

5. Discusses business problems with peers

☐ ☐ ☐ ☐ ☐ ☐

6. Is very flexible

☐ ☐ ☐ ☐ ☐ ☐

7. Asks me how I would handle a situation

☐ ☐ ☐ ☐ ☐ ☐

8. Does not worry about his or her ego

☐ ☐ ☐ ☐ ☐ ☐

9. Views his or her position as a career and wants to get ahead

☐ ☐ ☐ ☐ ☐ ☐

10. Respects my opinion

☐ ☐ ☐ ☐ ☐ ☐

11. Is a good listener

☐ ☐ ☐ ☐ ☐ ☐

12. Learns from his or her mistakes

☐ ☐ ☐ ☐ ☐ ☐

13. Is at or above quota on a consistent basis

☐ ☐ ☐ ☐ ☐ ☐

14. Is cooperative and participative at group meetings

☐ ☐ ☐ ☐ ☐ ☐

15. Adapts well to new situations and change

☐ ☐ ☐ ☐ ☐ ☐

x x x x x x
5 4 3 2 1 0

☐ + ☐ + ☐ + ☐ + ☐ + ☐

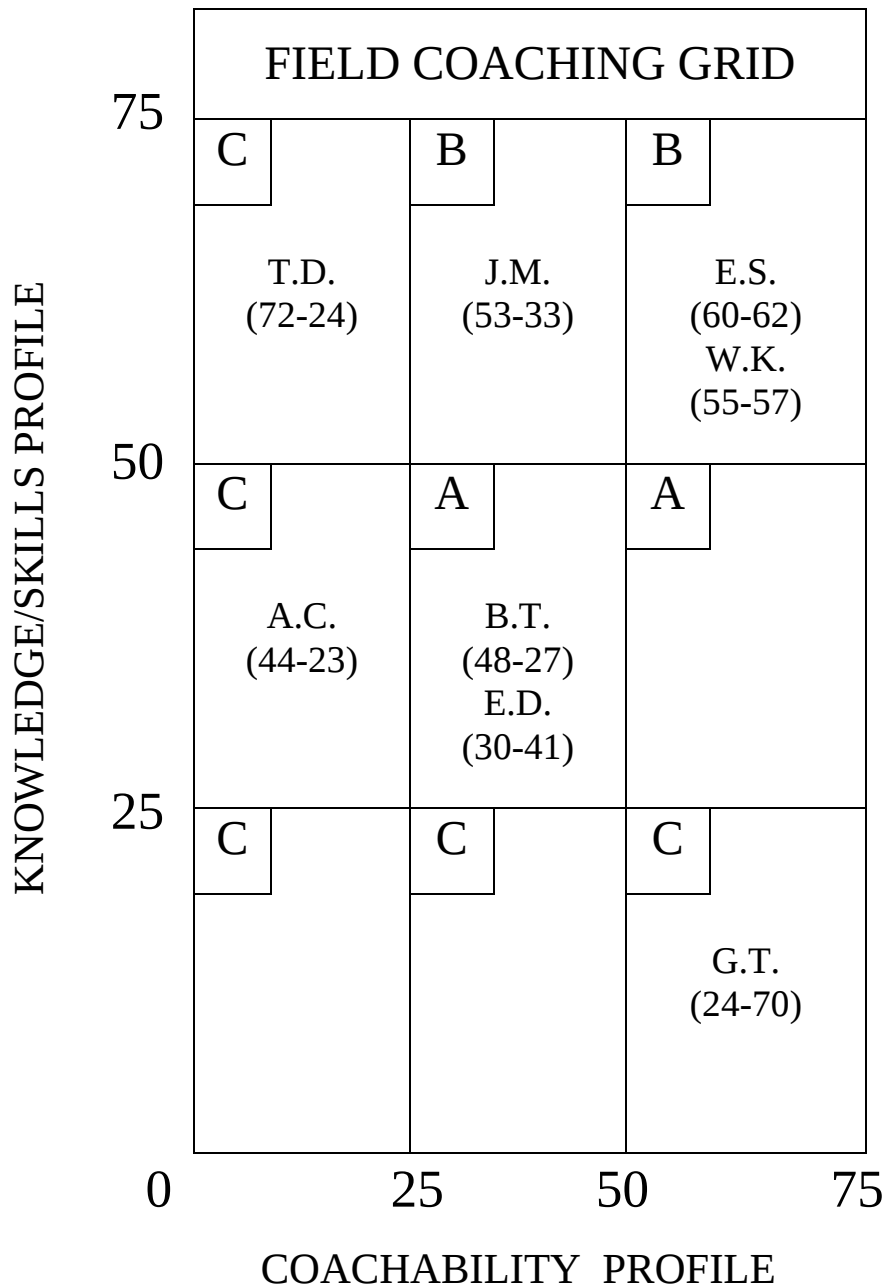
- Add the checkmarks in each column and enter the total in the box under the line.
- Multiply each total by the number below the “x” in the same column, and enter the total in the box below the second line.
- Add the totals horizontally and enter the sum in the box labelled “Total Coachability Score”

Total Coachability Score

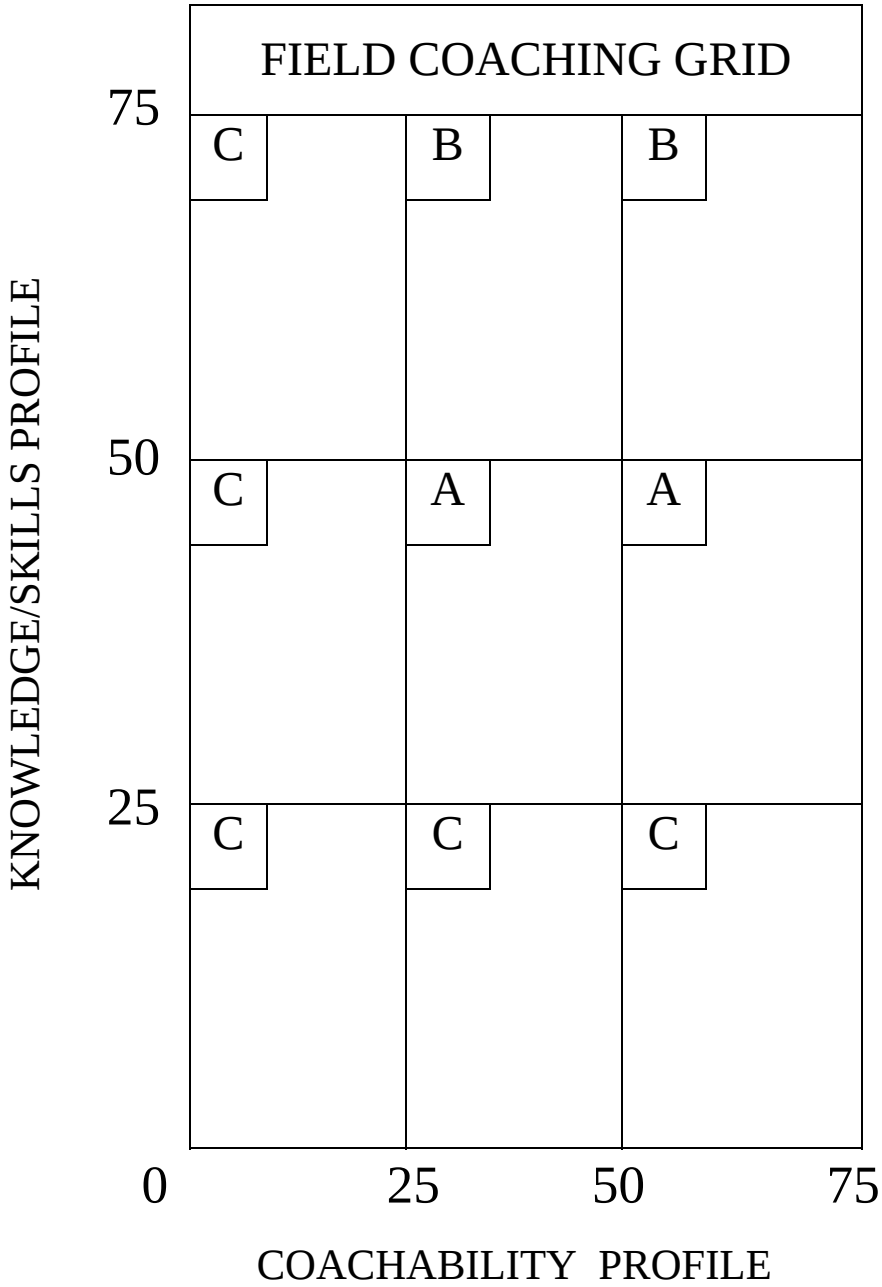
Total Knowledge/Skill Score (from other side)

Coaching Sales Skill Improvement

Example of Field Coaching Grid already filled out.



Coaching Sales Skill Improvement



The Field Coaching Grid

Using the Tactical Coaching Plan

The Knowledge/Skill and Coachability Profiles are designed to work in concert to help you determine where you can get the best return for your coaching time and efforts. To utilize the data that they provide, a Field Coaching Grid is required to plot the combined scores.

The Field Coaching Grid

The Field Coaching Grid provides guidelines that help you allocate your coaching time according to the best return on your investment of effort.

The scores on the grid determine the level of **product/application knowledge and sales skills** your Sales Reps have, as well as their **coachability**. They also indicate a coaching priority for each Sales Rep.

Skill-Knowledge Level

As a rule of thumb, **Sales Reps who score in the middle level for skill-knowledge are the best candidates for your coaching efforts.** These people are neither the most nor the least knowledgeable or skilled.

They provide the greatest potential payoff, because, by definition, they have average knowledge and skill. By virtue of this fact, they have the greatest potential for improvement. Good coaching might change these Sales Reps from average to very good performers.

A Sales Rep with a high skill-knowledge score may provide you with a good return on your investment of coaching time — depending on his or her coachability.

A Sales Rep with a low skill-knowledge score would probably not provide a good return on your investment of coaching time. A lot of time can be wasted trying to turn the least knowledgeable or skilled Sales Reps into top producers. Usually working to “save” them in the field doesn’t vastly improve their situation. Retraining, counseling or discipline may be better solutions for the weak producer or the one with a low level of skills and knowledge.

Remember, the key here is to coach sales skills for improvement. The effort here is not to provide "personnel counseling" nor to implement a Human Resource-defined "probationary process."

Coachability Level

The second dimension you need to analyze in determining whether to spend time coaching a Sales Rep is coachability. How easy is it to work with the Sales Reps? Are they receptive to your ideas? Do they want to improve? Are they enthusiastic about their work? All these elements are part of the factor we call coachability.

Sales Reps who are highly coachable — those who are receptive to your ideas and have the basic ability to do the job — are most likely to provide you with a positive return on your investment of coaching time.

Sales Reps who are not receptive to your ideas or your help, or who are least able to learn, generally provide a relatively low return on your investment of coaching time. If this is the case with any of your Sales Reps, explore whether counseling is needed. Ask yourself, “Why is this person not receptive to learning, and what can I do to increase his/her receptivity?” It might also be appropriate to examine your own interpersonal style to see if that is causing the Sales Rep to reject your coaching efforts.

Putting it All Together on the Field Coaching Grid

The Field Coaching Grid contains squares for each of nine categories of Sales Reps. In each of these squares is a letter that indicates the coaching priority for the person you've analyzed for skill-knowledge level and coachability.

Sales Reps whose scores are plotted in squares marked "A" should receive the most coaching, more than Sales Reps whose scores are plotted in squares "B" or "C." Those plotted in squares marked "B" should receive more coaching time than the ones in squares marked "C."

Sales Reps who are plotted in squares of the same letter (A, B, C) should receive roughly the same amount of focused coaching attention per month or quarter based on your priorities.

The A squares represent your top coaching priority. The Sales Reps in these squares:

- Have a medium knowledge-skill level.
- Have a medium to high coachability level.
- Have room to improve and are generally receptive to coaching efforts.

The B squares represent the next best potential payoff. Sales Reps in the B squares:

- Have medium to high coachability.
- Have a high knowledge-skill level.
- Have some room to improve and are coachable. Coaching the few areas in which they have development needs will probably pay off in most cases.
- Many B Sales Reps will be able to learn and achieve at even higher levels than they have in the past.

Sales Reps labeled C:

- Most are either too **low in knowledge and skill areas** for coaching to make any significant difference. Rescue efforts requiring extraordinary time and effort seldom work. There may be better remedies for low performance at this level, such as retraining, discipline, counseling and so on, as discussed earlier.
- Other C Sales Reps fall into the **low coachability squares**, or zones, and are not responsive to advice, direction or change. Consequently, a heavy dose of coaching will not provide an adequate return.

This is not to imply that Cs should be ignored or allowed to “make it on their own.” On the contrary, every Sales Rep needs periodic tactical coaching. The point is that the As will benefit more, the Bs will benefit some, and the Cs will gain little. You should allocate your time accordingly.

Another important point relates to **new Sales Reps. Inexperienced Sales Reps require heavy attention in the early stages and should not be plotted on the grid until an experience pattern has been established.** Initially, they should be treated as “A” Sales Reps and given a significant amount of time and support. When they are beyond the “rookie” stage, you can assess their Knowledge/Skill and Coachability Profiles and plot them with your other Sales Reps.

*** Recognizing that Sales Reps change over time, it’s critical to reassess your staff twice a year.** For example, a “C” Sales Rep, who rated low on knowledge and skills initially, and medium on coachability, might continue to develop on knowledge and skills. If so, a reassessment six months later may indicate that he/she is now a B and deserves more of your time.

Coaching Process

**to Accelerate Behavior Change
with Sales Personnel**

The Tactical Coaching Model

The tactical coaching model is a process that allows you to plan and implement tactical coaching with your Sales Reps. Here is an overview of the five steps:

- A. **Plan the Coaching Visit.** Before the day you plan to spend in the field, it's important to discuss with the Sales Rep what you both hope to accomplish and how you'll go about accomplishing it.
- B. **Conduct the Pre-Call Briefing** to make sure that both you and the Sales Rep understand your roles, objectives and game plan for each specific call. You should review this information before every call you plan to make with the Sales Rep.
- C. **Observe the Call**, focusing on the skills you want to improve or reinforce and on the interaction between the Sales Rep and the customer. Be sure to minimize your role in the call and to keep the customer's attention focused on the Sales Rep. If appropriate, be prepared to execute a careful rescue that keeps the Sales Rep on track to getting the sale, while maintaining his/her credibility with the customer.
- D. **Conduct the 8-Step Coaching Conference** after the call, analyzing the Sales Rep's performance with the objective of reinforcing strengths and adjusting development needs. (See next page.)
- E. **Provide Follow-Up** reinforcement for the Sales Rep to take when you're not there. Tactical coaching is an ongoing process that continues even when you are not present.

The 8-Step Coaching Conference

- 1. Reinforce Positive Behavior**
- 2. Ask Them to Analyze Their Performance**
- 3. Use Leading Questions**
- 4. Suggest a Better Way**
- 5. Elicit Feedback**
- 6. Have the Rep Practice**
- 7. Get a Commitment to Continue Improvement**
- 8. Provide Positive Reinforcement**

The 8-Step Coaching Conference

An 8-Step Coaching Conference should be conducted at the end of most field coaching calls. **Although you should never miss a chance to reinforce good behaviors, the conference may be omitted if the Sales Rep does a particularly good job,** or if you want to avoid the repetition of using the same process after each of several sales calls. When the conference is omitted, however, a few brief comments should be made so that the Sales Rep knows what he or she did well to reinforce good behavior.

Conducting a coaching conference after the call is essential, rather than waiting until the end of the day, because:

- The Sales Rep will remember more of what he or she did immediately after a call than at the end of the day;
- Feedback is most effective when it closely follows behavior;
- The Sales Rep can apply what was learned from the last call on the next call; and
- **You get to coach the Sales Rep as he or she attempts to apply new methods and techniques on successive calls.**

The tactical coaching conference process is presented below in the order in which it is frequently used. The process, however, does not always need to be used in this order. In some situations the person being coached says something that makes the order impractical. And, using the process in the same order after every coaching call would make the process too predictable and mechanical.

1. Reinforce Positive Behavior

Indicate which behaviors were performed well so that the Sales Rep will know which ones to repeat on future calls. A positive beginning often sets the tone for the remainder of the conference. Positive reinforcement should meet the following guidelines:

- **Be specific** so that the Sales Rep knows for sure which behaviors to repeat and which to eliminate.
- **Use appropriate coaching reinforcers** such as comments that specifically point out the benefit of continuing the behavior.
- **Use reinforcement promptly after the behavior is exhibited** such as immediately after the call, to make sure that other behaviors are not inadvertently reinforced.
- **Maintain proper frequency of reinforcement.** For example, reinforce each occurrence of a new behavior that's being learned, but recognize that behaviors that are fairly well established and just need to be slightly improved do not always need to be reinforced each time they're exhibited.

2. Ask the Sales Rep to Analyze His or Her Performance Before You Comment in Detail

One of the major goals of coaching is to help people learn how to evaluate and improve their own performance. Asking the Sales Rep to analyze his or her own performance has the following benefits:

- It reinforces the fact that the Sales Rep should be analyzing each call, especially when you're not there;
- You learn how much the Sales Rep knows about sales technique, product knowledge, applications, and so on;
- **The Sales Rep might point out performance areas that you missed;**
- Quite often, the Sales Rep will be tougher on himself or herself than you would be; and
- An individual is likely to be more committed to taking action to solve problems that he or she uncovers.

3. Use Leading Questions

There may be times when there's a conflict between your analysis and the Sales Rep's analysis. He or she may think part of the call went perfectly; you may see needs for improvement. On the other hand, he/she may not be able to cite positive aspects readily; you may have one or more strong points in mind. In cases like this, you can get the person to "discover" a development need or strength by using leading questions, such as:

- *"Do you remember what the owner said when you...?"*
- *"Do you remember how the owner reacted when you paused to listen before answering his question?"*
- *"Were you comfortable with the way you presented our benefits?"*
- *"How could it have been done better?"*

4. Suggest A Better Way

If a Sales Rep is unable or unwilling to recognize performance deficiencies — because of lack of experience or lack of cooperation — suggest a better way to use the skill or knowledge being coached. Similarly, when the Sales Rep agrees with your critique, don't merely discuss a shortcoming; be prepared to provide better options for handling the skill.

5. Elicit Feedback

After discussing what needs to be done to improve or maintain performance, elicit feedback to make sure the Sales Rep knows what you expect him or her to do. Don't try to elicit feedback by asking the person if he or she understands. **Instead, ask the person to explain or describe his or her understanding.** The description should indicate whether the person really understands what you expect. Or ask questions whose answers will tell you if the Sales Rep understands.

6. Have The Person Practice Using The Skill or Knowledge

Practice can take the form of:

- Another call on which the new techniques are used;
- Informal role plays in which you pose questions and respond as the customer would; or
- **An application assignment that requires the person to study/learn specific information.**

7. Get Commitment

Rather than just telling the person to use the new skill or knowledge that's been acquired, try to get commitment to do what needs to be done. You generally can get commitment by:

- Asking the Sales Rep to help you, and himself (herself);
- Citing the success others have had with the solutions you and the Sales Rep have discussed;
- Getting agreement on when and where he/she will use the acquired skill(s); or
- **Selling him or her on using the new ideas.**

In summary, the Coaching Conference process should be used in relation to your specific coaching objective — the skill or skills, you want to focus on (establishing rapport, presenting features and benefits, etc.) However, it is often necessary to shift objectives based on what happens during the calls.

Let's say you planned to work on presenting features and benefits. On the first two calls, the Sales Rep is perfect in presenting features and benefits — there's nothing to improve upon. In this case, you'd need to communicate the excellence of the skill and then shift to another area that can use improvement. Similarly, a skill that you've targeted for coaching may not be required on a specific sales call. For example, if you're focusing on handling objections and the customer does not raise any objections, it provides you with the opportunity to either coach some other skill, or do no coaching on that particular call.

8. Positive Reinforcement

One of the critical elements in the Coaching Conference is using positive reinforcement to strengthen a skill the Sales Rep did well.

Positive reinforcement is based on the idea that **behavior that's followed by favorable consequences tends to be repeated. Behavior followed by negative (or undesirable) consequences tends not to be repeated.**

Another important principle is the fact that **ignoring an improvement will provide negative reinforcement and discourage the continued use of that positive skill or behavior.**

Whenever possible, this positive reinforcement should relate to a behavior that's part of the skill you're coaching. For example, if you're coaching the use of visuals on a call, try to reinforce a related skill, or sub-skill of visuals use, such as controlling the visual — assuming this aspect was done well.

Positive reinforcement should take place immediately, preferably early in the coaching conference. Why? For several important reasons:

- Early use increases the likelihood that the Sales Rep will repeat the behavior;
- It creates a positive atmosphere;
- It puts the Sales Rep at ease; and
- **It helps you focus on maintaining good performance — instead of becoming preoccupied with correcting or improving weak performance.**

Providing **positive reinforcement requires you to be specific**. This means breaking a skill or behavior down to the smallest element(s) or step(s) to make it more meaningful for the Sales Rep.

For example, if you were reinforcing the person's handling of objections, you'd be better off focusing on one step, such as "**acknowledging and restating the objection before responding.**" This is very specific, and thus more effective than simply saying, "You handled that objection nicely."

It's also important to **use appropriate coaching reinforcers**. A coaching reinforcer is a positive comment that specifically describes the behavior and points out a benefit of continuing to exhibit it. Here's an example: "**Keep on using that value-added benefit statement — it will help you close more sales.**"

Two other key points on positive reinforcement:

- Each person has his or her own needs and preferences, so **it's vital that you match the reinforcement to the person's needs and motivations**. If you know someone is driven primarily by recognition, you might find a way to feed that motivation. If another Sales Rep is competitive — concerned with how he compares to his peers — you might provide reinforcement which makes him feel that he can be a top producer if he continues to use the skill or behavior.
- **The more often you reinforce a behavior or skill, the better. Additional methods of reinforcement include:**
 - Mentioning the behavior or skill two to three times the day it's used;
 - Mentioning it again in a follow-up letter sent to the Sales Rep; and
 - Referring to it again on a subsequent field trip; and
 - Mentioning it **in public** when you are able to address other Sales Reps about the success of your "Coached" person.