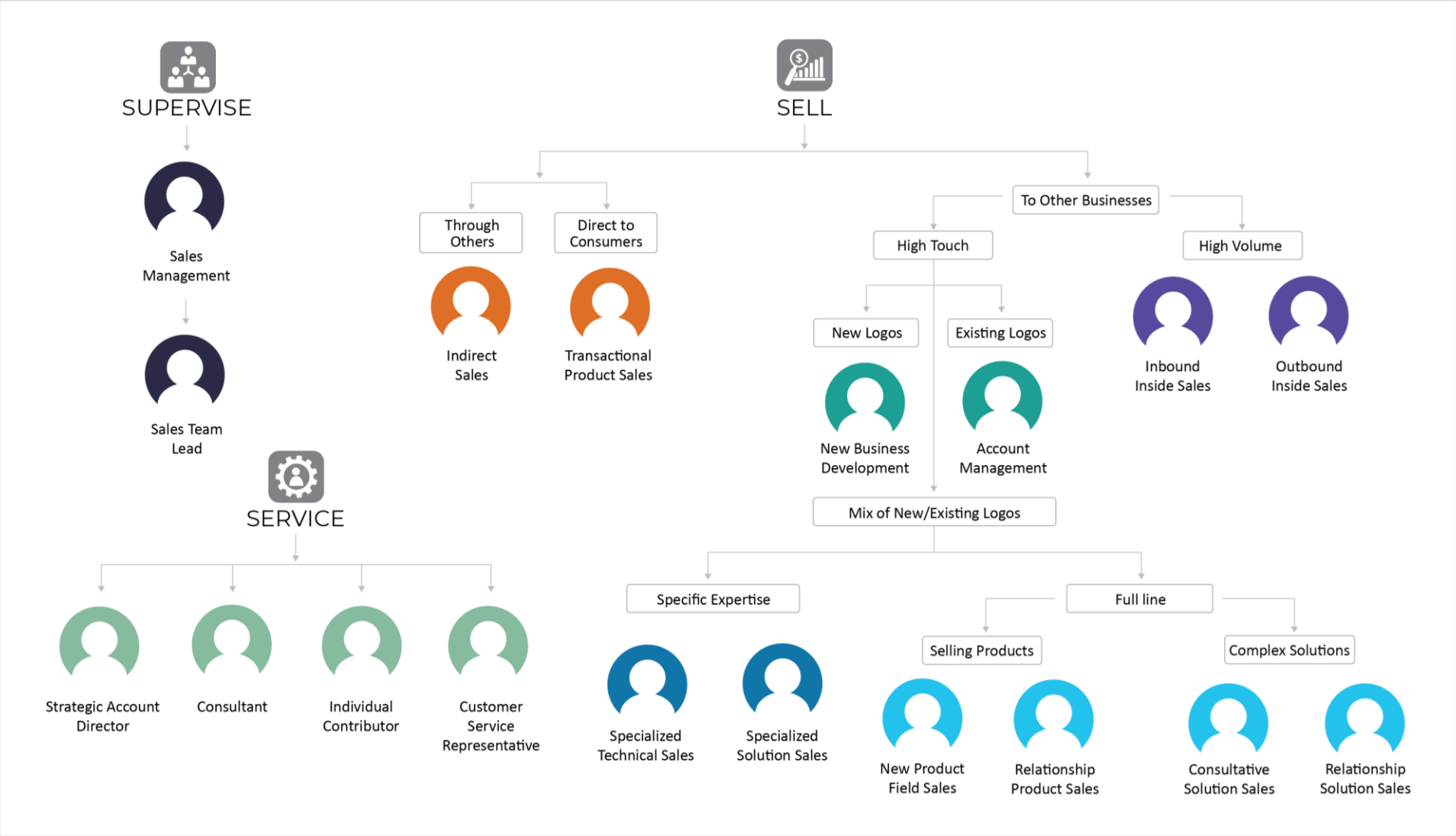


Benchmark Profiles

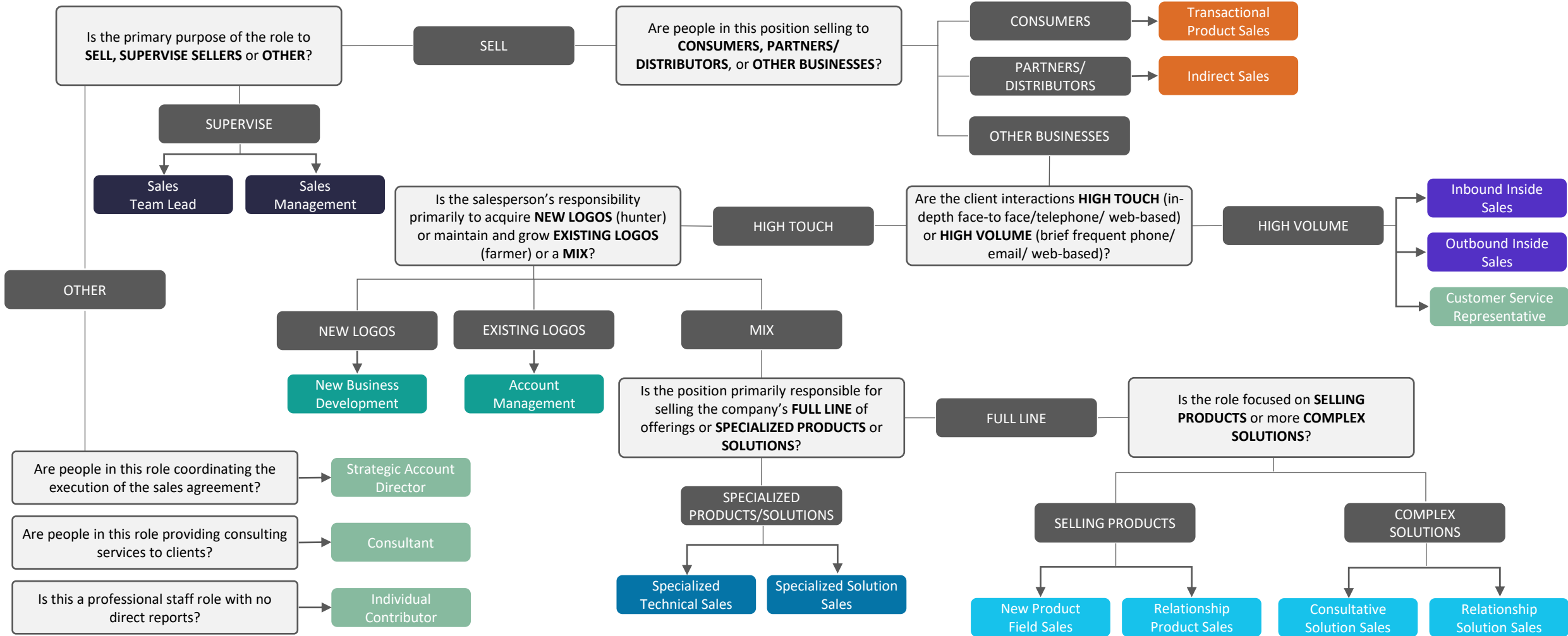
Client Reference Guide

Predictive Talent Assessment Benchmark Profiles Library



Predictive Talent Assessment Benchmark Profile Mapping

Before selecting the benchmark profile(s) for your role(s), take the time to sort your roles or positions based on these questions.





Chally Assessment Benchmark Profiles

Sales Profiles:

- [New Business Development](#)
- [Account Management](#)
- [Indirect Sales](#)
- [Inbound Inside Sales](#)
- [Outbound Inside Sales](#)
- [New Product Field Sales](#)
- [Consultative Solution Sales](#)
- [Relationship Solution Sales](#)
- [Relationship Product Sales](#)
- [Specialized Solution Sales](#)
- [Specialized Technical Sales](#)
- [Transactional Product Sales](#)

Sales Management Profiles:

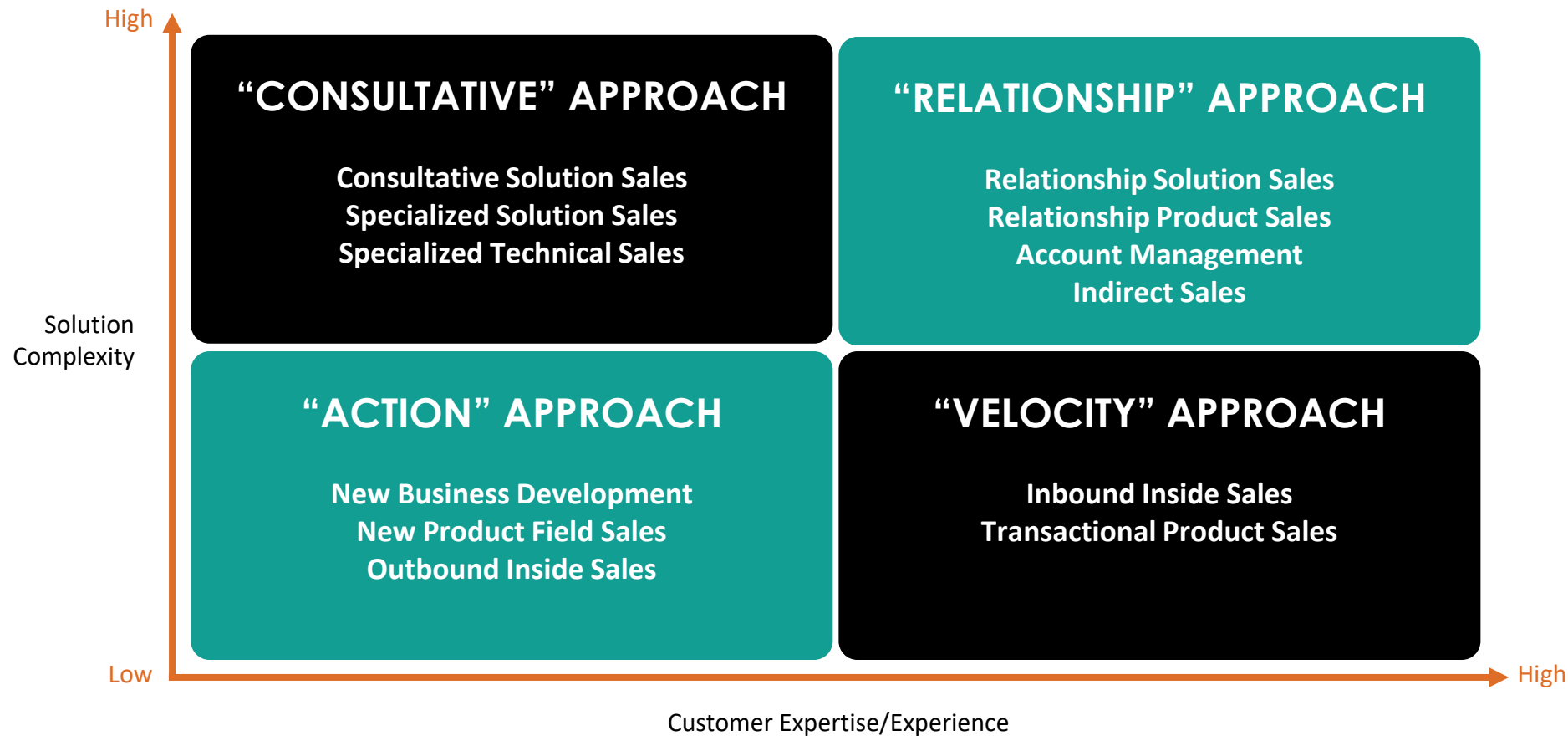
- [Sales Management](#)
- [Sales Team Lead](#)

Service (Post-Sale) Profiles:

- [Strategic Account Director](#)
- [Consultant](#)
- [Individual Contributor](#)
- [Customer Service Representative](#)

Sales Profiles

Sales Profiles Aligned with Buyer Needs & Approach



New Business Development

Those in new business development roles are responsible for bringing in new business from major accounts. This type of position is used to develop a presence in a competitive stronghold or to expand sales coverage beyond the firm's current customer base. Most often, these roles sell products or services that are relatively new or, at least, represent a new approach to the potential customer. Sellers in these roles are sometimes referred to as "rainmakers". Successful new business developers tend to be very opportunistic and look for novel ways to apply their products and services.

Salespeople in new business development roles focus almost exclusively on the prospect conversion process and typically have minimal post-sale contact. They will thrive in a situation where they can hand off their recently closed customer to a colleague who is responsible for delivery and account maintenance, so they are free to continue their quest for new customers.

Common Metrics

- # of new leads/opportunities
- Quota attainment
- Top line revenue
- Margins/profitability
- # of leads converted to customers

Sample of Common Position Titles

- Business Development Manager
- Sales Executive
- Account Executive
- Enterprise Sales

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New Business Development

PREDICTIVE COMPETENCIES	DEFINITIONS
Networks Effectively	Take the lead in social situations; effectively meet new people and build existing relationships
Analyzes and Resolves Customer Problems	Objectively isolate and define problems; remain engaged until problem is resolved
Uses Standard Discovery Questions to Qualify Prospects	Seek answers to standard questions that allow for an objective assessment of the potential for profitable business; rely on a consistent process for evaluating opportunities
Commits Extra Effort To Ensure Success	Invest extra time to achieve goals; set structured action plans and associate task completion with demonstrating value
Closes Through Incremental Steps	Break the sales cycle into increments and gain commitment to each component leading up to closing the sale
Seizes New Opportunities	Explore novel ideas and seize new opportunities; capitalize on the unexpected and forge opportunity; comfortable with change

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Account Management

Those in account management roles are responsible for optimizing sales in an existing set of major accounts. This is usually accomplished by increasing the seller's share of current purchases as well as expanding sales both by line extension and penetrating additional buyers within the accounts. This type of sales is proactive in strengthening customer relations and focuses on continually growing revenue by meeting customer needs and making it easy to do business with the seller.

Top account managers tend to be disciplined in their account planning process and set a contact schedule that reinforces their commitment to increasing customer satisfaction. They develop a network of internal support to facilitate special requests and quick problem resolution. When forced to increase the account base, they will prefer to use a referral process almost exclusively to identify possible prospects.

Common Metrics

- Quota attainment
- Revenue from existing accounts
- Customer retention (or % churn)
- Customer satisfaction
- Net Promoter Score (NPS)

Sample of Common Position Titles

- Account Manager
- Sales Account Manager
- Key Account Executive
- Regional Account Manager
- Client Principal

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Account Management

PREDICTIVE COMPETENCIES	DEFINITIONS
Drives Toward Success by Systematically Managing Accounts	Maintain personal control over those aspects of the sales and delivery process identified as top priorities
Increases Sales to Existing Accounts as a Means of Sales Excellence	Concentrate on generating increased sales from established accounts through new or complementary product applications
Fosters Collaboration to Achieve Shared Goals	Work collaboratively in a group setting to achieve shared results
Engages Others in Learning to Maximize Benefit from Purchase	Help customer gain maximum benefit from the product or service by committing to continuous education that provides information updates or product training
Solicits and Acts on Customer Feedback	Seek customer feedback regularly to verify satisfaction and uncover hidden issues/problems
Ensures Coverage and Responds to Customers	Remain available or implement a backup system when unavailable to ensure others' needs are managed at any time

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Indirect Sales

Those in indirect sales roles are responsible for supporting a network of distributors, agents, value added resellers, or manufacturer's representatives. Those in these positions have little direct authority over these sales forces except in rare cases where they are under contract to sell only your products or services. As a result, it is the responsibility of those in indirect sales roles to train and motivate distribution partners, often through joint calls, promotions, or special bonuses.

Common Metrics

- Performance of the channel/network
 - Quota attainment
 - Top line revenue
- Margins/profitability
- Partner/distributor/reseller satisfaction
- Partner/distributor/reseller retention

Sample of Common Position Titles

- Channel Program Manager
- Channel Manager
- Channel Sales Specialist
- Territory Manager
- Distributor District Manager

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Indirect Sales

PREDICTIVE COMPETENCIES	DEFINITIONS
Ensures Coverage and Responds to Customers	Remain available or implement a backup system when unavailable to ensure others' needs are managed at any time
Expands Business Through Cross Selling	Make a proactive effort to build volume within established accounts by expanding the breadth of products purchased
Prepares and Delivers Effective Presentations	Take time to prepare a presentation, make content relevant to audience
Closes Through Personal Identification with the Product	Use strong personal identification with the product or service to influence others and sell the product line
Engages Others in Learning and Assesses Understanding	Train others by providing factual information or data through prepared and formal programs designed to follow a structured outline; regularly assess individual and group progress
Coaches Others and Provides Timely Feedback	Share techniques with others through personal coaching and role modeling; create opportunities for observation and feedback
Leverages Expertise to be Recognized as Subject Matter Expert	Leverage industry expertise to share product application with customers; become the resident expert on topic at hand

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Inbound Inside Sales

Those in inbound inside sales roles are responsible for responding to contact initiated by customers or prospects over the phone or via electronic communication. Sellers in these roles typically gain an understanding of the caller's needs or requirements and quickly identify the appropriate actions to move the opportunity towards a sale, meeting, or other relevant outcome. These types of roles may also focus on maximizing sales of products to existing clients by trying to cross-sell or up-sell.

Common Metrics

- Revenue
- Call time
- Customer satisfaction ratings

Sample of Common Position Titles

- Inside Sales Specialist
- Sales Development Rep
- Business Development Representative
- Call Center Representative
- Inside Sales Account Manager
- Account Specialist

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Inbound Inside Sales

PREDICTIVE COMPETENCIES	DEFINITIONS
Tailors Style to Fit Customer Expectations	Tailor image to fit customer expectations; adapt to different situations with sincerity and realism
Analyzes and Resolves Customer Problems	Objectively isolate and define problems; remain engaged until problem is resolved
Identifies and Addresses Customer Needs	Seek to provide an appropriate solution by understanding what the customer is trying to accomplish; demonstrate thorough needs analysis
Achieves Results by Prioritizing Customer Satisfaction	Prioritize customer satisfaction as a primary objective
Makes Profitable and Pragmatic Recommendations	Leverage products or services to make recommendations that are cost-effective and beneficial for clients' operations

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Outbound Inside Sales

Those in outbound inside sales roles are responsible for initiating contact with prospects and customers to sell assigned product/service categories. Interactions typically occur via phone, email, and other electronic media. Sellers in these roles identify new business prospects and move those prospects along a defined sales process to an appropriate conclusion.

In some organizations, there may be levels of specialization where inside sales deals with small customers that cannot be profitably serviced by the field sales force. Others may use these types of roles to cold-call to get appointments for outside salespeople. Still others may address their entire sales effort through the outbound inside sales force.

Common Metrics

- # of new leads/opportunities
- Revenue
- Quota attainment
- # of outbound calls made
- Meetings booked
- # of demos/week

Sample of Common Position Titles

- Inside Sales
- Call Center Representative
- Contact Center Sales
- Business Development Representative
- Sales Development Representative

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Outbound Inside Sales

PREDICTIVE COMPETENCIES	DEFINITIONS
Makes Persuasive Presentations	Excite the customer with an enthusiastic presentation style; demonstrate value to promote products
Builds Business by Proactive Customer Contact	Proactive in using a customer contact process to identify and follow through on opportunities for additional business
Maintains Active Pace	Work rapidly and efficiently in bursts of energy; don't slow pace until resources are exhausted
Highlights Standard Benefits when Addressing Buyer Concerns	Actively uncovers matters most important to the customer and proactively position how solution will alleviate concerns
Updates Working Knowledge of Offerings to Provide Recommendations	Update product and application knowledge to ensure continued placement of products within customer's business
Commits Extra Effort to Ensure Success	Invest extra time to achieve goals; set structured action plans and associate task completion with demonstrating value

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New Product Field Sales

Those in new product field sales roles are responsible for maximizing sales within a territory by finding new customers and servicing existing customers. Sales often focus on introducing new or innovative products with applications that help customers accomplish business goals with increased efficiency. New business development is usually a large component of quota because the salesperson has support from others within the seller's organization to provide ongoing service post-sale. The mix of revenue from new business to existing business can be as much as 70/30.

These sales are typically to buyers with little previous experience with the product offering so they need a sound business case for making a change. The complexity of the sales process comes from the variety of needs and benefits required from the various buying influences within the customer organization. The sales cycle can therefore be long (usually six months to one year). Once the product is installed, it is expected to require only minor modification and expansion in the near term. Thus, the seller is free to pursue new business while periodically monitoring the satisfaction level and changing needs of the existing base.

Common Metrics

- Revenue
- Quota attainment
- # of new leads/opportunities
- Account growth/repeat business
- Margins
- New logo acquisition

Sample of Common Position Titles

- Field Sales
- Outside Sales
- Territory Sales
- Territory Manager

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New Product Field Sales

PREDICTIVE COMPETENCIES	DEFINITIONS
Achieves Results by Tailoring Message to Resonate with Buyer Motivations	Maximize results by identifying a customer's need, then providing a novel approach or product offering that appeals to the buying motivations of that customer
Makes Persuasive Presentations	Excite the customer with an enthusiastic presentation style; demonstrate value to promote products
Qualifies Prospects for Fit	After determining if there is a profitable match of prospect requirements and an established product or system, efficiently move the prospect through the sales funnel, or disengage them
Addresses the Needs of Multiple Buyers	Systematically address conflicting needs of multiple buying influences within a complex customer
Tailors Style to Fit Customer Expectations	Tailors image to fit customer expectations; adapts to different situations with sincerity and realism

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Consultative Solution Sales

Those in consultative solution sales roles are responsible for maximizing sales within a territory or market segment by finding new customers and servicing existing customers; usually 70/30 ratio of new to existing business. This position sells the full array of its company's offerings by proactively uncovering needs and positioning solutions to address business problem the customer doesn't know how to resolve. The salesperson's chief responsibility is to do a thorough needs analysis and then help configure the appropriate offering from the array of options to produce the system with the most relevant value proposition to meet customer needs. The sales cycle can be as long as 6 months to 1 year or more and it is common for there to be multiple buyers involved. Often, system implementation is the responsibility of the seller.

Common Metrics

- Revenue
- Quota attainment
- # of new leads/opportunities
- Account growth/repeat business
- Margins
- New logo acquisition
- Customer satisfaction
- Customer retention

Sample of Common Position Titles

- Territory Sales
- Sales Executive
- Account Manager
- Business Development Manager
- Sales Consultant

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Consultative Solution Sales

PREDICTIVE COMPETENCIES	DEFINITIONS
Continuously Develops Sales Leads	Disciplined and pragmatic in developing a prospect list; rigorously follow consistent steps to fill the sales pipeline
Uses Standard Discovery Questions to Qualify Prospects	Seek answers to standard questions that allow for an objective assessment of the potential for profitable business; rely on a consistent process for evaluating opportunities
Makes Persuasive Presentations	Excite the customer with an enthusiastic presentation style; demonstrate value to promote products
Commits Extra Effort to Ensure Success	Invest extra time to achieve goals; set structured action plans and associate task completion with demonstrating value
Advocates for Customers to Drive Results	Achieve results by understanding the customer's business, empathizing with their challenges, and setting a plan to meet their needs
Adapts Sales Approach to Match Buyer Motivations	Adjust sales approach to fit different buyer motivations

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Relationship Solution Sales

Those in relationship solution sales roles are responsible for acquiring new customers as well as servicing existing ones. These positions sell the full array of its business unit's offerings to an assigned geographic territory or market. The emphasis is on maintaining and growing sales within existing accounts by identifying additional needs and other departments/ organizations within the customer organization which can benefit from the seller's solutions. New business development activities are low key and are meant to replace customer attrition. The ratio of new business to existing is likely to be 20/80.

People in these roles sell systems and components to buyers who are reasonably expert at using and deriving the maximum benefit from them. The salesperson's major role is to work as an advocate to make it easy to do business with his/her company and to actively work at strengthening the customer relationship. This is accomplished with regular contact to explore the various buying needs of multiple constituents within the customer organization.

Common Metrics

- Account growth/repeat business
- Quota attainment
- Margins
- Revenue
- Customer satisfaction
- Customer retention
- New logo acquisition

Sample of Common Position Titles

- Account Executive
- Sales Executive
- Territory Sales
- Territory Manager
- Account Manager

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Relationship Solution Sales

PREDICTIVE COMPETENCIES	DEFINITIONS
Tailors Style to Fit Customer Expectations	Tailor image to fit customer expectations; adapt to different situations with sincerity and realism
Solicits and Acts on Customer Feedback	Seek customer feedback regularly to verify satisfaction and uncover hidden issues/problems
Builds Business by Proactive Customer Contact	Proactive in using a customer contact process to identify and follow through on opportunities for additional business
Measures Personal Success by Achieving/Exceeding Quota	Achieve or exceed direct-sales targeted objectives; use sales as a means of measuring value
Seeks Professional Recognition	Leverage professional status, connections, and pedigrees to influence others; comfortable with publicizing success
Adapts Sales Approach to Match Buyer Motivations	Adjust sales approach to fit different buyer motivations

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Relationship Product Sales

Those in relationship product sales roles are responsible for acquiring new customers as well as servicing existing ones. Sellers in these roles cover a geographic territory and sell the full array of their business unit's product offerings. The emphasis is on maintaining and growing sales within existing accounts through increasing share of wallet and uncovering additional buyers in other areas of the organization. New business development activities are low key and meant to replace those customers lost due to natural attrition. The ratio of new business to existing is likely to be 20/80.

People in these roles sell products to buyers who are reasonably expert at using and deriving the maximum benefit from them. Any new customers are likely to be replacing or substituting for previously consumed products. The salesperson's major role is to work as an advocate to make it easy to do business with his/her organization, solve problems, and to actively work at strengthening the customer relationship. The salesperson accomplishes this with regular contact used to demonstrate interest, update their understanding of needs, uncover concerns, and seek referrals.

Common Metrics

- Account growth/repeat business
- Quota attainment
- Margins
- Revenue
- Customer satisfaction
- Customer retention
- New logo acquisition

Sample of Common Position Titles

- Outside Sales
- Account Executive
- Sales Executive
- Account Manager
- Territory Manager
- Territory Sales

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Relationship Product Sales

PREDICTIVE COMPETENCIES	DEFINITIONS
Overcomes Objections by Addressing Emotional Concerns	Respond to any hint of concern that may keep the customer from buying
Closes by Building Relationships	Patiently build a personal relationship that results in favorable business outcomes
Provides Service by Empathizing with Customer Concerns	Make service solutions a top priority; let customer satisfaction drive the solution
Effectively Communicates in an Informal Manner	Communicate information in an informal and conversational manner
Drives Towards Success by Systematically Managing Accounts	Maintain personal control over those aspects of the sales and delivery process identified as top priorities
Expands Relationships and Networks Within Accounts	Expand relationships to include other potential users in the organization by networking through satisfied contacts

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Specialized Solution Sales

Those in specialized solution sales roles are responsible for maximizing sales of systems or solutions that require a significant amount of customization and training to implement. People in these roles often support sales of a specific subset of the solutions offered to the market. They provide extensive technical or subject matter expertise to configure the system (solution) for maximum benefit to both the customer and the selling organization.

In many cases, an individual in this role is the resident expert and may work as a resource to the sales team to sell to prospects or existing customers with the appropriate set of business needs. In other cases, this may be a salesperson with direct account responsibility for customers and prospects with needs focused on the specific system being sold. In this case, sellers are not usually bound by territorial constraints and may focus on serving customers in specific industries or verticals.

Common Metrics

- Revenue
- Margins
- Perceived solution effectiveness
- Customer satisfaction & retention
- Risk assessment results

Sample of Common Position Titles

- Solution Architect
- Sales Consultant
- Pre-Sales Consultant
- Systems Engineer

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Specialized Solution Sales

PREDICTIVE COMPETENCIES	DEFINITIONS
Gains Commitment by Motivating Others	Understand how to motivate others in a team setting to help them achieve top results
Identifies and Addresses Customer Needs	Seek to provide an appropriate solution by understanding what the customer is trying to accomplish; demonstrate thorough needs analysis
Commits to Continued Professional Development	Invest extra time to develop current skills while building new skills in other areas
Maintains and Shares Market Trend Awareness	Update market knowledge to be of assistance to customers who may not have time or resources to research or monitor market trends
Makes Persuasive Presentations	Excite the customer with an enthusiastic presentation style; demonstrate value to promote products
Engages Others in Learning to Maximize Benefit from Purchase	Help customer gain maximum benefit from the product or service by committing to continuous education that provides information updates or product training

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Specialized Technical Sales

Those in specialized technical sales roles are responsible for selling a specialized set of products or services and are not typically bound by territorial constraints. The salesperson is a product expert and acts as a resource to the customer to help its personnel do their job more effectively by using the seller's offering.

This type of salesperson could easily, and sometimes does, fill in for the customer in emergency situations that cause a vacancy in the position. Additional aspects of the added value that the salesperson brings is by acting as a liaison with the seller's internal contacts and providing continuous updates associated with market and legislative changes that might impact the customers' needs.

Common Metrics

- Perceived solution effectiveness
- Customer satisfaction & retention
- Risk assessment results

Sample of Common Position Titles

- Sales Engineer
- Field Sales Engineer

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Specialized Technical Sales

PREDICTIVE COMPETENCIES	DEFINITIONS
Anticipates Obstacles that Could Impede Progress	Identify barriers and methodically remove them to ensure success
Identifies and Addresses Customer Needs	Seek to provide an appropriate solution by understanding what the customer is trying to accomplish; demonstrate thorough needs analysis
Builds Credibility by Sharing Knowledge	Are a singular source of valid, factual, and unbiased information; build credibility through sharing of knowledge
Maintains and Shares Market Trend Awareness	Update market knowledge to be of assistance to customers who may not have time or resources to research or monitor market trends
Effectively Communicates in an Informal Manner	Communicate information in an informal and conversational manner

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Transactional Product Sales

Those in transactional product sales roles are responsible for selling commodity products on a transactional basis where there may or may not be an opportunity for repeat business. The focus is on a short sales cycle – often characterized by a one-call-close. The salesperson works quickly to understand needs, determine readiness, and close the business without appearing to rush the prospect.

This type of sales is more common in B2C sales than B2B. When relevant to B2B sales, the product is perceived as an add-on or not essential to the overall effectiveness of the organization. The key to success is effective identification of buying triggers and describing the product's benefits in ways that fully satisfy them. Since timing and the emotional component of the purchase are so critical, those who are successful need to be able to handle a high volume of calls or in person interactions while remaining resilient and focused in the face of rejection.

Common Metrics

- Revenue
- Quota attainment
- Call time
- # of calls or interactions
- ADS – average dollar per sale

Sample of Common Position Titles

- Retail Salesperson
- Floor Sales

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Transactional Product Sales

PREDICTIVE COMPETENCIES	DEFINITIONS
Achieves Results by Tailoring Message to Resonate with Buyer Motivations	Maximize results by identifying a customer's need, then providing a novel approach or product offering that appeals to the buying motivations of that customer
Qualifies Prospects by Assessing Interest Level	Capitalize on the moment in a sales environment devoted to cutting edge products or services; recognize that there is limited opportunity to further research an indifferent or ambiguous response before interest wanes
Closes Through Emotional Appeal	Build prospect's enthusiasm to the point of fear of missing the unique benefits of failed action
Takes Initiative to Improve Personal Productivity and Achieve Career Goals	Take initiative to develop ideas for personal productivity improvement and career advancement
Demonstrates Perseverance	Stay on task despite setbacks; remain focused on both long-term results and short-term yields

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Sales Management Profiles

Sales Management

Those in sales management roles are responsible for building the quality and productivity of their salespeople. Sales management roles typically involve hiring, developing, coaching sellers and controlling the focus, direction and performance of the sales team.

Sales management activities may include training salespeople on products, applications, and the sales techniques required to sell products and services. Typically, the position is responsible for budget and pricing issues. People in these roles also spend time on traditional administrative tasks including sales projections, facilitating problem resolution for salespeople, etc.

Common Metrics

- Aggregate of team metrics
 - Quota attainment
 - Top line revenue
 - Margins/profitability
 - Customer satisfaction & retention
- Employee feedback (engagement, 360-ratings, etc.)
- Qualitative ratings from boss and peers

Sample of Common Position Titles

- Sales Manager
- Sales Supervisor
- Sales Director
- Sales Force Manager
- District Manager

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Sales Management

PREDICTIVE COMPETENCIES	DEFINITIONS
Engages Others in Learning and Assesses Understanding	Train others by providing factual information or data through prepared and formal programs designed to follow a structured outline; regularly assess individual and group progress
Coaches Others and Provides Timely Feedback	Share techniques with others through personal coaching and role modeling; create opportunities for observation and feedback
Directs and Manages in a Team Setting	Delegate and follow up to ensure span of control is functioning in line with business unit goals
Leads with a Profitable and Efficient Approach	Show a realistic grasp of financial aspects of the organizational evolution and how it impacts customers; seek effectiveness and efficiency at multiple levels
Champions Initiatives and Leads Change	Takes the lead on specific, targeted business issues requiring change even if others do not understand or approve
Prepares and Delivers Effective Presentations	Take time to prepare a presentation, make content relevant to audience
Focuses on Measurable Outputs	Focus on the quantity of tangible outputs produced within a given timeframe

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Sales Team Lead

People in this position “wear two hats” in that they have both supervisory and selling responsibilities. In terms of hierarchy or career progression, sales team lead positions are seen as falling in between a sales representative and sales manager. Some organizations might describe this as a “super-salesperson” role. People in these positions usually do not have responsibility for hiring and performance management, but rather act as first point of contact for seller questions and day-to-day support. Sales team leads tend to derive personal satisfaction from playing a mentor role and providing support to others, AND by achieving their own sales goals (i.e., quota attainment).

Common Metrics

- Personal Productivity
 - Quota attainment
 - Top line revenue
 - Margins/profitability
 - Customer satisfaction & retention
- Qualitative ratings from boss and peers

Sample of Common Position Titles

- Team Lead
- Sales Team Lead
- Peer Mentor

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Sales Team Lead

PREDICTIVE COMPETENCIES	DEFINITIONS
Continuously Develops Sales Leads	Disciplined and pragmatic in developing a prospect list; rigorously follow consistent steps to fill the sales pipeline
Uses Standard Discovery Questions to Qualify Prospects	Seek answers to standard questions that allow for an objective assessment of the potential for profitable business; rely on a consistent process for evaluating opportunities
Makes Persuasive Presentations	Excite the customer with an enthusiastic presentation style; demonstrate value to promote products
Commits Extra Effort to Ensure Success	Invest extra time to achieve goals; set structured action plans and associate task completion with demonstrating value
Advocates for Customers to Drive Results	Achieve results by understanding the customer's business, empathizing with their challenges, and setting a plan to meet their needs
Adapts Sales Approach to Match Buyer Motivations	Adjust sales approach to fit different buyer motivations
Proactively Mentors and Supports Others	Proactively assume the role of mentor; offer judgment-free advice and encouragement to others without being asked
Coaches Others and Provides Timely Feedback	Share techniques with others through personal coaching and role modeling; create opportunities for observation and feedback

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Service (Post-Sale) Profiles

Strategic Account Director

Those who are in these types of positions are responsible for large, multi-site accounts – usually once a deal has been closed at the corporate level. People in these roles coordinate the execution of the sales agreement through service delivery and sales representatives responsible for the various customer locations. The sales contracts can range from being sole-source with a requirement to buy, to being one of a group of approved suppliers. In situations where the agreement merely provides the opportunity to penetrate the account on a local or regional level as an approved supplier, this person may coordinate a more structured team effort to win the favor of individual purchasers within the client.

People in these roles are comfortable meeting with executives and discussing the business case that represents their competitive advantage. Post-sale implementation is also a key responsibility to ensure end-users in the various customer locations receive consistent benefits. Top strategic account directors use their indirect influence skills to oversee the communication process internally to ensure local support, and monitor usage and satisfaction levels. Usage reports and demonstration of the promised benefits are delivered at a pre-agreed upon interval throughout the life of the contract to the client's corporate team.

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Strategic Account Director

PREDICTIVE COMPETENCIES	DEFINITIONS
Champions Initiatives and Leads Change	Take the lead on specific, targeted business issues requiring change even if others do not understand or approve
Commits Extra Effort To Ensure Success	Invest extra time to achieve goals; set structured action plans and associate task completion with demonstrating value
Proactively Mentors and Supports Others	Proactively assume the role of mentor; offer judgment-free advice and encouragement to others without being asked
Demonstrates Learning Orientation	Leverage technical competence and technology; learn for the sake of learning
Engages Others in Learning to Maximize Benefit from Purchase	Help customer gain maximum benefit from the product or service by committing to continuous education that provides information updates or product training

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Consultant

Those who are in these types of positions are responsible for delivering billable consulting services to clients. The Consultant role profile is not a direct sales role; however a consultant often collaborates with sales teams to develop sales strategies oriented around improving business outcomes. Some firms might refer to this part of the consultant job as “solution architect” responsibilities. People in this job family need to understand the customer’s business, strategy, and key initiatives; demonstrate expert-level industry knowledge to clients; and use subject matter expertise to win customer trust and build confidence in their firm’s solutions.

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Consultant

PREDICTIVE COMPETENCIES	DEFINITIONS
Identifies and Addresses Customer Needs	Seek to provide an appropriate solution by understanding what the customer is trying to accomplish; demonstrate thorough needs analysis
Commits to Continued Professional Development	Invest extra time to develop current skills while building new skills in other areas
Maintains and Shares Market Trends Awareness	Update market knowledge to be of assistance to customers who may not have time or resources to research or monitor market trends
Makes Persuasive Presentations	Excite the customer with an enthusiastic presentation style; demonstrate value to promote products
Engages Others in Learning to Maximize Benefit from Purchase	Help customer gain maximum benefit from the product or service by committing to continuous education that provides information updates or product training
Develops Solid Relationships by Making Client Needs a Priority	Develop a thorough knowledge of customer base and makes their needs a priority
Adapts Sales Approach to Match Buyer Motivations	Adjust sales approach to fit different buyer motivations

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Individual Contributor

This is the profile of a classic professional staff member who does not manage others unless as an informal team leader. This role can occur at all levels of the organization including new hires and high-level experts. The level of experience and technical competence in one's field tends to dictate the amount of autonomy in goal setting and direct supervision required to ensure effective results. Many individual contributors prefer to stay within their discipline and increase the depth of their expertise to manage processes or projects rather than take on the responsibility of managing a group. They are typically more drawn to the freedom of a self-managed environment where they are given the autonomy to grow and earn by consistently producing results as expected.

Individual contributors excel to the degree that they go beyond doing what is expected to understand how their efforts fit into departmental outputs and overall corporate objectives. Due to this insight, they develop processes and tools to help them more efficiently and accurately produce the relevant results. They don't get caught up with distractions or low priority issues because they have an innate curiosity, enabling them to probe for relevant information required to set personal priorities that align with corporate objectives.

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Individual Contributor

PREDICTIVE COMPETENCIES	DEFINITIONS
Focuses on Measurable Outputs	Focus on the quantity of tangible outputs produced within a given timeframe
Champions Initiatives and Leads Change	Takes the lead on specific, targeted business issues requiring change even if others do not understand or approve
Demonstrates Learning Orientation	Leverage technical competence and technology; learn for the sake of learning
Prioritizes Tasks	Follow rational, pragmatic steps to help address task urgency when prioritization must be strategic and proactive; a decision of what to prioritize must be made
Analyzes and Resolves Customer Problems	Objectively isolate and define problems; remain engaged until problem is resolved
Motivated by Attention To Detail	Focus on task precision for its own sake; detail orientation as a constant standard for self and others

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Customer Service Representative

This role is usually responsible for fielding inquiries and complaints from existing customers. A strong focus on results and effective people skills are the key requirements to successfully get resolution to the customer's issue and restore satisfaction. Often, the representative is required to interface with internal resources to get the necessary information and implement resolution steps. The degree to which this can be a centralized function is dependent on the level of sophistication of the information systems available to the individual representatives.

Top customer service representatives can diffuse the frustration of callers by demonstrating concern and empathy for the problem without becoming defensive or detached. They treat each encounter as unique, even though the content of the issue may be repetitive for them. They tend to be able to relate well to people regardless of any cultural or experiential differences, and they try to make customer contacts enjoyable and rewarding. They pride themselves on providing solutions and not simply putting bandages on the problems. They take steps to ensure the root causes are identified and addressed so that future problems can be avoided.

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Customer Service Representative

PREDICTIVE COMPETENCIES	DEFINITIONS
Finds Common Ground to Work Well with Others	Demonstrate tolerance for others' opinions, values, beliefs and attitudes; don't push personal agendas
Uses Customer Contact to Build Business	Comfortable implementing a high-profile role in the customer contact process to capitalize on opportunities for additional business
Advocates for Customers to Drive Results	Achieve results by understanding the customer's business, empathizing with their challenges, and setting a plan to meet their needs
Keeps Contact with Customers Upbeat and Positive	Use enthusiasm and genuine concern to encourage customers to buy; provide an enjoyable buying experience

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