

Sales Person EFFECTIVENESS Assessment

Mastering The
Customer-Supplier
Relationship



Self Assessment & Improvement Guide

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SALES PERSON EFFECTIVENESS ASSESSMENT

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TRAINING & CONSULTING

Helping Organizations Reach Their Potential

ABOUT THE SALES PERSON EFFECTIVENESS ASSESSMENT

The Value of the Customer Relationship Today strong companies measure their salespeople by more than just their ability to close sales. Increasingly, the salespeople who are the most valued within an organization are those who have the skills to develop and maintain excellent relationships with their customers. As more and more companies understand the real value of a customer over time, these skills are becoming even more important.

What Factors Create a Satisfied Customer?

A high standard of behavior on the part of the salesperson in the customer/supplier relationship reflects what customers really want and expect. Through extensive satisfaction research the common predictors of customer satisfaction in any customer/supplier relationship have been identified. These factors are consistent in literally every industry, and all are present in some form with any product or service. They are called the 'Values Of Excellence' and are strongly correlated with customer loyalty, preference and high return and recommend rates.

The result is a series of satisfaction indicators that can be used to measure customer/salesperson relationship excellence.

That's what the Sales Person Effectiveness Assessment focuses on.

The Sales Person Effectiveness Assessment

No matter what product or service you represent in your career as salesperson, it has been proven that implementing best practice customer/supplier behaviors in the areas measured by the Sales Person Effectiveness Assessment will result in higher return and recommend rates and increased customer loyalty - *the keys to long term profitability for any business enterprise.*

Using a self-assessment approach, this behavioral transformation tool will help you identify your own areas of strength and weakness as they pertain to your relationships with customers. When used correctly, it is guaranteed to create and sustain sales personnel improvement at all levels of your sales team.

By applying the predictors of total satisfaction as the value base for salesperson effectiveness, you will reinforce the critical factors to maintain and improve your customer/salesperson relationships. Not all changes can be implemented by the salesperson alone. Some may require an organizational shift in policies or procedures.

The tool has three key components:

Section 1:

· Explanations of how to use the Self-Assessment and of the concepts and theories the tool will apply.

Section 2:

· A comprehensive assessment and scoring tool to quantify your individual strengths and opportunities for improvement.

Section 3:

· A personal improvement plan to increase your own sales effectiveness by increasing satisfaction in your customer/supplier relationships. · Guidelines for using the assessment as a management tool or facilitated group dynamic.

USING THE SALES PERSON EFFECTIVENESS ASSESSMENT

Follow these simple steps:

Step 1: Read the concepts and theories section.

Step 2: Take and score the Sales Person Effectiveness Assessment.

Step 3: Identify your areas of strength and weakness. List categories of strengths in the Celebrate the Positives worksheet provided. List categories of weakness or lower scores on the Improvement Opportunities worksheet.

Step 4: Perform your own analysis. Identify the areas where you need organizational support. Review any values conflicts you might be aware of. Develop plans for change to current situations and procedures that will improve your category weaknesses using the Sales Person Effectiveness Improvement Plan.

Step 5: Implement the changes in your own work life and customer relationships.

Step 6: Repeat steps 2-5 at 6-month intervals.

VALUES-BASED CONCEPTS AND THEORIES

Foundation of The Values of Excellence, these behavioral guidelines form the framework for healthy and positive relationships with your customers, the long-term relationships that will create customer preference and delight.

Quality

Value

Efficiency

Timeliness

Connection/Access

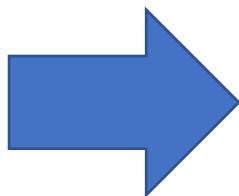
Self-Management

Environment

Teamwork

Commitment

Innovation



**CREATE AND SUSTAIN TOTAL
SATISFACTION
IN ALL CUSTOMER-SUPPLIER
RELATIONSHIPS**

For the purposes of this self-assessment, it is assumed that you already know “how to sell.” This instrument will show you how to create behavioral excellence so that continuously higher levels of overall customer satisfaction can occur--effectively creating a stronger customer return and recommend rate and yielding significantly more sales and profitability over time!

WHAT IS SALES PROFESSIONALISM?

The constant pressure to produce sales is a reality for every salesperson. The view and emphasis of the authors of the Sales Person Effectiveness Assessment is that professional salespeople have several things in common:

A long-term view of building and maintaining satisfying customer relationships.

The effective salesperson views himself as a skilled Person who plans to continue his career for many years. Effective salespeople are willing to make long-term commitments to building relationships with their customers.

A focus on win-win rather than win-lose.

These individuals make it their practice to leave customers feeling satisfied, so they are welcome to return and sell again. The effective salesperson knows that the extra effort and energy to create true customer satisfaction will pay off many times over in the future - either from the clients themselves or the additional clients their customers will refer.

An attitude of integrity and commitment to high standards of personal conduct.

The effective sales person sees himself as a Person with a high set of standards and ethics. Effective salespeople strive to be the kind of people customers want to deal with.

A commitment to continuous personal improvement.

Self-improvement is a welcome challenge for the effective salesperson. Individuals in sales may be competitive, but the most effective salesperson competes most aggressively with himself as he attempts to enhance his own capabilities.

The salesperson is the emissary of the organization.

The effective salesperson recognizes that he is the key front-line organizational representative, often the only company personnel a customer will meet. The effective salesperson knows that his organization's profitability and reputation depend upon how he conducts himself.

The effective salesperson partners with his organization to deliver customer satisfaction.

It is the organization's responsibility to produce quality products and services, and the Salesperson must sell these products and services in the way that best creates maximum customer satisfaction. Both must work together, not at cross purposes, for the ultimate success of the business enterprise. Salespeople must value the guidance and input of manufacturing, research and development, and other departments within their own organization. They have every right to expect that insight from their own front-line customer experiences can be shared within a receptive organizational environment.

The effective salesperson fundamentally understands the importance of a commitment to creating the highest levels of customer satisfaction possible.

The Values of Excellence will resonate with effective salespeople because of their genuine empathy and understanding with what customers really want.

THE SALES PERSON EFFECTIVENESS ASSESSMENT

Before taking the assessment, read once through each of the questions and the background descriptions provided. These descriptions will help you to understand each specific Value of Excellence to be measured. You can discuss the questions with your co-workers to gain clarification if needed before scoring your answers. As you take the assessment, recall your recent sales experiences and think about how your customers, peers or manager might rate you on each question.

Your Name _____ Company/Product Service Area _____

Read the questions for each Value of Excellence, and score yourself accordingly: Mark 1 (lowest or least extent) to 5 (highest or most extent) Please make sure to assign a number for each question score.

QUALITY

Question 1: Demonstrates product/service line expertise.

Customers want to deal with experts, who know what they are doing, know the product line and are qualified to deliver.

1 2 3 4 5

Question 2: Demonstrates company best practices.

As a company becomes more sophisticated, customers hear about the latest methods, technology, products and services available in the industry. They expect the supplier to consistently reflect the latest and best possible approach to fulfilling customer needs. This is especially true when the same level of product or service delivery has been delivered in the past or is available at another company branch.

1 2 3 4 5

Question 3: Maintains the positive reputation of the company.

Customers want to deal with the supplier with a good reputation. Building and maintaining the positive reputation of their company with customers is one of the core responsibilities of the salesperson as he is the direct interface with customers.

1 2 3 4 5

Question 4: Demonstrates knowledge of and familiarity with the industry and competing product lines.

Customers expect the salesperson to be able to answer questions about other product and service areas, be familiar with industry history and have general knowledge of competitive offerings.

1 2 3 4 5

Question 5: Fulfills customer transactions error free.

Customers tolerate few mistakes before looking elsewhere for another supplier. Product service ordering, delivery, and fulfillment must have no inaccuracies and be error free.

1 2 3 4 5

VALUE

Question 6: Represents the value of the product/service line to the customer.

Customers want to feel like they are buying the best product available for the best price. This fact cannot be overemphasized. Every effort should be made to position and present product/service features and benefits so that customers understand the real value they will receive, including how the product or service is specifically different or better than what the competition offers.

1 2 3 4 5

Question 7: Demonstrates the price of the product/service compared with competitors.

The customer wants to feel that a similar product is not available elsewhere at a lower price. Salespeople must be able to explain the price differential between their product and competitive products and justify a higher cost if this is the case.

1 2 3 4 5

EFFICIENCY

Question 8: Provides smooth and efficient fulfillment of customer needs/ requirements/orders.

Customers want the processes or systems which they must use to buy and to be serviced by the supplier's organization to have a logical and sequential flow without redundancy, rework, or waste. Order processing and fulfillment should be as easy and straightforward as possible, based on customer's convenience. Customers will not continue to utilize inefficient processes for order fulfillment.

1 2 3 4 5

TIMELINESS

Question 9: Responds to customer needs in the minimum time possible.

Customers want it now. Every effort should be made to respond to customer needs and inquiries as fast as possible.

1 2 3 4 5

Question 10: Delivers on time

On time delivery is the most important aspect of timeliness in the eyes of the customer.

1 2 3 4 5

Question 11: Takes all the time required to fulfill customer needs.

Customers want to feel that the salesperson has spent all the time necessary to explore every aspect of their satisfaction. They do not appreciate being rushed by the supplier/salesperson.

1 2 3 4 5

CONNECTION/ACCESS

Question 12: Is accessible to customers.

Customers want to be able to contact the salesperson and supplier organization at any time to get their needs met. Being available outside of normal business hours is expected by many customers.

1 2 3 4 5

Question 13: Uses current technology to stay in touch with customers.

From social media and email to video calling and drop box, today's sales professional has multiple ways to connect with customers to fulfill their needs.

1 2 3 4 5

Question 14: Facilitates the customer finding all information and resources offered.

Customers need to be able to easily navigate to and locate detailed information, see collateral material and resources the company has created to aid in sales. Effective salespeople insure their customers can find what they are looking for.

1 2 3 4 5

SELF MANAGEMENT

Question 15: Maintains a professional appearance.

The customer expects a professional appearance in terms of dress and personal care. Standards and best practices should be consistent with appearance in your industry.

1 2 3 4 5

Question 16: Has a consistently positive and enthusiastic attitude.

The customer wants the salesperson to be consistently positive and mood free. No personal agendas/problems or negativity should be brought to the relationship by the salesperson.

1 2 3 4 5

Question 17: Is courteous and friendly.

Friendliness and Courtesy correlate strongly with preference and are most noticeable when missing. The customer wants the salesperson to be approachable and easy to introduce to others within their own organization.

1 2 3 4 5

Question 18: Is attentive.

The customer wants the full attention of the salesperson without interruption from other salesperson activities or customers. The customer wants to feel that he is receiving more attention than any other customer.

1 2 3 4 5

ENVIRONMENT

Question 19: Makes customers feel welcome and appreciated.

Customers want to feel that the business they give the supplier organization is appreciated and that they are always made to feel their business is valued by salespeople and other representatives of the Supplier's organization.

1 2 3 4 5

Question 20: Makes customers feel comfortable.

Customers should feel physically and psychologically comfortable when dealing with the front-line sales and service personnel of the supplier and with any aspect of supplier's products or services at the supplier location.

1 2 3 4 5

Question 21: Is well organized.

Scheduling, neatness of the salesperson's desk, product presentation and demonstration etc. should all reflect good organization and well-planned forethought. A positive image of organization inspires customer confidence in the supplier's ability to perform well in other areas.

1 2 3 4 5

TEAMWORK

Question 22:

Communicates well with company team members to meet customer needs.

Salespeople must keep their organization up to speed about customer requirements in a timely fashion with appropriate rationale for their actions. Internal employees and supporting departments often misunderstand a salesperson's behavior and urgency without adequate communication from the salesperson.

1 2 3 4 5

Question 23: Collaborates well with other employees and departments in the company to meet customer needs.

The salesperson must often work with members of non-sales departments to meet customer needs and requirements. A commitment to teamwork will go a long way towards creating a unified appearance to customers as well as building expanded capabilities through synergy.

1 2 3 4 5

COMMITMENT TO THE CUSTOMER

Question 24: Demonstrates to the customer that they have the customer's best interests in mind.

The customer wants to feel that the salesperson understands and is looking out for his best interests and will not put his own self-interest before the customer's.

1 2 3 4 5

Question 25: Can be trusted and relied upon by the customer.

The customer wants to form a bond of trust with the salesperson. The customer wants to believe that the salesperson will do what he says he will. He will maintain this trust until it is violated by the salesperson. Once this trust is violated, it is hard to rebuild.

1 2 3 4 5

Question 26: Provides all information, terms and conditions up front.

Customers don't appreciate hidden terms and conditions or finding out later about things that should have been brought to their attention before the sale was made. Professional salespeople will not be afraid to disclose all details on the front end of the transaction.

1 2 3 4 5

Question 27: Constantly solicits customer needs.

Selling a customer once and then never checking back with him invites in competitors. Once a good relationship is formed, it should be maintained and improved for ongoing mutually beneficial outcomes. Neglected customers will get their needs met somewhere else.

1 2 3 4 5

Question 28: Informs the customer about anticipated or actual disappointment.

The enlightened salesperson knows that the impact of negative news will be less if it is shared as soon as possible. Although sometimes unpleasant, honesty with the customer is always the best strategy in the long run. Customers honesty, and there are tangible penalties in the free enterprise system for less-than-honest behavior by salespeople.

1 2 3 4 5

Question 29: Takes immediate responsibility and corrective action when outcomes are not achieved.

When mistakes do occur, customers want the supplier to do more than say they're sorry. Customers expect that their situation be "made right" and that the supplier provide adequate compensation to restore confidence, satisfaction, and delight in the relationship.

1 2 3 4 5

INNOVATION

Question 30: Constantly introduces changes and improvements to the product/service line.

The customer wants the supplier to be constantly introducing new, state-of-the art improvements to the product/service line. The customer wants to know that the supplier will continue to be the best or one of the best. Salespeople must constantly refresh the customer 's perception of their product/service line offerings and to their company's commitment to improvement.

TOTAL OF ALL SCORES_____

DIVIDE BY 30 FOR OVERALL MEAN SCORE_____

PLEASE KEEP IN MIND— THE SALES PERSON EFFECTIVENESS ASSESSMENT IS A MEASURE OF CURRENT CUSTOMER/SUPPLIER RELATIONSHIP BEHAVIORS. THE TOOL OFFERS THE OPPORTUNITY FOR A HEALTHY SELF ANAYSIS AND PROVIDES A MEANS OF ACHIEVING TOTAL SALESPERSON EXCELLENCE IN EVERY AREA.

INTERPRETING YOUR OVERALL MEAN SCORE

Delighted customers demonstrate their satisfaction with the salesperson and the organization the salesperson represents by returning to purchase again and recommending the product or service to others. The highest-rated sales/supplier organizations develop reputations synonymous with high quality, which in turn creates very loyal customers. The lowest-rated supplier organizations, who are represented by their sales force, not only have unsatisfied customers who will never return to do business again but may even become hostile and initiate other actions which could be damaging to the business enterprise itself.

Customer/supplier relationships are the dual responsibility of the supplier organization (as reflected by the quality of its products/services) and the salesperson who represents them.

The research, which encompasses thousands of customers satisfaction studies, reveals that customers require a high standard of behavior to create real satisfaction and loyalty as reflected below. See if your behaviors are adequate to create sustained customer satisfaction and loyalty.

If your overall mean score was 1.0 to 1.5 You are in an emergency situation. There is real damage being done to customer relationships. Not only are customers dissatisfied, but they are experiencing pain. Customers at this level could be hostile enough to consider punitive actions against your organization. Customers will be aggressively spreading bad word-of-mouth advertising about your organization and their negative experiences with it. With scores this low, the ongoing existence of the business enterprise is in question. A comprehensive change in approach should be initiated as soon as possible.

If your overall mean score was 1.6 to 2.0 You should be smelling smoke. Although customer satisfaction is also very low, customers are probably not as hostile as in the previous example. Customers express their dissatisfaction by not returning or ordering again. This salesperson is probably experiencing a sharp drop in sales or has never significantly produced. Even with the ability to close business, these behaviors will eventually short circuit every customer relationship in one way or another. With scores this low, no long-term relationship with customers can be expected.

If your overall mean score was 2.1 to 3.0 Below average. These scores represent the most minimal commitment to customer/supplier relationship management. Below average scores often represent significant problems or neglect in several areas. Typical problem areas might include difficult customer access, lack of timely response, a bad value proposition, self-management problems with the individual salesperson or a myriad of other core problems that are hard for the customer to overlook. An in-depth look at weakness areas should be undertaken and an aggressive improvement strategy implemented.

If your overall mean score was 3.1 to 3.95 Confident complacency. Without totally embracing the Values Of Excellence for customer/supplier relationships, the scores reflect the minimums necessary for relationship management. Some areas might be high, some low, or all numbers slightly above average. This confident complacency gives the impression that the salesperson is above average, but the research shows that 3.1 to 3.95 is more appropriately called the zone of customer indifference. If it is convenient for the customer, they will maintain the relationship, but not necessarily go out of their way to do business. Although the salesperson may be doing many things right, the collective effect on the customer supplier relationship can be described as ho-hum. This salesperson's relationship with the customer is in jeopardy from a more consistently effective salesperson. Like an old car, customer/salesperson relationships at this level will require more maintenance to "keep them on the road." No assumptions about customer buying behavior can be made with scores in the 3.1 to 3.95 range. The good news is that there is probably not much required to put the salesperson into positive territory. Building on strengths and

compensating for weaknesses will resonate strongly with customers as real positive changes take place in the relationship.

If your mean score was 3.95 to 4.5 This salesperson is doing well. Customers are being satisfied. Customers respond positively when contacted, put trust in the relationship, and consider this organization their preferred provider. Competitors will have to provide a significantly better value or other benefit to gain the customers business. Scores in the 3.95 to 4.5 range should not generate salesperson overconfidence, but rather a commitment to polish and improve to become truly world class. Customers in the 3.95 to 4.5 range will return and recommend from 20% of the time (4.0) to 65% of the time (4.5). These scores represent good salesperson relationship behavior.

If your mean score was 4.62 – 5.0 You are the benchmark. Customer Satisfaction Research shows that “World Class Status” in the eyes of the customer is achieved at 4.62. Once this threshold is achieved, return and recommend rates go up exponentially from 65% (every other customer recommends to others or buys again) to 97%-- customers in fact become unsolicited advocates for your company and its products with almost every customer returning to purchase again. When world class status is achieved, the supplier’s name becomes synonymous with quality. Scores this high also reflect the shared commitment of salesperson behavioral excellence and organizational commitment to customer satisfaction through product and service quality in every aspect. Salespeople with scores this high could mentor others.

CELEBRATING THE POSITIVES

List your highest scoring 5 questions overall:

Q#: ___ ? _____ Category: _____ Score: _____

Q#: ___ ? _____ Category: _____ Score: _____

Q#: ___ ? _____ Category: _____ Score: _____

Q#: ___ ? _____ Category: _____ Score: _____

Q#: ___ ? _____ Category: _____ Score: _____

a) What patterns do you notice in the areas you identified as your strengths?

b) What categories are the strongest (Teamwork, Innovation etc.)?

c) Can any of the strength areas be built upon for further improvement?

d) In what strength areas does your organization support you most in creating customer/supplier satisfaction?

e) Take a moment to acknowledge the strengths you have.

IMPROVEMENT OPPORTUNITIES

List the lowest scoring 5 questions overall:

Q#: ___ ? _____ Category: _____ Score: _____

Q#: ___ ? _____ Category: _____ Score: _____

Q#: ___ ? _____ Category: _____ Score: _____

Q#: ___ ? _____ Category: _____ Score: _____

Q#: ___ ? _____ Category: _____ Score: _____

ANALYSIS:

a.) Are there any patterns which emerge from the weaknesses you identified?

b.) What Category(s) (Quality, Teamwork, etc.) could benefit from the most improvement?

c.) What single question/value area is most in need of improvement? When the single weakest area can be targeted and overcome, the results can be significant since this area is theoretically pulling your score down the most.

Is this a surprise, or if this something you were aware of before?

IMPROVEMENT OPPORTUNITIES

What specific behaviors or oversights caused you to rate yourself lowest in this area?

What specific actions could you take to turn your low score on this question/area into a high score? What changes or support from your organization would help you change this low score to a high one?

What support from peers and colleagues can you obtain to help you overcome this weakness?

What are the areas in need of improvement which are mainly the responsibility of your organization and beyond your control?

What specifically would you have the organization change that would allow you to be more effective with your customers?

VALUES CONFLICTS

Values conflicts happen when your standard of ethics, or quality of practice as a professional salesperson is at risk of being compromised. These compromises are often the result of policies or practices of your organization, directions from managers or supervisors, or special requests made by customers.

Values conflicts ask the salesperson to accept a situation which they find uncomfortable, either because they are put in the middle, or in a situation beyond their direct control, or an area in which they must compromise their own quality standards. Values conflicts are often the cause of lowered morale, diminished commitment and reduced performance by the salesperson.

EXAMPLE: You made a commitment to a customer for the availability of a particular product but have concerns about your company being able to ship on time. WHAT VALUES OF EXCELLENCE ARE IN CONFLICT?

What values conflicts have you experienced in the past?

Are you experiencing any values conflicts now?

What actions can you take to reduce the incidence of values conflicts in your sales career?

How can your organization help you in avoiding values conflicts?

IMPROVEMENT PLAN SUMMARY

Guidelines: Be as specific as possible in your improvement planning for each area:

WHO you will talk to (customers, team members, or management) in your own organization.

WHICH new strategies or approaches you will implement.

WHY you will need the help/support of others and the organization to increase your effectiveness.

WHEN you will implement changes you have identified.

HOW you plan to implement improvements and how you will know when changes have taken hold.

STRENGTHS

- 1) What are the key strengths you have which can be leveraged further or built upon for greater effectiveness?
- 2) What specific actions will you take to use your strengths more or to build on these strengths?

IMPROVEMENT OPPORTUNITIES

- 1) What is your weakest area as indicated by the assessment?
- 2) What specific actions will you take to overcome or compensate for this area?
- 3) What support will you enlist from colleagues/peers to help accelerate your development in this area?
- 4) What cooperation or support will you seek from your organization to help you overcome these weaknesses?

ORGANIZATION STRENGTHS AND WEAKNESSES

- 1) What is your organization doing now to support your effectiveness that you would like to see them do even more of in the future?
- 2) What additional support will you ask of your organization to make you more effective with your customers?

VALUES CONFLICTS

1)What areas or categories are causing a values conflict for you as a Person salesperson?

2)What do you plan to do to improve this situation?

LIST SPECIFIC CHANGES, LARGE OR SMALL, THAT YOU CAN MAKE IN EACH AREA TO IMPROVE YOUR RELATIONSHIPS WITH CUSTOMERS.

QUALITY –

VALUE

EFFICIENCY

TIMELINESS

CONNECTION/ACCESS

SELF MANAGEMENT

ENVIRONMENT

TEAMWORK

COMMITMENT TO THE CUSTOMER

INNOVATION

REVIEW YOUR EFFECTIVENESS IMPROVEMENT PLAN OFTEN AND MONITOR YOUR OWN PROGRESS. IT WILL SERVE AS YOUR ROADMAP TO SUCCESS!

USING THIS TOOL FOR SALES GROUP/TEAM INTERVENTION

Many sales managers are concerned with issues that affect their sales team as a whole. Use of this instrument with the entire group can help quantify the strengths and weaknesses of the entire sales team when it comes to long term customer/salesperson relationship management issues. It can also enable you to focus on and prioritize areas for improvement by the whole team.

CONSIDER THESE APPROACHES

- 1: After the self-evaluation, conduct large or small group discussions. Focus on personal experiences with real customers, co-workers etc. that demonstrate an application of the quality values, or an experience where the values were not applied.
- 2: Depending on the climate of your group, you can use the assessment as a 360° tool. Have co-workers provide each other with blind assessments. Use these as a management tool to provide feedback to each salesperson.
- 3: Celebrate the positives by providing reward and recognition to those salespersons that most demonstrate values of excellence - based customer-supplier relationships. List most common areas of weaknesses. Brainstorm as a group, what new initiatives might best improve these areas.
- 4: Together management and salespeople can build common values-based goals, recording those goals in the improvement plan. Add value to the plan by assigning milestones and target dates for meeting each goal.
- 5: Meet periodically with each salesperson to discuss progress in plan implementation, ensuring that they are meeting their customer relationship improvement goals. Meet as a group and discuss how implementation of improvement plans is improving customer satisfaction. Again, draw upon each salesperson's individual experiences.

SPECIAL NOTE: Bart Berry Training & Consulting offers a web-based version of this instrument for large respondent groups of 50 or more. Salesperson instruments are entered into a collective database with a report in strengths and weaknesses of the entire sales team provided. Confidential individual reports are also generated for the team as well as each salesperson. Contact us directly for large scale salesforce assessments or performing these assessments online at our confidential customer website. <http://www.bartberry.com>.