

1. I always keep my promises, and respond promptly and willingly to customer requests.
2. At some point early in each sales call, I ensure that the customer understands the purpose of our meeting and the reasons for my questions.
3. My sales approach is characterized as one of being more interested in presenting information about my company's products or services than in fully understanding my customer's needs and concerns.
4. When presenting product or service solutions to a customer, I explain the downside as well as the positive side of each option.
5. When proposing solutions to customers, I don't relate the advantages of the product or service I'm recommending specifically to the customer's needs.
6. If a customer has an objection to buying one of my company's products or services, I first try to understand the objection from the customer's perspective, and then with customer input try to find a way to overcome it.
7. When scheduling follow-up sales calls, I don't request an agreement from the customer for a specific date and time.
8. If a customer discloses privileged or sensitive information to me during a sales call, I can be trusted to keep it confidential.

9. When asking a customer for an appointment, I position myself more as a persuader than a problem solver.
10. In addition to learning about a customer's current needs, I also want to know about his or her company's vision and plans for the future.
11. When discussing ways to meet a customer's needs, I don't present innovative options for the customer to consider.
12. When my customers are ready to make a purchasing decision, I recommend an alternative that closely matches their decision criteria.
13. If a customer expresses an objection to doing business with my company, I neither ask the customer to elaborate on it nor try to reframe it into an issue that together we can solve.
14. When closing sales calls, I request that customers commit to something that is in their best interest as well as mine.
15. When meeting with customers, I convey that I'm trying to make a sale, and not working toward developing a long-term relationship with them.
16. When asking customers for an appointment, I give them a good reason to want to talk with me.
17. When discussing needs and concerns with customers, I don't test for understanding to be sure I accurately heard what was said.

## SKILL ASSESSMENT

18. When discussing options to satisfy a customer's need, I position myself as a partner with the customer and not a persuader.
19. As my customers move toward making a purchasing decision, I help them think through the criteria and priorities they consider to be important.
20. If a customer is skeptical about something I've recommended, I first try to learn more about the skepticism, and then attempt to find a mutually agreeable way to overcome it.
21. When closing sales calls, I summarize what was accomplished in the meeting and ask the customer for some type of commitment.
22. During sales calls, I show enthusiasm for meeting with the customer as well as for my company and its products or services.
23. When scheduling appointments with customers, I don't explain what I hope to accomplish in our meeting.
24. In addition to learning about company needs and problems, I am also sensitive to my customer's personal situation and make an effort to understand his or her needs and concerns.
25. When discussing options to satisfy a customer's need, I ask the customer to present any alternatives he or she is considering in addition to presenting my own. ►



**Instructions**

- Read the first statement in the questionnaire. On the chart below, place an X in the circle that corresponds to your choice for how frequently you engage in the face-to-face selling skills behavior described by the statement along a continuum from *Completely True* to *Not At All True*. Place an X in only *one* circle per

statement. You must make a choice for all 42 statements in order for the inventory to be scored accurately. Press hard, as your responses are being recorded on the sheet below.

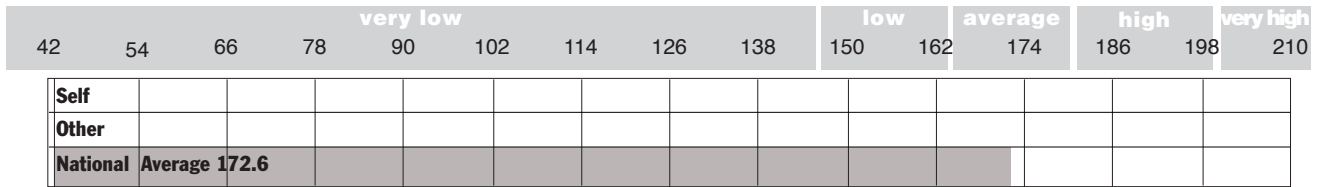
- Please do not read the interpretive material that follows until you have completed the inventory or have been instructed to continue.

- After you have made your choices for all 42 statements, separate this two-part form and follow the scoring instructions on the next page.

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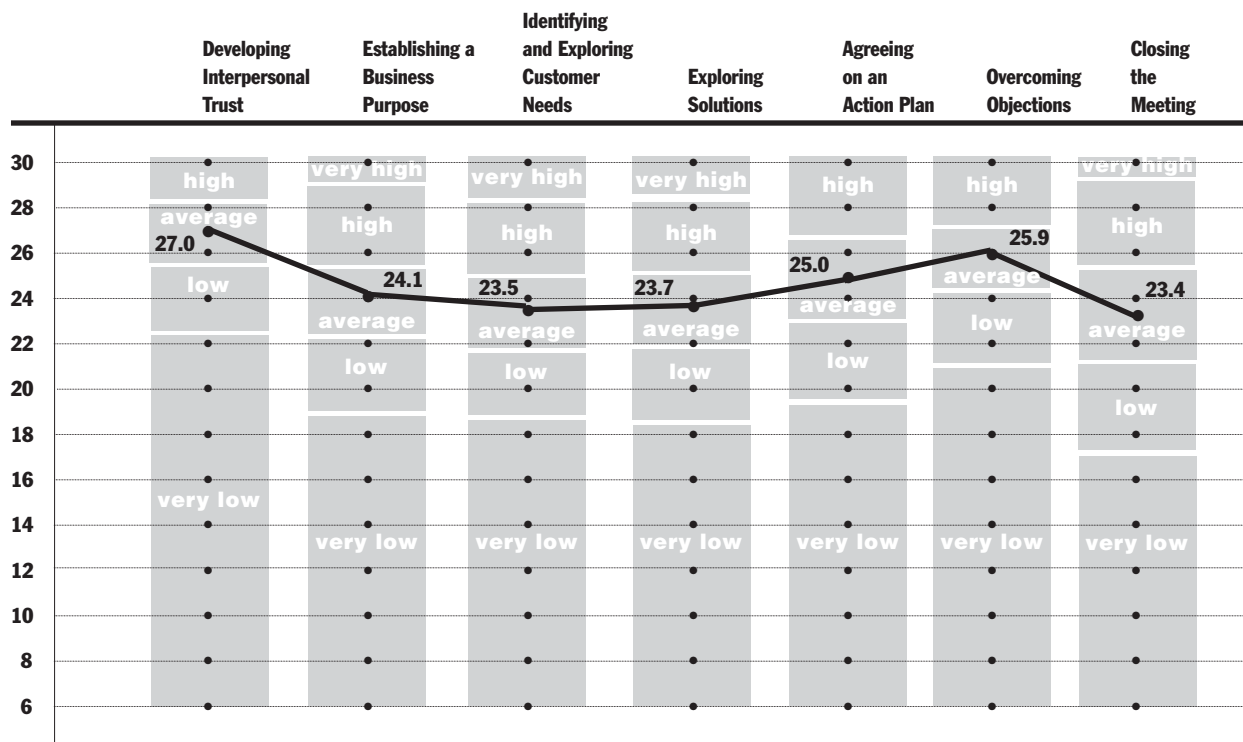
**Overall Effectiveness Profile**

Complete the bar chart below by shading in the bar from the left side to the point that equals your own (Self) overall effectiveness score. If you have received feedback from others, use a different ink color or pattern to shade in the second bar (Other) to indicate your overall effectiveness average from the Feedback Data Chart on page 11.



**Step Effectiveness Profile**

Using your step effectiveness scores from page 9, circle the appropriate point in each column below. Then draw a line to connect the circled points. This line is a profile of your collaborative selling skill effectiveness at this time. To plot your feedback scores, use a different ink color or pattern to plot and connect your averages from page 11.



### Diagnostic Questions

Refer back to Your Profiles on page 12 of this booklet. If you have Self or Other scores that fall into either the “average,” “low” or “very low” categories, the following questions will help you gain additional insight into your face-to-face selling behavior and identify areas for improvement.

### Developing Interpersonal Trust

1. Do you view the process of developing interpersonal trust with a customer as something you do primarily during the early moments of a sales call? (*While the early moments of a sales call are critical in forming first impressions, interpersonal trust takes time to develop and is a function of the entire sales process — how you schedule, conduct and follow up your sales calls.*)
2. Do you send mixed messages to customers about your desire to have a long-term partnership type relationship with them by failing to keep promises, respond promptly and willingly to customer requests, or keep privileged or sensitive information disclosed to you confidential? (*Actions such as these send the message that you can't be trusted. To gain a customer's trust, you not only need to talk about your desire for a long-term partnership type relationship, but also need to behave accordingly — “walk the talk.”*)

3. Do you fail to use every sales call as an opportunity to get to know a little better each of your customers as a person? (*While every sales call has its business purpose, every customer is also a person with interests outside of work, dreams, fears, etc. Taking time during each sales call to engage in a personal discussion is a proven way to develop interpersonal trust.*)

### Establishing a Business Purpose

1. Early in sales calls on new customers, do you spend a majority of the time talking about your company's capabilities and its products or services? (*When you do most of the talking at the outset of meetings with new customers, you are likely to be perceived as a persuader, not someone who has the customer's best interests at heart.*)
2. Do you frequently have difficulty getting customers to take an active part in your face-to-face meetings with them? (*Talking a lot about your company and its capabilities early in a sales call allows the customer to emotionally withdraw from the conversation, and makes it difficult to get his or her participation later.*)
3. When explaining why you and the customer should meet, do you primarily focus only on your reasons for wanting to meet? (*Focusing only on your reasons for wanting to meet with the customer, and not providing good reasons for the customer to want to meet with you, further increases the perception that you are more interested in making a sale than in helping the customer make a good buying decision.*)

## INTERPRETING YOUR SCORES

### Identifying and Exploring Customer Needs

1. When a new customer says something like “I'm happy with my current supplier,” do you frequently find yourself “stumped” and uncertain about what to do next? (*This might be true. But you can offer value by asking follow-up questions which help the customer take a look at the way he or she currently does business and determine if there is room for improvement.*)
2. When discussing needs with a customer, do you limit your discussion only to those specific areas that can be addressed by your company's products or services? (*To position yourself as a partner, you need to gain a thorough understanding of a customer's entire business, including future dreams, by asking questions about all aspects of the operation.*)
3. Do you feel as though you are prying when asking in-depth follow-up questions to gain a more complete understanding of a customer's needs and problems? (*The discomfort you're feeling may be your problem and not the customer's. If the customer is openly providing answers, continue to ask questions. However, if he or she is hesitant and appears reluctant to respond, back off and come back to the topic later.*)



**1. Developing Interpersonal Trust**

This step is at the core of the collaborative selling process. It is essential for achieving open discussion and face-to-face sales meetings in which both you and your customers participate as partners. To ensure that a high level of trust exists, you must regularly make “positive deposits” into the Emotional Bank Account (Covey, 1989) you have with each customer. Building and maintaining a reserve ensures a positive level of trust and results in open, honest two-way discussions during your sales calls. Overdrawing the account reduces the chances for open-discussion and ultimately puts the entire relationship in jeopardy.

Interpersonal trust should develop naturally throughout the meeting, not just during a few minutes at the beginning or end. In short, there is no single best time nor best way to develop interpersonal trust. Many sales reps routinely make small talk in the first few minutes of every sales call with the intention of developing trust and putting the customer at ease. In fact, they run the risk of achieving the opposite result. The danger here is that customers who perceive the small talk as phony or a set-up, or who are pressed for time, may wind up feeling not only less at ease but all the more guarded and defensive. You need to find ways to develop trust that are comfortable for you, as well as appropriate to the particular customer. However, the way in which you go about scheduling, conducting and following-up sales calls will add to or detract from the relationship of interpersonal trust that exists between you and the customer. Therefore, one of your goals for every sales call should

be to build further on the relationship of interpersonal trust you have with the customer. Others who advocate the importance of developing interpersonal trust as a key component of the sales process include: Alessandra & Wexler (1985), Callahan (1992) and Muller (1987). In addition, in a research study comparing the performance characteristics of high and moderate performing salespeople, DeMarco and Maginn (1982) found that many of the characteristics that distinguish high performers revolve around issues related to developing interpersonal trust.

**2. Establishing a Business Purpose**

This step is critical in establishing a business purpose for your sales call when the customer is uncertain of the reason. In addition, it can be used to transition a discussion from one topic to another during a sales call. Without establishing a valid business purpose, you will likely experience difficulty in getting the customer to join you in an open, two-way discussion of his or her situation. Most sales reps explain the purpose of a sales call in terms of why they want to meet with the customer, rather than how the customer will benefit from the meeting. If you use this approach, the customer is likely to view you simply as a persuader intent on convincing him or her to buy whatever you have to sell.

To give the customer a valid reason to meet with you and at the same time establish a direction for the meeting, it is advisable to begin by referring to a known customer need, concern or problem you would like to discuss further. Referring to a customer need captures the customer’s

attention by immediately indicating that the meeting is customer-centered. Example: “During our phone conversation to set today’s appointment, you mentioned that you had run into several customer service problems with one of your suppliers lately. Isn’t that right?”

Next, mention generally how either you or your company is experienced or might be of help in this area. This serves to create further customer interest by establishing you as a possible resource in this area. When explaining how you or your company might be a resource, be sure to avoid mentioning specific products or services. Talking about specific products or services at this stage suggests that you are there only to persuade, not to serve as a partner. Example: “I know customer service problems can be really frustrating when they happen because you expect your suppliers to handle your business smoothly. Something that may be of interest to you is that our company has built its reputation, at least in part, on providing excellent customer service, and with your permission I would like to find out more about the problems you’ve run into.”

Lastly, you should encourage the customer to talk by asking a broad general question related to the concern you identified earlier. This serves to get the customer talking so that you can gain a more complete understanding of the problem and moves the discussion to the next step of Identifying and Exploring Customer Needs. Example: “Great. What types of customer service problems have you had?” Also, when done correctly these three pieces of information are



**Establishing a Business Purpose**

1. Near the beginning of every sales call, take a few seconds to review what you would like to accomplish in the meeting and ask the customer if he or she would like to add or change anything.
2. Prior to every sales call, practice what you are going to say to the customer to explain the purpose of your meeting.
3. Before every sales call, think about how the customer is going to benefit from the meeting so that you can include this information when you explain the purpose of the meeting to the customer.

**Identifying and Exploring Customer Needs**

1. Before each meeting, list in writing the questions you would like to ask the customer to find out more about his or her concerns, needs and problems.
2. Practice using open-ended questions and supportive remarks in your everyday conversations as well as in sales calls.
3. Make a point to periodically use the skill of paraphrase to test for your understanding of what a customer has said. Don't assume you always know what the customer means.

**Exploring Solutions**

1. When discussing ways to meet a customer's needs, start the discussion by first asking what ideas the customer is considering before you present yours.

2. When presenting your ideas to meet a customer's need, make a point to explain the downside as well as the upside of each alternative you present.
3. Always try to identify more than one alternative to meet the need. This will ensure that there is a choice to be made, which provides a natural transition to the next step, *Recommending a Solution*.

**Agreeing on an Action Plan**

1. Remember to ask the customer about his or her decision-making criteria, not which alternative he or she likes best. Asking the customer to choose an alternative removes you from the sales decision-making process and makes it difficult to present your recommendation unless it's the same as the customer's solution.
2. Always recommend the alternative that is in the customer's best interest even though it may not be in your own best interest. Remember: your goal should be to develop a customer and not just make a sale, because long term the benefits are greater for both you and your company.
3. Put the name of each product or service you sell at the top of its own sheet of paper. Divide each sheet in half lengthwise and in the left-hand column list all the features of that product or service. In the right-hand column, describe the customer benefit(s) associated with each feature. Periodically review these sheets until you've mastered the customer benefits for each product or service.

**Overcoming Objections**

1. Make a list of the most common objections you hear from your customers. Practice overcoming these with your sales manager, another sales rep or a family member.
2. Avoid getting into point-counterpoint discussions with customers who express an objection to doing business with you and your company. Engaging in this type of discussion usually only serves to solidify the customer's position and makes it more difficult to overcome.
3. Before each sales call, remind yourself that customer objections are not always something insurmountable and that if the customer wants to do business with you, together you will find a way to overcome it.

**Closing the Meeting**

1. Make a list of things you might ask a customer to do at the close of a sales call that involves more than just committing to meeting with you again.
2. When setting follow-up appointments with customers, remind yourself to always request an agreement for a specific date and time.
3. When closing a sale or a sales call, make it a practice to summarize what was accomplished during the meeting before requesting what you would like the customer to do next.

