

Name: _____
Date: _____

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Survey

Welcome to MGMT 484 - This survey will not effect your grade. We are accessing your current level of confidence and comfort in the sales process.

Please assess your **current level of confidence and comfort** with each of the following skills by assigning yourself a score from 0 to 10, using whole numbers only:

- 0: You feel completely unfamiliar or uncomfortable with this skill.
- 5: You feel somewhat comfortable — similar to what might be expected from someone just starting out in sales.
- 10: You feel very confident and comfortable — comparable to an experienced professional sales person.

MEETING OPENING (Effectively gain attention and build rapport)

- _____ Professional introduction: (intro self – full name, correctly identify buyer by name, eye contact)
- _____ Establish/build rapport: (raise comfort of prospect; build trust)
- _____ Engage prospect: (problem to be solved, possible value/benefit)
- _____ Set the agenda (situation appropriate)
- _____ Gain commitment to continue: (appropriate transition to Needs ID)

NEEDS IDENTIFICATION (OBJECTIVE: Obtain a clear understanding of customer's situation in order to prepare a customized presentation)

- _____ Uncover decision process (decision criteria, people involved in decision process, potential timing issues)
- _____ Effectively ask targeted questions to uncover and confirm relevant facts about company and/or buyer
- _____ Effectively gain a basic understanding of the prospect's problems and/or challenges
- _____ Explore the implications of those problems/challenges (consequences, costs, missed opportunities, etc.)
- _____ Summarize the problems/issues uncovered, gain a pre-commitment to consider the product/service and smoothly transition to presentation

PRESENTATION

- _____ Present a brief overview of the company and a potential solution to build enough credibility to gain a second appointment to present the solution
- _____ Use appropriate/professional visual aids as necessary (testimonials, 3rd party evaluations, graphs, charts, data, etc.)

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OVERCOMING OBJECTIONS (OBJECTIVE: Eliminate concerns or questions to customer's satisfaction)

- _____ Initially gain better understanding of objection (clarify or allow buyer to clarify the objection)
- _____ Respond appropriately and helpful to the buyer
- _____ Confirm that the objection is no longer a concern of the buyer

GAIN COMMITMENT (OBJECTIVE: Take initiative to understand where you stand with buyer now and for the future)

- _____ Persuasive in presenting a reason to commit to another appointment
- _____ Ask for an appropriate commitment from the buyer, given the nature of this particular sales call

PROFESSIONAL COMMUNICATION

- _____ Effective verbal speaking skills (appropriate grammar and English, minimum "ums," "likes," "you knows," etc. and minimize abstract language without explanation: "great," "super," "awesome," etc.)
- _____ Effective listening skills (active listening; restate, rephrase, clarify, probe for better understanding, etc.)
- _____ Appropriate non-verbal communication (eye contact, posture, appropriate attire)
- _____ A flowing conversation rather than a scripted role-play

CREDIBLE AND TRUSTWORTHY

- _____ Clearly knowledgeable/credible about the product, the industry and business in general
- _____ Enthusiasm and confidence

Comments _____

