

Competency Assessment

Competency	Level 1 Skills	Level 2 Skills	Level 3 Skills	Assessed Level and evidence	Potential Training
Research / Information Gathering	Reads information given to them but does not go looking for information on a regular basis.	Sometimes researches a customer before visiting them; occasionally reads trade press to find out trends or news.	Understands the best sources of information, regularly accesses them to learn more about clients. Always researches client before they go to visit to find an opening.		Customer research
Prioritising Customers	Randomly approaches customers with no prioritisation.	Has some prioritisation but tends to chase "hot" leads whenever they appear without an initial assessment.	Maintains a register of customers with a consistent approach to prioritising using appropriate criteria		What does a good customer look like?
Relationship Building	Has few good relationships; struggles to develop a rapport with the clients that they do meet.	Has some good relationships where they are trusted; is able to build rapport with more junior members of the client team.	Uses known contacts to be introduced to new ones; engages with existing customers on a regular basis; is able to engage in a conversation with most people.		Building Trust

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Cold Calling	Seldom calls new clients; struggles to engage with people who they speak to.	Does some cold calling but does not have much success.	Comfortable contacting unknown people; develops an appropriate hook before calling; generally successful at getting what they want.		How to get through the front door
Questioning	Struggles with questions beyond their initial plan; leaves meetings with an incomplete knowledge of the problem	Generally finds out what they need to know but doesn't always find out everything they should know.	Plans questions before any meeting; starts with open opinionated questions at all times; focusses on one topic at a time to understand fully before moving to the next.		Validation
Active Listening	Can listen and note take at the same time but isn't actively engaged in the conversation.	Is engaging while the other person is talking to demonstrate that they are participating in the conversation; does not regularly summarise the conversation.	Encourages speaker through regular feedback; summarises a conversation at regular intervals		Active listening

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Lead Qualification	Chases all leads equally with no distinction between them; does not ask qualifying questions early in any engagement.	Can qualify individual leads but needs help to determine which are the best ones to chase.	Targets best opportunities at all times; has a prioritisation process for all opportunities; understands how to progress from one stage to the next of the sales process.		What does a good opportunity look like?
Product Knowledge	Low level of product knowledge; needs help to translate customer needs into specific features that can help them.	Medium level of product knowledge	High level of knowledge on all products; can articulate the benefits of each of them		In-house training
Presentations	Is nervous giving any presentation; needs help to build one or uses other people's presentation as their own.	Happy to present to small audiences; presentations tend to be formulaic with little changing between customers.	Comfortable standing in front of a large audience; presents confidently and with passion.		Presentation Skills
Persuasion	Uses few techniques to motivate a client to change; sticks to the one script.	Uses some techniques but not on a regular basis.	Employs a range of techniques to encourage clients to act as you would like.		Science of Persuasion

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Managing the relationship	Only ever meets with the same people in the customer; forgets to ask about the decision making process.	Understands the decision making process within the customer but does not always manage to meet all the right people.	Can identify and meet with a wide range of people within named clients; understands the main buyers for any given opportunity		Different buyers
Value propositions	Only ever lists features as a reason for the customer to buy; cannot translate features into benefits.	Mixes features and benefits in pitches to clients; sometimes makes these specific to the customer.	Regularly provides value statements to customers; can translate features into benefits for products and relate them to specific needs of the client.		Value selling
Objection handling	Reacts poorly when customer pushes back; struggles to deal with objections and needs to revert later.	Can answer most questions and comments from a client but not always in a considered way.	Receives and responds to objections thoughtfully; ensures that the customer is satisfied with the response.		Negotiating
Negotiating	Needs significant support and help from others when negotiating with customers.	Can manage alone but frequently gives away too much for too little.	Understand their objectives in any negotiations; can define a set of variables to be included; understands when to walk away.		Negotiating

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Closing and completing deals	Struggles to finalise a deal and often forgets to include crucial elements in the final process.	Involves relevant others as required but still takes time to close deals and sometimes forgets crucial elements.	Can define the actions required to close a deal; understands legal and financial implications of specific terms.		Closing