

THE SALESFORCE PROFICIENCY ANALYSIS  
(SPA): A NEEDS ANALYSIS STUDY TO  
DETERMINE THE PRODUCTIVITY  
GAP BETWEEN THE TOP AND  
BOTTOM PERFORMERS  
WITHIN A SALESFORCE

By

BERNICE C. ALLEGRETTI

Bachelor of Arts

Northeastern Illinois University

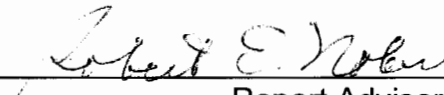
Chicago, Illinois

1982

Submitted to the Faculty of the  
Graduate College of the  
Oklahoma State University  
in partial fulfillment of  
the requirements for  
the Degree of  
MASTER OF SCIENCE  
December, 1998

THE SALESFORCE PROFICIENCY ANALYSIS  
(SPA): A NEEDS ANALYSIS STUDY TO  
DETERMINE THE PRODUCTIVITY  
GAP BETWEEN THE TOP AND  
BOTTOM PERFORMERS  
WITHIN A SALESFORCE

Formal Report Approved:

  
\_\_\_\_\_  
Report Adviser

  
\_\_\_\_\_  
  
\_\_\_\_\_

  
\_\_\_\_\_  
Dean of the Graduate College

## ACKNOWLEDGMENTS

I would like to express my appreciation to Leo McKnight, Director of Training and Development at HILTI Inc., for giving me the opportunity to assist on the SPA project for my internship. This internship provided me with a wonderful work environment, great people to work with and most important, valuable hands-on experience. A special thank you is extended to Libby Davis, for always being there for me whenever I needed help. I will miss her endless smile, her bright, bubbly spirit and her singing.

My sincere appreciation is extended to my major advisor, Dr. Bob Nolan, for his support, constructive guidance, and friendship. My appreciation is extended to my other committee members Dr. Jim Gregson and Dr. Bill Venable for their time and assistance.

I would like to extend my appreciation to my friend Carol James, for all her support and encouragement during these past two years. A special thank you for providing suggestions and assistance for this project.

I would also like to thank my parents and my family and friends not mentioned whose support and encouragement helped me through this project. My sincere appreciation is expressed to my two wonderful boys, Tommy and Anthony, for being so supportive and understanding when I missed their activities. Thank you for all of your hugs and kisses, they made my day.

Finally, I would like to express my sincere appreciation to my best friend and husband Tom, whose strong support and encouragement gave me the confidence to complete this project. I couldn't have done this without all of your love---Thank you!

## TABLE OF CONTENTS

Chapter	Page
I. INTRODUCTION.....	1
History.....	1
Statement of the Problem.....	3
Purpose of the Study.....	3
Objectives.....	4
Assumptions.....	4
Limitation.....	4
II. REVIEW OF LITERATURE.....	5
Importance of Training.....	5
Effective Sales Skills.....	8
Sales Manager's Influence.....	13
Summary.....	18
III. METHODOLOGY.....	20
Population.....	20
Development of Survey Instrument.....	21
Analysis of data.....	24
IV. FINDINGS.....	26
Product Knowledge .....	26
SSS Skills.....	28
General Issues and Feedback.....	32
V. CONCLUSIONS, RECOMMENDATIONS AND SUMMARY.....	36
Conclusions.....	36
Recommendations and Summary.....	40
BIBLIOGRAPHY.....	43

APPENDIXES	Page
APPENDIX A GENERAL ISSUES/ COMMENTS FEEDBACK QUESTIONNAIRE DATA TABULATIONS AND OPEN-ENDED QUESTIONS DATA TABULATIONS.....	47
APPENDIX B HILTI TIME LOG.....	58
APPENDIX C SURVEY INSTRUMENTS.....	63
APPENDIX D CORRESPONDENCE.....	102

## LIST OF TABLES

Table		Page
1	THE SALESFORCES' PRODUCT KNOWLEDGE TEST SCORE AVERAGES.....	27
2	THE SALESFORCES' PRODUCT KNOWLEDGE TEST SCORE MEDIANS.....	27
3	SSS SKILLS DIMENSIONS SCORE AVERAGES.....	32

## LIST OF FIGURES

Figure		Page
1	SSS SKILLS TEST SCORE COMPARISON OF THE SALESFORCE FOR POSITIVE OPENINGS.....	29
2	SSS SKILLS TEST SCORE COMPARISON OF THE SALESFORCE FOR IDENTIFYING NEEDS/ OPPORTUNITIES....	29
3	SSS SKILLS TEST SCORE COMPARISON OF THE SALESFORCE FOR TRADITIONAL/CONSULTATIVE SALES.....	30
4	SSS SKILLS TEST SCORE COMPARISON OF THE SALESFORCE FOR D.I.S.C.....	30
5	SSS SKILLS TEST SCORE COMPARISON OF THE SALESFORCE FOR HANDLING CUSTOMER ATTITUDES.....	31
6	SSS SKILLS TEST SCORE COMPARISON OF THE SALESFORCE FOR CLOSING.....	31



## CHAPTER I

### INTRODUCTION

The following report describes an internship project completed in the Training and Development department of HILTI Inc.. The HILTI group, founded in 1941, operates worldwide as a specialized leading supplier to the commercial and industrial construction industries. Their markets concentrate on building construction, civil engineering, plant maintenance, and mechanical and electrical installations. HILTI has production plants located in Europe, the United States and Asia. Both corporate headquarters and the parent plant are located in Schann, Principality of Liechtenstein. Corporate headquarters for HILTI U.S. (HUSCO) and for HILTI's customer service center are located in Tulsa, Oklahoma.

Approximately 12,000 people are employed by the HILTI group, predominately in sales. Others are employed in production plants, administration and research and development units around the world.

HILTI's core product lines include powder-actuated fastening systems (DX), drilling and anchoring systems, screw fastening systems and chemicals. Products are sold through global direct sales and distribution centers. HILTI's products have a reputation around the world for top quality, safety and innovation.

#### History

During the first quarter of 1997, upper management conducted a study to review and develop a new corporate strategy directed toward moving HILTI into

the 21st century. HILTI's new strategic goal was to have significant profitable growth at least proportionate to sales growth and to be a market leader in all product areas.

HILTI had historically been a product driven company but in recent years had not met revenue or profit growth goals. HILTI's direct salesforce was regarded as a competitive advantage and was acknowledged as being superior to competitors in terms of its problem solving capabilities. HILTI was under pressure by other direct sales companies and full-line integrated suppliers, such as Home Depot, who were improving their service to compete with HILTI. HILTI's competitors were changing their marketing strategies through product, service or price. While HILTI continued to have superior brand awareness and maintained its technical leadership, the premium charged for leadership in customer service was under pressure.

This study conducted for HILTI identified a significant productivity gap within the salesforce. This study further determined that structural factors, such as account size, type of customer and degree of product specialization, contributed to approximately 70% of the productivity gap. Tenure or years in service appeared to be the primary structural factor for differences in productivity, although, account size, type of customer and degree of product specialization were also factors.

This study suggested that the remaining 30% gap was possibly due to salesforce management issues. Salesforce management issues included factors like recruitment, product knowledge, sales skills, time management,

compensation and incentives. It was this remaining 30% gap within the salesforce that HILTI was concerned with and had decided to investigate further.

A needs analysis was conducted to identify the factors contributing to the salesforce's productivity gap. Zemke and Kramlinger (1982) defined a needs analysis as a process of identifying the knowledge, skills, and attitudes needed for individual and organizational improvement. They also mentioned, that identifying the factors that are contributing to the gap will provide useful insights into what may be causing the performance problem, new people who need training, older people who need motivation, or all people who need better management (Zemke & Kramlinger, 1982). The HILTI needs analysis project was named The Salesforce Proficiency Analysis (SPA).

#### Statement of the Problem

While structural issues such as tenure, account size, type of customer and degree of product specialization were identified as contributing factors to the productivity gap, the degree of influence that the salesforce management factors such as product knowledge, sales skills, compensation and incentives had on the productivity gap was uncertain. The SPA intended to determine whether the bottom salesforce performers could become as productive as the top performers or at least the average performers. The SPA also intended to identify the obstacles inhibiting the salesforce from achieving higher productivity.

#### Purpose of the Study

The purpose of this study was to analyze the skills and competencies of the salesforce to determine the gap between the top and bottom sales

performers.

### Objectives

The SPA had two objectives. The first objective was to determine the gap between the top and bottom sales performers. The second objective was to identify the key areas of this performance gap.

### Assumption and Limitations

An assumption of this study was that the bottom sales performers would score poorly in product knowledge and strategies for successful selling (SSS) skills than the top sales performers.

A limitation of this study was that the Regional Managers administered and collected the questionnaires. The salespeople could have felt intimidated when responding to questions concerning the effectiveness and satisfaction of their Regional Managers and regional sales meetings. This could have influenced the poor response rate to the open-ended questions on the General Issues/ Feedback Questionnaire, as well as, the integrity of some responses. Another limitation was that the salespeople were suppose to have used their product catalogs, price books and technical guides during the Product Knowledge test. However, some of the salespeople had forgotten their price catalogs etc., which could have lowered their score in product knowledge.

## CHAPTER II

### REVIEW OF LITERATURE

Faced with growing competition, an increase in high technology and a more informed and demanding customer base, marketing executives believe that having a top performing sales team is critical to their organization's success (Volper, 1996; Graham, 1997). A salesperson's sales performance can be influenced by many factors such as training, degree of sales skills, the sales manager, compensation and benefits, and communication within the organization. The following literature review will discuss how training, sales skills, and the sales managers can impact the performance of the sales force.

#### Importance of Training

Personal selling is the most important marketing tool for many industrial firms and has been called "the means through which business marketing strategy is executed (as cited in Honeycutt, Ford & Tanner, 1994, p. 65). Because personal selling is so important, companies spend a tremendous amount of money to train their salesforce. Training is a tool used by sales companies to improve the performance and effectiveness of their organizations salesforce. Training for both salespeople and sales managers is critical. Sales guru, John Fenton stated, "Effective training is the back bone of industry and should be looked upon as an investment (Grocer, 1997, p. 1)." The sales training literature reported that any salesperson can sell new products that are competitive if armed with the right information and good training. Training is the key. Honeycutt, Ford & Tanner (1994) mentioned that training programs can

provide the following benefits: assist sales people in overcoming common causes for failure, increase productivity, improve morale, reduce turnover, improve customer relations, improve planning and time management, and decrease selling costs.

Although many companies may provide training, few companies seem to understand the process (Liston, 1996). The training literature raised a number of problems associated with industrial sales training programs. Training programs, especially for new products, tend to be written and designed by experts who are usually the product designer or engineer. Product designers and engineers do not understand the selling process, therefore, these training programs are not as effective as when designed by experts in the selling process. The literature reported that the information presented focuses on product design rather than on how to sell the product (Liston, 1996).

In a study conducted by Honeycutt, Ford & Tanner (1994), salespeople raised training questions concerning sales managers. The salespeople complained about complex skills being presented before prerequisite skills were adequately addressed. For example, a demonstration on how to prepare a presentation is presented before the salespeople know how to identify and prioritize customer's needs. To learn a new skill it is necessary for salespeople to have acquired the other skills needed to use the skill being taught. Salespeople also responded that managers frequently fail to follow up or reward new behaviors resulting in sales reps reverting back to previous practices (Honeycutt, et al., 1994). Liston (1996) added that sales managers who typically

are used as the trainers, and prepare for these presentations by attending workshops, sometimes are not the best trained trainers. As a result, sales training sessions led by sales managers end up confusing the team and are viewed as a waste of selling time because the salespeople still do not know where to begin.

The sales training literature reported that open communication between sales management and trainers (Honeycutt, Ford & Tanner, 1994; Dubinsky & Staples, 1982; Liston, 1996) and customers (Honeycutt, Ford & Tanner, 1994; Dubinsky & Staples, 1982) is imperative when preparing and designing training programs. Factors that can impact how successful a training program may be are: needs assessments; setting specific, measurable, and timely objectives; evaluation; and follow-up (Honeycutt, Ford & Tanner, 1994). Additional factors are good organization and planning, a focus on customer service, problem solving, and, most importantly, providing the sales team with the skills, knowledge and motivation to sell the product (Grocer, 1997; Liston, 1996; McAllister, 1996).

Training for sales managers is also important because the entire success of the salesforce and organization is dependent on effective management. The sales training literature suggested that salespeople will not perform as well as they could if the managers are not good. Liston (1996, p. 2) stated, "Effective training teaches learners how to use the information in a selling context and guides them through specific elements of the sale." Liston defines the selling process as "the skillful use of the right information" and explains that effective

product training involves more than “I talk, you listen”. He defines skills and concepts and differentiates between how the two are taught. Skills are “how to” processes that are needed to sell a product (p.3). Skills are learned by doing, such as finding and qualifying a client. Concepts, on the other hand, are information needed to sell a product and can be lectured. Concepts may be items like the products’ price, availability, and product line. Liston (1996, p. 4) added that,

Even when they understand the difference, they don’t know how to advocate the product until I teach it as a skill. Once they know about features and benefits, I demonstrate a few times how to make complete selling sentences from the phrases; then they create their own. After a learner has practiced this step a few times successfully, they ‘own’ the skill and can perform it almost automatically back on the job.

Recognizing how important sales managers are to the success of the organization, Sheperd and Ridnour (1996) surveyed sales management training executives on the training of sales managers. Their study found that workshops and on-the -job training are the main approaches used to train sales managers. Role plays followed by seminars and case studies were the most popular activities used. Larger firms tend to use case studies more often and rate them most effective of the three.

### Effective Sales Skills

Ridlehuber (1997, p.1) stated: “Arguably, some believe that sales success, can be attributed to intuition---the person ‘born’ to sell.



Fortunately, most skills required to achieve exceptional results can be learned and improved with practice.”

The sales literature noted, successful sales skills as knowing the product/service and its benefits, planning, acquiring, presenting, closing and understanding the customers’ needs, wants, expectations. Although one skill may have been mentioned as being more important than another effective and successful selling requires know how and use of all these sales skills.

Every year one out of three salespeople either fail to reach their selling goals or quit their company while others do all right but never reach their full potential (Wechsler, 1995). Wechsler, in his book *The six steps to excellence in selling*, contended that most salespeople fail because they were never taught the profession of selling. He explained (1995, p.2),

Imagine what would happen if you were given a scalpel on the first day of medical school, pointed toward the operating room where a patient was waiting and told by the chief surgeon to “go get ‘em.” Many salespeople are put into situations like this because no one gave us the tools or taught the techniques necessary to be successful in a selling environment.

Wechsler (1995), identified six steps to the selling process: find the prospect, find the decision maker, arrange an appointment, ask the right questions and listen, present the solution and ask for commitment. While the components of sales success are known and understood, implementing them is more difficult. A research study, conducted by a management consultant firm, identified seven techniques that differentiated top-performing salespeople from

their average-performing peers (Volper, 1996). The following discusses the common techniques discovered in this study and reported in the sales literature on successful sales skills used by exemplary or top performers

Top performers tend to set secondary call objectives for every customer contact (Volper, 1996; Graham, 1995; Wechsler, 1995). Wechsler, in his book (1995) discusses his process of finding and qualifying a prospect. He explained that once his prospect is qualified and can or has the potential to produce the volume needed, he will continue to call the prospect until told not to. Wechsler's own selling experience has indicated that the best accounts were typically opened after five to seven contacts. Graham (1995) reasoned that a lost sale or prospect occurs because the salesperson decided when the client should place the order. He suggested figuring out how the customer thinks and then getting on the client's schedule. Graham (1995, p.5) stated, "Any customer who expresses an interest in a product or service will buy. Astute salespeople recognize this buying signal and make sure to maintain a presence with the prospect." Of importance to the top performers is not making an immediate sale, but ensuring that they have a constant pipeline of prospective clients in various stages ready to place an order. Excellent selling is the development of patience and persistence that culminates in a sale at the right time.

Another successful sales skill reported was that top performers ask more and better questions (Volper, 1996; Wechsler, 1995; Graham, 1995; Kahle, 1997). Asking the right questions is a critical selling skill that conveys an image of competence and trustworthiness (Kahle, 1997), creates a comfort level and

provides credibility (Graham, 1995). Good questions and active listening enable the salesperson to gather information about the customer's needs, wants, expectations (Kahle, 1997), company goals, and current/previous situations (Wechsler, 1995) that will later assist in the sale. Good questions and active listening also establish a seller/customer relationship by showing the customer that the salesman is concerned about them and their business.

The study and the sales literature reported that top performers make an initial benefit statement showing knowledge of the account and its needs (Volper, 1996; Wechsler, 1995; McCune, 1994; Graham, 1995). Wechsler (1995, p.124) stated, "people buy benefits, the elements that make a product or service important to them." He maintained that the seller's competitive edge was tailoring the presentation to the individual by defining the attributes, strengths and weaknesses that differentiated their product from their competitors. McCune (1994, p.2) agreed saying, "If you've got a product that can make his business better, you've got a sale." Graham (1995) concurred that customers are drawn to those who are assertive when it comes to good ideas. He suggested concentrating on ideas and focusing on letting people know that your ideas are what makes you different. Successful salespeople will differentiate themselves and show the customer how his business can be improved.

Top performers also tend to stop a presentation the moment they detect an objection (spoken or in body language) to clarify and confirm the objection, and thank the client for sharing it (Volper, 1996; Wechsler, 1995). Volper (1996) and Wechsler (1995) both view this objection as an uncovered need and

concluded that responding to it quickly adds confidence to the salesperson's credibility. Dealing with objections is a difficult part of selling. However, the process of overcoming objections can be simplified by knowing in advance how to answer the objections. Top performers develop an annual territory marketing plan, which is reviewed quarterly (Volper, 1996; "How much do you know", 1996; Ridlehuber, 1997; Reinfeld, 1996; Wechsler, 1995). Ridlehuber (1997, p.1), explained that defining specific sales and prospecting goals is not sufficient. He stated, "incorporating the year's strategic objectives into a written plan that includes tactical strategies and activities for achieving the goals is essential." According to Reinfeld (1996), successful professional salespersons make it a point to periodically evaluate themselves and their activities to determine if they are still on track. Developing and operating from a marketing plan with goals and strategies is crucial because without one a salesperson essentially will fail. When developing a plan it is important that the goals and objectives are realistic and not filled with too many activities (Volper, 1996, et al.). A realistic plan prevents procrastination, problems that cause delay, and is a tool that helps the salesperson stay on course.

A final skill reported in the study and sales literature was that top performers continually develop themselves through sales training and educational seminars (Volper, 1996; "How much do you know", 1996; Graham, 1995; Reinfeld, 1996) and are constantly trying to motivate themselves by listening to motivational tapes or reading inspirational books (Volper, 1996; Wechsler, 1995). Successful salespeople focus on what it takes, learning skills,

strategies or just learning to understand what makes people tick, to get them to the top.

### Sales Manager's Influence

Sales managers play a pivotal role in the development and success of a salesperson and the overall success of the sales organization. As the business world rapidly changes becoming more technical and competitive, so does the job of the sales manager. In the past, sales managers were primarily responsible for hiring, motivating, and producing a strong salesforce (Monnier, 1996). Today's sales managers, referred to by Monnier (1996) as "process management", are responsible for customer focus, providing corporate vision, coaching, being a team leader/facilitator, having business management skills and business knowledge (Monnier, 1996; Simonsen, 1997). Dubinsky, Howell, Ingram & Bellenger (1986) and Stone & Good (1994) added recruiting and performance evaluations, all to be performed concurrently with discovering new opportunities.

In a sales organization, typically the top sales producers are promoted into management positions based on their performance or sales figures (Fraza, 1996; Maynard, 1996; Monnier, 1996; "Star Salespeople", 1996) and usually without management training (Simonsen, 1997). The assumption is that a good salesperson will make a good sales manager. However, according to the sales management literature, the problem is, what is done in sales is not necessarily what is done in managing. Selling and managing are two different situations calling for two different kinds of skills and orientation (Fraza, 1996; Monnier, 1996, "Star Salespeople", 1996). As a result, many managers are in these

managerial positions lacking the skills and abilities necessary to be truly effective sales managers. It is the sales manager who can really make the difference between an average versus an outstanding sales team. In the end, the ultimate goal of a sales manager is growth in his salesforce and in profits. Their success is dependent upon both of these factors, because a sales manager can not succeed on his own.

In the sales manager literature Fraza (1996), Monnier(1996) and Simonsen (1997) discussed common characteristics inherent to building quality management skills and a high performing sales team. The following discusses the development and use of all these management skills that are essential to be a successful and effective sales manager.

According to the literature reviewed, one skill of a successful sales manager is to strategically develop and maintain a marketplace advantage. Simonsen (1997,p.71) mentioned that maintaining a marketplace advantage is achieved by developing a salesforce of “customer service experts”. Monnier (1996) agreed and suggested focusing on meeting or exceeding customers needs, wants and expectations. Maynard (1996) discussed establishing a customer partnership built on trust. To develop customer service experts, sales managers must concentrate on areas that need improvement, in particular, skills training. Skills training should be continuous and designed to teach basic selling skills such as prospecting, probing, presentations, closing and product knowledge. According to the literature reviewed, going on calls with the salesperson is another way for the manager to upgrade the team’s skills. Going

on calls helps the manager to identify the techniques the salesperson applied from the last training session and problem areas. Simonsen (1997, p.72) stated “Managers must set realistic goals and then clarify how salespeople are to achieve them and offer specific plans for desired change.” She added, that the manager’s expectations must be clearly communicated in order for the salespeople to know what is expected of them.

Successful sales managers clearly communicate the corporate vision and ensure that each salesperson understands how to achieve his goals within the corporate strategy. The literature reported that managers should clearly communicate the corporate vision by teaching salespeople how to understand both the corporate and the customer’s marketing objectives as they relate to the overall strategic business plan (Monnier, 1996; Simonsen, 1997; Maynard, 1996; Stone & Good, 1994). When salespeople understand their customer’s strategies then they can help customers build demand for their products (Simonsen, 1997; Maynard, 1996; Stone & Good, 1994).

In a competitive marketplace, both the manager’s and the organization’s success are dependent on the managers receiving internal and external information to make rapid and frequent decisions. Stone & Good (1994, p. 281) stated, “Information enhances the quality of decisions and enables managers to maintain a competitive edge in the marketplace.” The availability and quality of information tremendously influence the organization’s overall performance and the individual sales reps performance since both are based on sales. Findings in a study conducted by Stone & Good (1994) indicated that companies provide

little competitive environmental information to their sales managers. A lack of external information causes managers to become competitively vulnerable to organizations that do provide quality information. The study further suggested that the organization should help sales managers determine what information is needed.

The literature referred to successful sales managers playing numerous leadership roles. As coach, teacher or team leader, a sales manager must first gain respect and trust from the group. Respect and trust are earned by showing knowledge in the product and market, in addition to helping the group solve problems. Miller stated, "a good sales manager teaches his newest salespeople and continues to coach the more seasoned sellers. He is someone who recognizes when a salesperson needs help and then pulls from his resources to offer that help (Fraza, 1996, p. 2)." Monnier (1996) discussed that sales managers as coach or team leader provide feedback, rewards and recognition (Trumfio, 1995) that improve performance and help employees feel valued. He added that the manager guides the team to work together to achieve objectives and share responsibility for the group's success. In a survey of marketing and sales managers, 32% indicated that listening is critical for guidance and helping to solve problems (Simonsen, 1997; Trumfio, 1995).

Another criteria for being a successful sales manager involves their management abilities. Sales managers have a tendency to concentrate on sales numbers or quotas because these figures are tangible (Franza, 1996; Maynard, 1996) and it is these figures that upper management uses to hold sales



managers accountable. According to Monnier (1996), successful management skills involve business management and business knowledge. Business management was discussed as being more than focusing on top line revenue; it is managing the profitability of the sales unit, managing time, budgets, and resources. He explained business knowledge as understanding your company's business, customers' businesses, competitors' strategies, industry trends, and market conditions.

A constantly changing and competitive business environment has made managing sales operation more complex for today's sales manager. The sales manager literature discussed the use of computers becoming increasingly important in the sales industry for accessing, analyzing and helping managers manage business operations. The use of computers makes it more efficient to identify changes in product purchasing trends (Alter, 1992; Stone & Good, 1994), to be notified in advance of client orders (Laudon, 1991; Stone & Good, 1994), and to track alteration in competitive prices (Taylor, 1991; Stone & Good, 1994). The information recorded by the salesforce is potentially one of the most valuable sources of reliable marketplace information (Stone & Good, 1994). Managers and salespeople who have the technical know-how to access computer information yet fail to use it risk falling behind competitively and negatively influencing the organization's performance. The sales manager literature reported recruiting as another essential skill for successful sales managers. Although recruiting from a manager's perspective may not seem as important as what one does with the recruit, the sales manager literature

suggested otherwise. Hiring the right people is suggested to be the most important skill for a manager to develop (Dubinsky, Howell, Ingram & Bellenger, 1986; Simonsen, 1997). Job satisfaction, employee commitment/involvement and performance are factors that can influence the salesforce's success. Findings from a study conducted by Dubinsky, Howell, Ingram & Bellenger (1986) indicated that if recruiters can give the prospective employee a more realistic picture of the sales job, the chances for greater satisfaction with the job, employee commitment and performance are enhanced. The study also suggested that the goal of recruiting and selection is to find an individual whose needs and skills are compatible with the company's environment and that "who one recruits" is more important than what one does with the recruit, especially since the nature of the job and the organization are a given.

### Summary

A salesforce is a valuable asset to a company because a company's sales success is indicative of its overall success. Training, sales skills, and sales managers are critical factors that can impact a sales organizations performance and, in turn, its success.

Training salespeople and sales managers is imperative. Given the high costs associated with training and the importance of personal selling to the firm's success, training must be effective. For a training program to be effective, open communication, good planning, designing, evaluation and follow-up are needed. Selling affects a business totally, and without a well-trained salesforce (Grocer, 1997) and manager a company will not prosper.

Selling is a dynamic and complex process with success depending on the salesperson having effective sales skills. The sales literature reported that a top performing sales organizations must have effective sales skills to be productive. As Industrial Psychologist Dr. Lousig-Nont stated, "There are certain techniques that are universally used by successful salespeople in the sales profession. Sales success is a matter of learning the basics and becoming proficient at them ("Just do it", 1997, p. 4)."

A more technical and competitive sales environment has made managing a sales operation more complex today than ever before. To be a truly successful sales manager, a manager must have the effective skills and abilities necessary to lead a salesforce. Sales managers must have knowledge of the industry and must have leadership abilities. They must have the ability to deal with people, address problems, and maintain the respect of employees. They must be able to coach, assess goals, and help each of their sales people to create strategic sales plans.

## CHAPTER III

### METHODOLOGY

This chapter explains the procedures followed in SPA for selecting the population sample, developing the testing instrument and analyzing the data. The purpose of SPA was to determine whether the bottom sales performers could become as productive as the top sales performers or at least the average performers by analyzing the skills and competencies of the top and bottom performers. According to Thomas Gilbert, author of *Human Competence*, this can be accomplished by discovering if there is a significant difference between the average performer and the high performer or “exemplar” who proves that a high level of performance is, indeed, achievable (as cited in Zemke & Kramlinger, 1982). Exemplary performers are individuals within the organization who are already performing in a quality manner and are yielding the desired operational results (Robinson & Robinson, 1995; Zemke & Kramlinger, 1982; Gilbert, 1978).

To accomplish the purpose of this study, SPA tested the salesforce's level of product knowledge and sales skills and surveyed their attitudes and opinions regarding general issues like the effectiveness of their regional managers and regional sales meetings, compensation and incentives.

#### Population

The population for the SPA was the HUSCO's 600 person salesforce which was divided into three specialty business units (SBU's): construction, mechanical and electrical and industrial. A sample from the population was

selected based on two criteria: profitability and sales territories that had not been restructured within the past twelve months. Profitability was defined as gross sales minus cost. The sample was segmented by SBU's, net sales and gross margin to achieve a distribution. From this distribution, 50 salespeople from the top 15% and 50 salespeople from the bottom 15% were chosen to comprise the total sample of 100 salespeople.

### Development of Survey Instrument

The SPA used three questionnaires to collect both quantitative and qualitative data on: a) product knowledge, b) sales skills, c) the effectiveness of regional managers and regional sales meetings, compensation and incentives. According to Robinson & Robinson (1995), questionnaires or surveys, are recommended when assessing performance because: 1.) quantifiable data can be collected; 2.) they are ideal for reaching small or large geographic locations; 3.) questions can be presented in a consistent manner; and 4.) they are cost effective.

The questions were developed by HILTI product and marketing managers, and the training department. Many of the product knowledge test questions were taken from HILTI's basic sales training evaluation exams.

The product knowledge test was comprised of 120 questions that were divided into six product categories: DX, concrete cutting and coring, drilling, anchoring, screw fastening and chemicals. The questions were comprised of combinations of multiple choice, true/false, and fill in the blank type questions focusing predominately on new products introduced within the past year.

Calculations were required for a few questions by the salespeople.

The SSS test was an assessment of the salesperson's sales skills. The SSS test was comprised of 18 weighted, scenario type questions dealing with all elements of strategies for successful selling. Each scenario had three possible responses, each weighted +2,-2, or -1, with one response being the most effective. The salesperson's effectiveness was assessed on six dimensions of sales skills: positive openings, identifying needs and opportunities, traditional versus consultative sales, a personal profile system called D.I.S.C. (Dominance, Influence, Steadiness and Conscientiousness), handling customer attitudes and closing. Traditional sales referred to one sales strategy being used during the selling process. In contrast, consultative sales referred to the salesperson adapting his/her sales strategy to fit the need of the customer and selling situation.

D.I.S.C. is a personal profile system that helps individuals understand themselves and others better by identifying behavioral patterns associated with four profiles or behavioral styles (Carlson Learning Co., 1994). The purpose of D.I.S.C. was to help the salespeople identify their customer's profile and adapt their selling strategy to meet the demands of the situation.

The General Issues/Comments Feedback questionnaire surveyed the salesperson's opinions on various issues that could impact and influence a salesperson's performance. The following issues were surveyed: regional sales managers abilities, effectiveness of the regional sales meetings, HILTI's training program and compensation benefits. The questionnaire was comprised of 15

questions using a ten point Likert scale where one equals extremely ineffective and ten equals extremely effective. Additional space was provided for feedback. The strongest technical reason for using the questionnaire data collection method was to gather quantitative information (Zemke & Kramlinger, 1982; Robinson & Robinson, 1995).

The Product Knowledge, SSS and the General Issues/Comments Feedback questionnaires were pretested for clarity and understanding on HILTI's technical support and customer service sales group. Pretesting the questionnaires was important and ensured that the questions and jargon used were understood by the participants. Pretesting ensured reliable information (Zemke & Kramlinger, et al). Feedback from the technical support and customer service sales group was positive. Minimal changes were made to the questionnaires.

Sales personnel were identified on all the questionnaires except the General Issues/Comments Feedback questionnaires where anonymity was provided. Sales personnel were told that the data would be kept confidential and that the data would be reported in the aggregate.

The questionnaires were mailed to and administered by HILTI Regional Managers during the regional sales meeting. A cover letter explaining the purpose of the study and instructions on how to administer the tests were included. The Product Knowledge test was an open book and timed exam. The SSS test was also a timed exam. Upon completion, all the questionnaires were returned to the Regional Managers and mailed back to the HILTI Training and

Development department. A total of 96 questionnaires were returned for a 96% response rate.

### Analysis of Data

Descriptive statistics were used to analyze the quantitative findings for all three survey questionnaires. The quantitative data were manually scored and tabulated against a master key. The tabulated data were entered into a Microsoft Excel program where means were calculated. Median scores were also calculated for the Product Knowledge test due to individual variability of scores within the test and to provide additional analyses. For example, if a person scored very low on one product area, that one score decreased the individual's overall average and in turn, impacted the overall group average.

In calculating means for the SSS data, each sales skill dimension had a possible total score range between negative six and six, where negative six represented least effective and six represented most effective. A negative total score was possible. Since averages can not be calculated with negative values, the range of scores were assigned a value between one and 10, where negative six represented the value of one, negative five represented the value of two, etc.. To determine the average, the number of respondents for each score were multiplied with the assigned value, all scores were totaled then divided by the total number of respondents and rounded. The average was then converted back to the original score value. For example, with the positive opening dimension, a total score of two was assigned a value of eight. If the average was 7.50, then the average would be rounded to equal eight and the value of



eight converted back to the assigned score of two.

The qualitative findings from the General Issues/Comments Feedback questionnaire were tabulated from the raw data. The tabulated data were then condensed and categorized based on common response. After the data were condensed and categorized, the most and least frequent responses were used to identify specific findings.

## CHAPTER IV

### FINDINGS

The findings identified the gaps, the key areas that contributed to the gaps, and also identified areas of improvement within the top 15% and the bottom 15% sales performers. The findings were reported separately for Product Knowledge, SSS Skills and the General Issues and Feedback questionnaires.

#### Product Knowledge

The analyzed data for the product knowledge test was based on a total of 50 salespeople from the top 15% and 46 salespeople from the bottom 15%. Means and medians were computed. The score averages for individual product area knowledge provided a more accurate assessment of the salesforces' product knowledge than the overall total product knowledge score average because of the individual's variability of scores within the test. For example, a very high or low score in one product area would effect the total product knowledge mean score for that individual.

When comparing the averages (see Table 1) in total product knowledge between the top and bottom sales performers, the scores indicated a seven point gap. On average, top sales performers scored 81 in total product knowledge as compared to 74 for the bottom sales performers.

When comparing medians (see Table 2 ) in total product knowledge, between the top and bottom sales performers, the scores indicated a smaller four point gap. The median score in total product knowledge for top sales performers was 82 as compared to 78 for the bottom sales performers.

Table 1  
The Salesforce's Product Knowledge Test Score Averages

<u>Sales Group</u>	<u>Total Score</u>	<u>DX</u>	<u>Concrete /Coring</u>	<u>Drilling</u>	<u>Anchoring</u>	<u>Screws</u>	<u>Chemical</u>
Top 15%	81	86	82	80	75	75	79
Bottom 15%	74	82	74	73	70	72	77
Gap							
Difference	7	4	8	7	5	3	2

In Table 1, when comparing the average scores between the top and bottom salespeople for individual product categories, the greatest product knowledge gaps were indicated in concrete/coring, an eight point difference, drilling, a seven point difference, and anchoring with a five point difference. The top performers' scores were higher in each of these product categories having averages of 82, 80 and 75 respectively, as compared, to 74, 73, and 70 for the bottom sales performers.

When comparing the median scores, in Table 2, for individual product categories, between the top and bottom sales force, drilling was the only product category that indicated a five point or greater gap. In drilling, the top performers' the bottom sales performers median score was 81 as compared to 76 for

Table 2  
The Salesforce's Product Knowledge Test Score Medians

<u>Sales Group</u>	<u>Total Score</u>	<u>DX</u>	<u>Concrete /Coring</u>	<u>Drilling</u>	<u>Anchoring</u>	<u>Screws</u>	<u>Chemical</u>
Top 15%	82	88	84	81	74	73	80
Bottom 15%	78	84	80	76	71	73	80
Gap							
Difference	4	4	4	5	3	0	0

## SSS Skills

The analyzed data for the SSS Skills assessment was based on a total of 38 useable questionnaires from the top 15% sales group and 41 useable questionnaires from the bottom 15% sales group. The SSS assessment findings were based on total individual dimension scores. The total scores for each dimension could have been negative six, negative five, negative four, negative three, negative two, negative one, zero, two three and six.

The findings indicated no major gaps (see Figures 1- 6) in the sales skills dimensions when comparing the top and bottom sales groups. An explanation for not finding any major gaps between the top and bottom sales groups was that the SSS Skills test tested for knowledge of sales skills rather than actual sales skills abilities. Although both groups had the SSS skills training knowledge, only the top sales performers implemented the learned skills in the field.

Figure 1

SSS Skills Test Score Comparison Of The Salesforce For Positive Openings

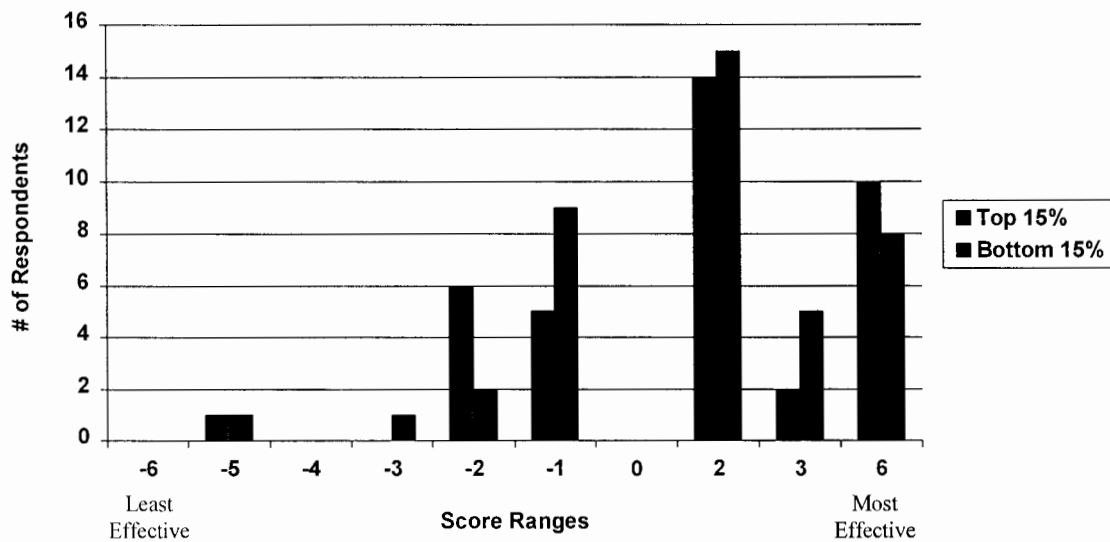


Figure 2

SSS Skills Test Score Comparison Of The Salesforce For Identifying Needs/Opportunities

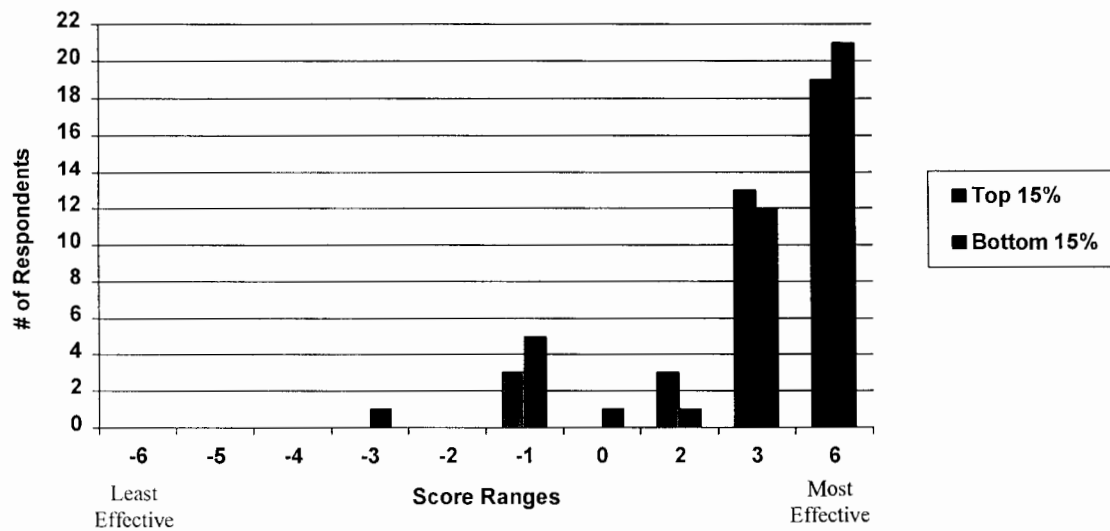


Figure 3

SSS Skills Test Score Comparison Of The Salesforce  
For Traditional/Consultative Sales

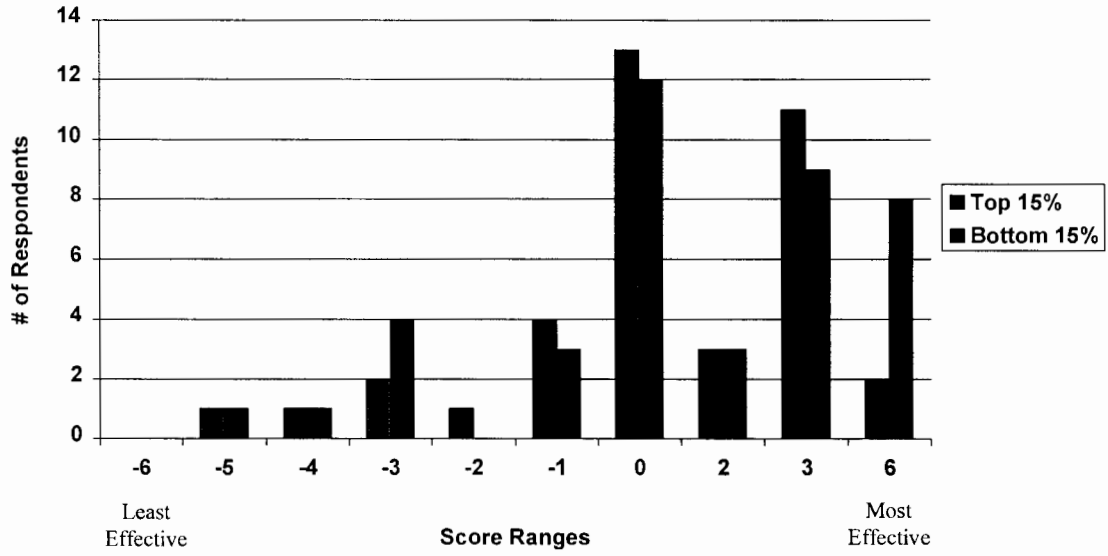


Figure 4

SSS Skills Test Score Comparison Of  
The Salesforce For D.I.S.C.

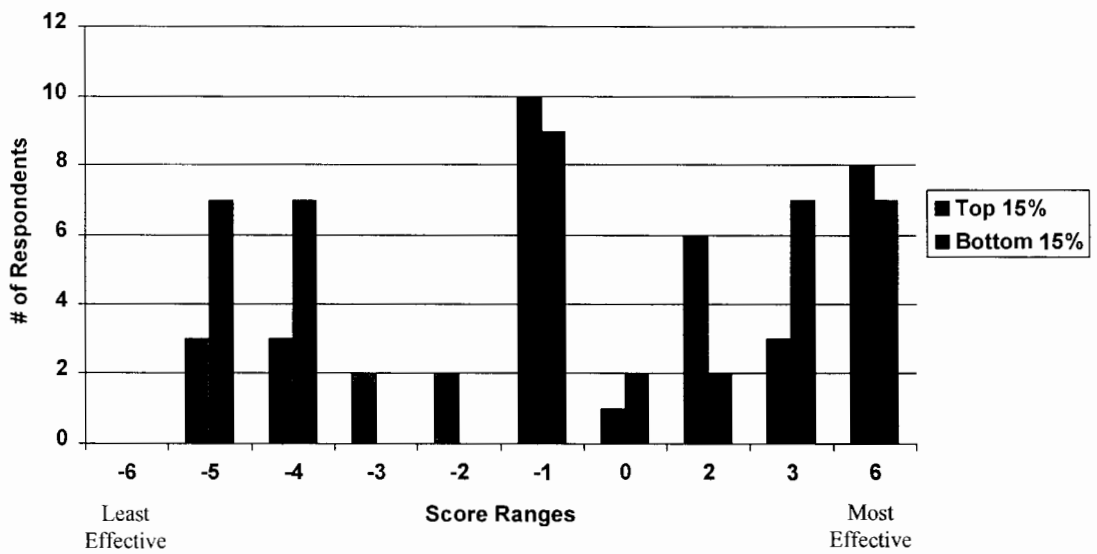


Figure 5

SSS Skills Test Score Comparison Of The Salesforce  
For Handling Customer Attitudes

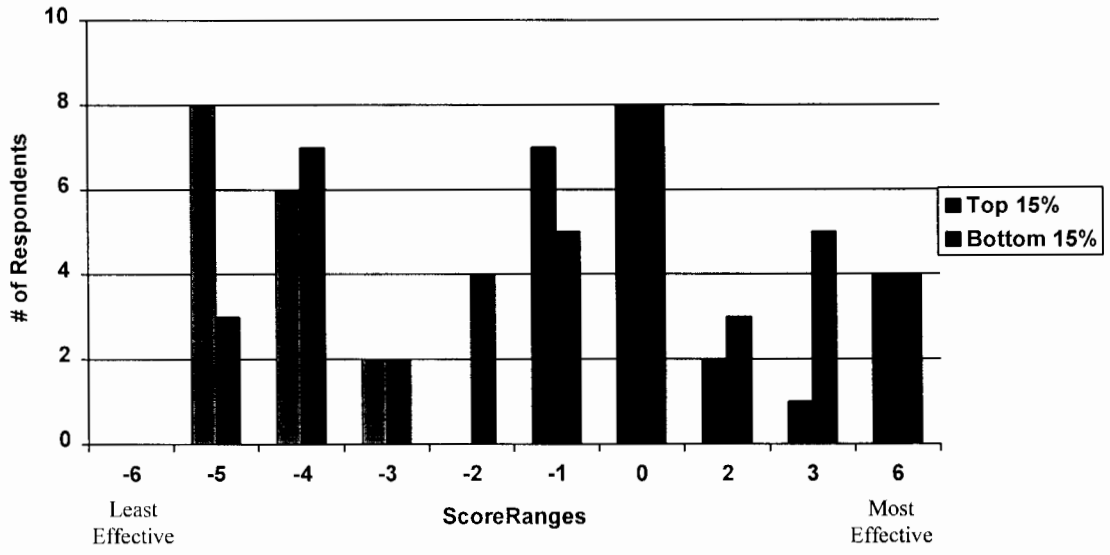
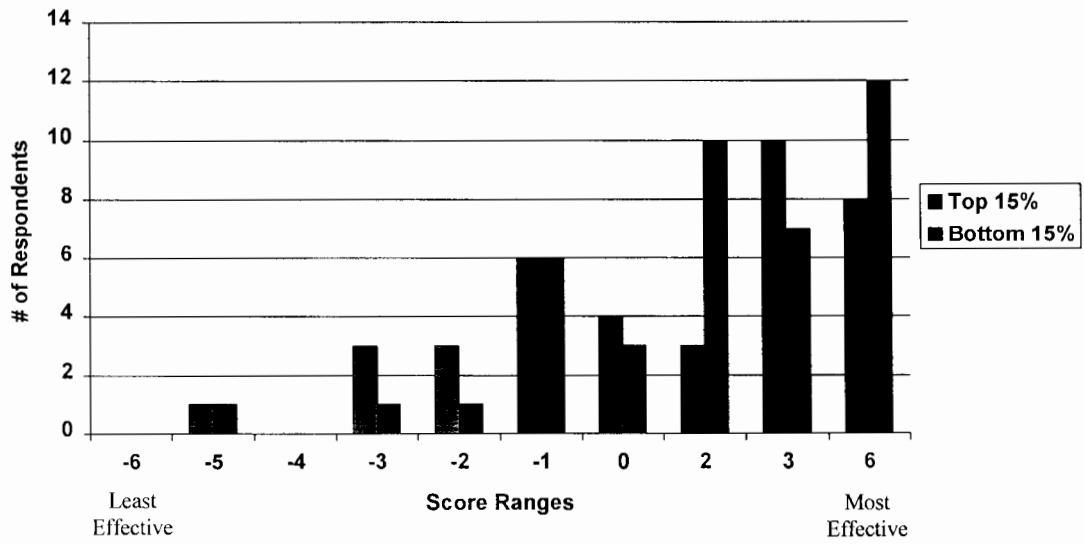


Figure 6

SSS Skills Test Score Comparison Of  
The Salesforce For Closing



Overall, as a group the SSS skills dimension score averages (see Table 3) indicated a need for improvement in all areas of sales skills for both the top and bottom sales performers. These findings raised a question concerning the validity of the testing instrument because the top sales group scored poorly.

Table 3

SSS Skills Dimensions Score Averages

<u>SSS Skills Dimensions</u>	<u>Top 15%</u>	<u>Bottom 15%</u>
Positive Openings	2	2
Identifying Needs/Opportunities	3	3
Traditional/Consultative Sales	0	2
D.I.S.C.	0	-1
Handling Customer Attitudes	-2	-1
Closing	2	2

The possible total scores for each SSS Skill Dimension were

-6, -5 , -4 , -3, -2 , -1, 0, 2, 3 , 6  
least effective most effective

General Issues and Feedback

The analyzed data for questions one through 14 (see appendix A) were based on a total of 96 returned questionnaires. Averages were computed using a ten point Likert scale where one equaled a poor rating and ten equaled a positive rating. The open-ended questions (Appendix A) were based only on those who responded.

Questions one through four referred to HILTI's training programs. Overall, HILTI's salesforce was satisfied with the training program. Respondents rated the following criteria in the seven point range for HILTI's training program:



organization, clarity, innovativeness, issues covered and responsiveness of trainer. HILTI's training offerings were rated 7.6 when compared to other organization's training programs. SSS skills training was rated a 6.6, regarding how relevant the material was to the sales process. Some training programs the salesforce would like to see HILTI offer are advanced product/application training, rated 8.0, segment specific training, rated 7.4, territory planning & organization, rated 7.0, and understanding the construction cycle, rated 6.3.

Questions five through nine were related to the effectiveness of the Regional Managers and the regional sales meetings. Respondents rated the effectiveness of their regional sales meetings on the following criteria as follows: organization, 8.1; clarity of presentation, 7.9; coverage of key issues, 7.6; responsiveness to voiced concerns, 7.2; and frequency of meeting, 7.1. Regional Managers received an overall effectiveness rating of 8.5 from the salespersons. Respondents rated the Regional Manager's coaching ability on the following criteria as follows: in performance management process, 8.0; sales management process, 8.1; territory planning & organization, 7.9; prospecting for new accounts, 7.8; product knowledge, 8.3; product applications, 8.5; and SSS Sales Skills, 8.3. Thirty percent of the salespeople ride with their Regional Manager once every two months. Slightly more than a quarter of the salespeople ride with their Regional Manager between once every six weeks and once a month. The effectiveness of the Regional Manager's territory van rides were rated on the following criteria as follows: the organization, 8.2; framework for assessment, 8.0; their sales coaching during the trip, 8.2; product coaching

during the trip, 7.9; and analyzing the territory potential, 7.8.

For question ten, the salespeople rated the effectiveness of new product introductions on the following criteria as follows: understanding the new products full benefits (PFB's), rated 7.6; understanding the market and potential customers for the new product, rated 7.2; the salesperson's comfort level in demonstrating the new product, rated 7.7; and the salesperson's confidence to sell the product was rated 7.8.

Questions 11 through 14 were concerned with HILTI's compensation plan. HILTI'S total compensation plan overall, was rated 5.7 and was viewed as not being fair or competitive. The compensation plan was rated 6.2 overall, concerning whether it motivated the salesforce to sell as much as possible each quarter. Schedule one of the commission schedules was rated 7.2 overall, concerning whether it motivated salespeople to sell as much as possible. HILTI uses several commission schedules for their product lines. Products in schedule one pay the highest commissions. Question 14 which asked, "The current plan motivates me to reduce my discounts?", was rated overall a 6.7 by respondents.

Nearly all the questions allowed space available for additional comments. Most questions with the exception of questions 15, had very few responses. All the responses to the open-ended questions can be viewed in appendix A.

Question 15, which asked, "My compensation plan would incentivize me to sell more if....?", had a total of 77 respondents replied. The most frequent responses to this question were: "no cap on quarterly bonus", replied by 20 out of 77 respondents; 11 out of 77 respondents mentioned, "higher or better

commissions”; and “no bogey and based on gross margins not discounts” was mentioned by ten out of 77 respondents. Eight out of 77 respondents specifically mentioned, “Leave the forecast out”. Seven out of 77 respondents replied, “they were afraid of the forecast coming out every year”.

## CHAPTER V

### CONCLUSIONS, RECOMMENDATIONS AND SUMMARY

This study sought to analyze the skills and competencies of the salesforce to determine whether the bottom sales performers could become as productive as the top performers or at least the average performers. The first objective of this study was to determine the gap between the top and bottom sales performers. The second objective was to identify key areas of this performance gap. The conclusions summarize the findings discovered in the Product Knowledge, SSS, and the General Issues and Feedback questionnaires. The conclusions were supplemented with findings from the Wilson Learning study, conducted in conjunction with SPA, that provided additional insight into factors that contributed to the productivity gap. Actual numbers from the Wilson Learning report were not documented because of confidentiality. However, according to the Wilson Learning report (1997), a gap greater than five points was considered statistically significant at the .05 level.

#### Conclusions

Several gaps were identified in SPA between the top and bottom sales performers. In total product knowledge, a 7% gap was discovered when comparing the averages, specifically in the concrete/coring (8% difference), drilling (7% difference), and anchoring (5% difference) product categories, with the top performers out scoring the bottom performers. When comparing the medians, a smaller 4% gap was discovered in total product knowledge, with the greatest gap in the drilling (5% difference) product category. Findings from the

Wilson Learning study supported the SPA's product knowledge results.

According to the Wilson Learning study (1997) a large 12 point gap existed between the top and bottom sales performers in product knowledge concerning product applications. A smaller, yet still significant, 8 point gap between the top and bottom sales performers existed in product knowledge concerning features and benefits. These product knowledge gaps in features and benefits and in product applications have contributed to the performance gap.

No real gaps were indicated in the SSS questionnaire results between the top and bottom sales performers. As a group the SSS skills score averages indicated a need for improvement in sales skills for both top and bottom salespeople. These findings raised questions concerning the validity of the testing instrument because the SSS Questionnaire tested sales skills knowledge rather than abilities of sales skills. The validity of the testing instrument was also questioned because the top sales group performed poorly.

Other factors could have influenced the poor SSS scores and in turn the productivity gap. Namely, the salespeople's 6.6 rating of the SSS skills training class with regard to its relevance to the sales process, in the General Issues and Feedback questionnaire. Their average rating of the SSS skills training class raised the question concerning whether the salespeople's average rating of the SSS skills training class had any influence on their poor scores and on the productivity gap. In other words, if the SSS skills training class was not valued by the salespeople, were these skills used in the field? The content and design effectiveness of the SSS skills training class should be

reevaluated. Another question was raised concerning whether the regional managers conveyed the importance of the SSS skills to their salesforce and whether the regional managers reinforced the implementation of these skills in the field. According to the sales training literature reviewed, managers who failed to follow up or reward new behaviors resulted in the salespeople reverting back to previous practices (Honeycutt, Ford & Tanner (1994). Further research would need to be conducted to determine the answers to these questions.

Data in the Wilson Learning study identified specific areas in sales skills abilities that have contributed to the performance gap. The data revealed differences concerning how the top and bottom salespeople positioned their products and or services to meet their customers' vision and business strategies. According to the Wilson Learning study (1997), large gaps existed in sales versatility, defined as how flexible or adaptive the salesperson was to different interpersonal styles of customers. Specific ways the top salespeople adapted better than the bottom salespeople were in handling different customers' buying styles, an 11 point gap, customers' resistance, a 10 point gap, and in handling customers relationships, an eight point gap. Both Academic and practitioner personal selling literature ( Weitz, Sujan, and Sujan, 1986; Porter, 1976; Wechsler, 1995) discussed how practicing adaptive selling behaviors impacted the salesperson's selling effectiveness. According to Porter (1976) to practice adaptive selling effectively, the salesperson needs knowledge of various sales situations, sales behaviors and contingencies that link specific behaviors to situation.

The Wilson Learning study identified other areas in the bottom sales group that lacked effective sales skills. According to the Wilson Learning study (1997), an 11 point gap existed in customer knowledge concerning how well the salespeople understood their customer's business operations and objectives. Large gaps also existed in the sales process between the top and bottom salespeople. The top salespeople performed better than the bottom salespeople specifically, in how the sale was approached, a 12 point gap; presented, a 10 point gap; and closed, a 14 point gap. Additional smaller gaps were identified in how the salespeople acquired and qualified new business. According to the Wilson Learning study (1997), there was an eight point gap in how the salespeople prioritized sales business and a five point gap in how new customers were qualified. These gaps identified in the Wilson Learning study provided specific sales skill areas that contributed to the performance gap.

When the salespeople were surveyed concerning what additional training programs HILTI should offer, high ratings were given to advanced product/application, rated 8.0; segment specific training, rated 7.4; and territory planning & organization, rated 7.0. These high ratings were important because the Wilson Learning study indicated large skill gaps in areas related to the specific training programs the salespeople felt HILTI should offer. According to the Wilson Learning study (1997), large gaps existed between the top and bottom sales performers in their competitive approach and in strategic planning. Competitive approach referred to how the salespeople handled their competition in the territory. Specific gap areas in their competitive approach were noted in

competitive knowledge, a 12 point gap, and competitive strategy, a seven point gap. The Wilson Learning study (1997) also identified an 11 point gap in setting strategy which deals with how the salespeople strategically plan. The gaps noted here between the top and bottom salespeople's competitive approach and strategic planning process were critical and provided additional explanations for the performance gap between the top 15 % and bottom 15% in the salesforce.

HILTI's total compensation plan, rated 5.7, was viewed as not being fair or competitive. The compensation plan was rated 6.2 concerning whether it motivated the salesforce to sell as much as possible each quarter. The implications of HILTI's salesforce viewing their compensation plan as being unfair, noncompetitive and unmotivating were critical. The extent or degree to which the compensation plan had influenced the performance gap in this case, are unknown. Further research would need to be conducted. However, a compensation package that is perceived to be unfair or does not motivate or empower the salesforce can impact sales performance and productivity. According to Trumfio (1995), compensation and benefits plans should change when they no longer motivate, when they stop working or when the company or products objectives change. Simonsen (1997) added that commissions must be based on clear, realistic, goals and a territory divided equally, otherwise, the morale and enthusiasm of the team will be killed.

### Recommendations and Summary

As mentioned earlier in the literature review, knowledge of the products, benefits, and understanding the customers' needs, wants, and expectations are



all important sales skills. A recommendation for HILTI was to provide continuous product knowledge training especially in the area of product application processes. In addition, Regional Managers should receive training to assist their salespeople in analyzing and understanding HILTI's and their customers' business better. Regional Managers should also provide more information on their competitors, the territory, and help supply prudent leads to the salesforce. Increased knowledge in products applications along with a better knowledge base of HILTI's and the customers' business operations should help increase growth.

The findings in the Wilson Learning study supported the conclusion in this study that continuous sales skills training was needed. A recommendation was to reevaluate the content and design of the SSS skills training class. If needed, a new sales skills class should be designed and developed to provide better sale skill abilities to the salesforce. In the interim, a recommendation for the Regional Managers was to stress the implementation of effective sales skills and to provide reinforcement when these sales skills are used in the field. As mentioned in the literature review, reinforcement is especially critical after recipients repeat the sales skills training class.

Another recommendation was to reevaluate HILTI's hiring process for its salesforce. Further research is needed to determine if the top sales performers possess certain personality characteristics as compared to the bottom performers. According to Dubinsky, Howell, Ingram & Bellenger (1986), it is important to recruit and select people whose needs and skills are compatible

with the job and the organization.

The implications of HILTI's salesforce viewing their compensation plan as being unfair, noncompetitive and unmotivating are critical. A final recommendation was to restructure the compensation package. A suggestion was to base commissions on the previous years sales taking into consideration an unusual good/poor month with less emphasis on forecasts. A commissions package that is viewed by the salesforce as being fair and competitive will produce positive results in the long term.

## BIBLIOGRAPHY

Alter, S., (1992). Information systems: a management perspective. Massachusetts: Addison-Wesley.

Carlson Learning Co. (1994). D.I.S.C. Dimensions of Behavior, Minneapolis: Carlson Learning Company.

Dubinsky, A. J., Howell, R. D., Ingram, T. N. & Bellenger, D. N., (1986). Salesforce socialization. Journal of Marketing, 50, 192-207.

Dubinsky, A. J., & Staples, W. A. (1982). Sales training : salespeople's preparedness and managerial implication. Journal of Personal Selling and Sales Management, 2, 24-31.

Fraza, V. (1996, Nov.). So, you want to be the boss. Industrial Distribution, 85 (11), 62-65.

Gilbert, T. F. (1978). Human Competence. New York: McGraw Hill.

Graham, J. R. (1995, Dec.) How to keep selling when the selling gets rough, tough and terrible. American Salesman. 40 (12), 22-27.

Grocer, (1997, Nov. 1). Accentuating the positive. 220 (7329), 64.

Honeycutt Jr., E. D., Ford, J. B. & Tanner Jr., J. F. (1994). Who trains salespeople? The role of sales trainers and sales managers. Industrial Marketing Management, 23(1), 65-70.

How much do you know about productivity, (1996, Sept.). Managers Handbook, 1 (6), 4.

Just do it! facing the fear of rejection,(1997, April). American Salesman, 42 (4), 9-13.

Kahle, D. (1997, April). Your most powerful sales tool. (asking questions in selling). American Salesman, 42 (4), 16-20.

Laudon, K. C. & Laudon, J. P (1991). Management Information systems: A contemporary perspective. New York: Macmillan.

Liston, R. (1996, Sept.). Product training that works. Training, 33 (9), 62-68.

McAllister, L. (1996, May). How to build sales skills and savvy. Gifts & Decorations Accessories, 97 (5), p80-85.

McCune, J. (1994, May). The sales arsenal. Success, 41 (4), 11-14.

Monnier, J. (1996, March 25). Leadership skills for sales managers. LI Business News, 13, 7.

Maynard, R. (1996, Jan.). What the numbers may not tell you. Nation's Business, 84 (1), 21.

Porter, S.S. (1976). An empirical investigation of salesperson traits, adaptive selling, and sales performance. Unpublished doctoral dissertation, Oklahoma State University, Oklahoma.

Reinfeld, G. (1994, May). Inventory and evaluation time: periodic review for sales success. American Salesman, 41 (5), 3-6.

Ridlehuber, T. R. (1997, March). The 30-day plan: a performance-enhancing time management tool. Trusts & Estates, 136 (4), 21-22.

Robinson, D. G. & Robinson, J. C. (1996). Performance Consulting Moving Beyond Training. San Francisco: Berrett-Koehler.

Sheperd, C. D. & Ridnour, R. E. (1996). A comparison of the sales management training practices of smaller and larger organizations. Journal of Business & Industrial Marketing, 11(2), 37-47.

Simonsen, K. (1997, Nov.). Management made excellent. Folio Magazine for Magazine Management, 26 (14) 69.

Star salespeople don't always make good managers, (1996, March 15). Folio: the Magazine for Magazine Management, 25, (4), 10.

Stone, R. W. & Good, D. J (1994). Information support for sales managers. Industrial Marketing Management, 23, 281-286.

Szymanski, D. M. (1988, Jan.). Determinants of selling effectiveness: the importance of declarative Knowledge to the personal selling concept. Journal of Marketing, 52, 64-77.

Taylor, T. C. (1991). The pc evaluation: desktop.....laptop...palmtop...? top. Sales & Marketing Management, 143, 50-61.

Trumfio, G. (1995, April). Are you on par: a survey of sales and marketing executives uncovers the characteristics of a successful manager. Sales & Marketing Management, 147 (4), 89-96.

Volper, R. (1996). Seven practices of top performers. Lodging Hospitality, 52 (3), 12.

Wechsler, W. M. (1995). The six steps to excellence in selling (Ellis, K. E.). Better Books.

Weitz, Sujan H. & Sujan M. (1986). Knowledge, motivation, and adaptive behavior: a framework for improving selling effectiveness. Journal of Marketing, 50, 174-191.

Wilson Learning Corporation (1997). [Salesperformance measurement system: HILTI Inc.]. unpublished raw data.

Zemke, R. & Kramlinger, T. (1982). Figuring things out. Massachusetts: Addison-Wesley.

## APPENDIXES

APPENDIX A

GENERAL ISSUES/ COMMENTS FEEDBACK QUESTIONNAIRE  
DATA TABULATIONS AND OPEN-ENDED QUESTIONS  
DATA TABULATIONS

**General Issues/ Comments Feedback Survey  
Data Tabulations**

<b>Q1. When you reflect on the training you have received from Hilti, please rate the following criteria;</b>	<b>Degree of Satisfaction</b>
Well organized	7.5
Clear/ easy to understand	7.2
Innovative	7.0
Covers most important issues	7.2
Responsiveness of trainer	7.8
<b>Q2. When compared to other organization's training programs you have taken, evaluate Hilti's training offerings;</b>	7.6
<b>Q3. After completing SSS sales skills training, how relevant was the course material to the Hilti sales process?</b>	<b>Degree of Relevance</b> 6.6
<b>Q4. From your position as a salesperson, what additional training programs do you feel Hilti should offer?</b>	
Understanding the Construction Cycle	6.3
Territory Planning & Organization	7.0
Advanced Product/Application Training	8.0
Segment Specific Training	7.4
<b>Q5. How satisfied are you with the effectiveness of your regional sales meetings?</b>	<b>Degree of Satisfaction</b>
Organization	8.1
Clarity of Presentation	7.9
Coverage of Key Issues	7.6
Responsiveness to Voiced Concerns	7.2
Frequency of Meeting	7.1
<b>Q6. Please rate the effectiveness of your Regional Manager.</b>	<b>Degree of Effectiveness</b> 8.5



<b>Q7. Thinking about your RM's coaching ability, how would you rate him/her in the following areas?</b>	<b>Degree of Effectiveness</b>
Performance Management Process	8.0
Sales Management Process	8.1
Territory Planning & Organization	7.9
Prospecting for New Accounts	7.8
Product Knowledge	8.3
Applications	8.5
SSS Sales Skills	8.3
<b>Q8. How frequently does your RM visit your territory for a van ride?</b>	<b>Percent of frequency</b>
Once each month	26.3
Once every six weeks	27.3
Once every two months	30.5
Once every three months	10.5
Less frequently	5.0
<b>Q 9. How would you rate the effectiveness of your RM during van rides in your territory?</b>	<b>Degree of Effectiveness</b>
Organization	8.2
Framework for Assessment	8.0
Sales Coaching During Trip	8.2
Product Coaching During Trip	7.9
Analyzing Territory Potential	7.8
<b>Q10. When reflecting on new product introductions, rate the effectiveness of the introduction in terms of:</b>	
Understanding the Product PFB's	7.6
Understanding the Market & Potential Customers for the New Product	7.2
Your Comfort Level in Demonstrating the New Product	7.7
Your Confidence to Sell the Product	7.8
<b>Q11. I believe my total compensation package (base salary, bonus, commissions, promotions, prizes, etc.) is fair and competitive.</b>	<b>Degree of Agreement</b>
	5.7

<b>Q12. I believe that the current compensation plan motivates me to sell as much as possible each quarter.</b>	<b>Degree of Agreement</b> 6.2
<b>Q13. My current compensation plan motivates me to sell as much product in schedule 1 of the commission schedule as possible.</b>	7.2
<b>Q14. My current plan motivates me to reduce my discount.</b>	6.7

**General Issues/ Comments Feedback Survey  
Open-Ended Questions Data Tabulations**

	<b># of Responses</b>	<b>Percent</b>
<b>Q1. Rate other training criteria</b>		
Positive Training Comments		
• Good overall; all excellent	4	21%
• Improved remarkably over past 3 years based on Strut	1	5%
• Strut would be a solid "10"	1	5%
• Great benefit to my sales confidence	1	5%
• I'm proud to be part of team	1	5%
Training Improvements		
• Would like follow-up; tapes to review SSS; many products - hard to know all	3	16%
• General BTS to long; learned most new products on own via hands-on/read on own time	3	16%
• Training in specific product area needed; selling product depends on territory; some SBU's have more diverse products	2	11%
• Poor information on competitors	1	5%
Comments about trainers/ RM meetings		
• HILTI very professional	1	5%
• Interacts well with participants	1	5%
• Clear on all points	1	5%
• Responsive to questions in training information	1	5%
• Discussed for elementary school graduate	1	5%
• Need "hands-on" at meetings	<u>1</u>	<u>5%</u>
<b>Total respondents</b>	<b>19</b>	<b>119%*</b>
<b>Q2. Evaluate HILTI'S training compared to others.</b>		
Positive Comments		
• Others didn't come close	3	16%
• Well planned; organized	2	13%
• Good balance with hands-on & classroom	1	6%
• Similar to others, but geared toward our industry	1	6%
• Hands-on works for me	1	6%
• HILTI uses their own people vs. outside trainers	1	6%
Negative Comments		
• Improve product introductions	2	13%
• BTS was good 12 years ago	1	6%
• Dale Carnegie 6x better	1	6%

	# of Responses	Percent
Negative Comments		
• Don't know, never took other training	2	13%
• To long; better to split up in specific SBU areas	1	6%
• 1 hour presentation not enough time depending on product	<u>1</u>	<u>6%</u>
<b>Total respondents</b>	15	103%*

**Q 3. Relevance of SSS training to the sales process.**

SSS Usage

• Waste of time- would rather be out selling:	7	50%
• repetitive- covers basics we've had already		
• has not made me better or worse		
• theory & practice entirely different		
• Useful in interpersonal relations; help to understand how people think better	2	14%
• Need follow up; reemphasize skills	2	14%
• Only 1 out of 4 calls utilize SSS training	1	7%
• Probably 1 out of 2 calls utilize SSS training	1	7%
• Excellent training on total process	1	7%
• don't always have time to relate SSS skills	1	7%
• How to Improve SSS Training		
• Need more to take home & review	<u>1</u>	<u>7%</u>
<b>Total respondents</b>	14	113%*

**Q 4. Additional programs to offer.**

• Product knowledge	3	21%
• SBU specific: chemicals, reading blueprints	3	21%
• More competitive information	2	50%
• Selling to turn a profit	1	7%
• Customer recognition program	1	7%
• Hands on sales training	1	7%
• Dale Carnegie	<u>1</u>	<u>7%</u>
<b>Total respondents</b>	14	120%*

**Q 5. Satisfaction with effectiveness of RSM.**

Frequency of Meeting

• Time well spent:	6	26%
• informative		
• interesting		
• well organized		
• fun		
• very satisfied		
• 4 meeting a year sufficient	3	13%

	# of Responses	Percent
• 3 meeting a year sufficient	1	4%
• Meetings OK, not to long / often	1	4%
Dissatisfied with meeting		
• To many issues & not enough time spent on key issues:	6	26%
• many items can be mailed		
• read at home		
• Meetings to long & waste of valuable selling time	4	17%
• To many meeting:	3	13%
• discuss same problem every month		
• don't have topics just to kill time		
• Need more competitive information	1	4%
Meeting Improvements		
• Annual/ semi annual meeting should have bigger impact on product develop & roll out	2	8%
• Set meeting at beginning of quarter	1	4%
• Set date & keep it	1	4%
• 2 day meeting or workshop with product or marketing manager presenting new product	<u>1</u>	<u>4%</u>
<b>Total respondents</b>	<b>32</b>	<b>127%*</b>

#### Q6. Effectiveness of RM.

##### Positive General Comments

• Very reliable:	5	29%
• never let me down		
• business taken care of promptly		
• Best MTS I've ever had	4	24%
• He's new at position	2	12%

##### Demonstrating Skills

• Good overall; effective with problem solution	3	18%
• Excellent coach:	3	18%
• has good ideas for working with customers		
• great people & sales skills		
• Well organized; little irrelevant activity	2	12%
• Treats everyone fairly; extremely ethical	2	12%
• Improved managing skills with people in past year	1	6%

##### Improvements Needed

• Listening skills	1	6%
• Use mail or CD Rom to introduce smaller products	1	6%
• Stretched through meetings	<u>1</u>	<u>6%</u>
<b>Total respondents</b>	<b>17</b>	<b>149%*</b>

	<b># of Responses</b>	<b>Percent</b>
<b>Q 7. RM's Coaching Ability.</b>		
Positive		
• Excellent Coach:	5	50%
• excellent in SSS		
• good consulting skills		
• diplomatic		
• Great job - pleased in all aspects	2	20%
• Presents products creatively	1	10%
Improvements		
• He's new & will improve in time	1	10%
• listening & communication skills	1	10%
• "Out of loop" with product knowledge & application	<u>1</u>	<u>10%</u>
<b>Total respondents</b>	<b>10</b>	<b>110%*</b>
<b>Q 9. Effectiveness of RM during van ride.</b>		
• The best- adds to my abilities	3	38%
• Not always clear of opportunity available & path to attain them	2	25%
• Use RM for new accounts vs. regular customers	1	13%
• He's new & will improve in time	1	13%
• To many negative comments- not motivating	<u>1</u>	<u>13%</u>
<b>Total respondents</b>	<b>8</b>	<b>102%*</b>
<b>Q10. Effectiveness of New Product Introductions.</b>		
Improvements Needed		
• Lacks effective training:	6	35%
• to many introductions. at one time		
• Tulsa overstates potential		
• should be shorter & harder hitting		
• Rushed to market:	4	24%
• not tested enough before introduction		
• Need new promotional items	1	6%
Ability to Sell New Products		
• Need more time to teach product:	3	18%
• more confidence		
• hard to understand product		
• No market no sale:	2	12%
• no exposure to sell product		
• Need more competitive information	2	12%
Customers tell us what product quality is	2	12%
• New product introductions well done	<u>1</u>	<u>6%</u>
<b>Total respondents</b>	<b>17</b>	<b>143%*</b>

	<b># of Responses</b>	<b>Percent</b>
<b>Q 15. Compensation plan would be incentive if:</b>		
<b>Promotions</b>		
• No Bogey, better promotions:	10	13%
• paid per tool		
• based on performance not bogey		
• unrealistic monthly total limit		
• larger bogey penalizes larger territories		
• promotions weren't based on previous figures		
• some areas don't have same opportunity		
• Work off salary & commission:	3	4%
• reflect less on promotions		
• always seem to be shooting lots target with 1 bullet		
• More \$ available- like old promotions	2	3%
• Like year long promotion to win prize	1	1%
• Easier to understand promotions	1	1%
<b>Volume</b>		
• Based on gross margins not discounts:	10	13%
• Compensation based on overall profit		
• based on high volume		
• based on profitability of product sold not mix company wants		
• pay on gross margins		
• Compensate me for results not a percent of them	1	1%
<b>Commissions</b>		
• Higher / better commissions:	11	14%
• more up front instead of larger bonus		
• tied less to bonus		
• Higher commissions on schedule 1 & 2 tools	4	5%
• Commissions tied to profit margins	3	4%
• Better commissions on new products	1	1%
• Discounts distributed fairly	1	1%
• When product overpriced & high discount, more likely to help customer	1	1%
<b>Forecast</b>		
• Leave out:	8	10%
• forecast not the all		
• more emphasis on growth		
• pay on profits generated		
• break tie with forecast		
• so much concentration on forecast affects GM		
• Afraid of forecast increase that comes out every year:	7	9%
• didn't hit so hard coming off a good year		
• affects your ability to reach bonus		
• do good one year get chaffed next		

	<b># of Responses</b>	<b>Percent</b>
• Unfair forecast system	2	3%
• Don't know how it is for other markets/territories	1	1%
<b>Bonus</b>		
• No "cap" on quarterly bonus:	20	26%
• no incentive to sell once max out		
• no limit on bonuses		
• include extra money amount for each percent I was over in forecast		
• family shouldn't be held back potential income		
• No bonus	5	6%
• Leave bonus same next year	4	5%
• Better defined bonus	1	1%
• More bonus money	1	1%
<b>Salary</b>		
• Increase base salary	5	6%
• Salary & commission only	4	5%
• No salary raise in last five years	3	4%
• No "glass ceiling" on income level	2	3%
• Didn't lose large percent of my income by base growing	1	1%
<b>Price</b>		
• Penalized for high discounts to be in competitive market	2	3%
• Adjusted for regional pricing	<u>1</u>	<u>1%</u>
<b>Total respondents</b>	<b>77</b>	<b>151%*</b>

## **GENERAL COMMENTS**

### About HILTI

• Great company- great place to work	12	63%
• Seen a lot of change some good some bad	2	11%
• Good change move from "what's good for me" to "what's good for customers"	1	5%
• My manager is great motivator	1	5%

### Bonus/ Promotions

• Lift cap on bonus	3	16%
• Family promotional items- get spouse to help motivate	2	11%
• More commissions	2	11%
• Current bogey figures penalize high performer	2	11%
• Limit number of promotions in same product group	1	5%



	<b># of Responses</b>	<b>Percent</b>
Forecasting		
• pays well if achieve forecast	4	21%
• took out 1 good year in old days		
• good year penalizes next year		
• not motivating		
• Impossible to make bonus	1	5%
Training		
• More emphasis on salesmen development- selling skills & overcoming objections	3	16%
• More emphasis on content- product knowledge versus program	2	11%
• Condense & simplify training	2	11%
• Keep up with training & refresher curses	1	5%
Product Introductions		
• Make bigger splash with introductions	1	5%
• If product big deal make it one	1	5%
• Use new technology, ie: video, slides, computers	1	5%
Other		
• Fix current inventory problem to reduce shipments & inconvenience to customer	1	5%
• So away with steel fabricators	1	5%
• Stop OEM's being shipped to territory	<u>3</u>	<u>16%</u>
<b>Total respondents</b>	<b>19</b>	<b>248%*</b>

**\* Percent greater than 100% due to multiple responses**

APPENDIX B  
HILTI TIME LOG

## HILTI TIME LOG

<b>Date</b>	<b>Time</b>	<b>Activities</b>	<b>Personal Thoughts</b>
7/18/97	10 min.	Initial telephone contact	Felt good
7/22/97	1.15 hrs	First meeting to discuss proj. Proposal to Dr. Nolan Project approval	Relaxed, casual, friendly envir. Estab. good rapport. Project sounds interesting!
8/11/97	3.15 hrs	Transcribed tape of first meeting	
8/12/97	2 hrs.	Transcribing conti.	
8/13/97	35 min.	Transcribing conti.	Done---finally!!!
8/26/97	2.45 hrs	Tabbed Sales force Proficiency Analysis (SPA) questionnaires	
9/3/97	5 hrs	Tabbed SPA questionnaires	
9/4/97	5.15 hrs	Tabbed SPA questionnaires	
9/5/97	5 hrs	Stuffed transfer learning questionnaires (TLQ)	
9/8/97	5 hrs	Finished stuffing TLQ & tabbed SPA	
9/9/97	5.30 hrs	Meeting w/ Hogan & Greenwood; tabbed SSS	
9/11/97	5 hrs	Tabbed SPA questionnaires	
9/12/97	5 hrs	Tabbed SPA & SSS questionnaires	
9/15/97	2 hrs.	worked on report-outline, backgr.	
9/16/97	5 hrs	Tabbed SPA & SSS questionnaires	Need to improve prod. intros.....to many RM's no consistency w/ prod. intros.
9/17/97	5 hrs	Tabbed SPA & SSS questionnaires	
9/18/97	5 hrs	Tabbed General Feedback questionnaires	Q's anonymous, but mailed back w/ SPA & SSS....how open were they?
9/19/97	5 hrs	Tabbed General Feedback questionnaires	

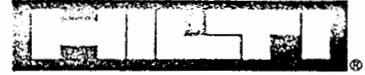
<b>Date</b>	<b>Time</b>	<b>Activities</b>	<b>Personal Thoughts</b>
9/23/97	5 hrs	Tabbed General Feedback open - ended questions	Dissatisfied w/ sales forecast....could this influence sales? Need to improve forecast process
9/24/97	5 hrs	Tabbed General Feedback open - ended questions	
9/25/97	5 hrs	Entered SPA data in computer	
9/26/97	5 hrs	Entered SPA data in computer	
9/29/97	5 hrs	Entered SSS data in computer	
10/1/97	5 hrs	Entered open - ended data & dodge values in computer	One poor prod. score....don't know prod. so don't sell or prod. not used/sold a lot so don't know prod.? Get % of sales
10/2/97	5 hrs	Analyzed open - ended data	
10/3/97	4.15 hrs	Analyzed both open - ended data & avg, medians btwn top & bottom	Not much dif. btwn prod. knowl.....other factors influe. gap?
10/6/97	6 hrs	Analyzed open - ended data	
10/7/97	6.30 hrs	Entered open - ended data analysis in computer	
10/8/97	4 hrs	Worked on internship report	
10/9/97	4.15 hrs	Listened to customer service (CS) calls	Friendly wk. environ., cust. prob. handled fine, no irate cust., CS supports sales force w/addl. sales made
10/10/97	3 hrs	Listened to technical support (TS) service calls	Calls differ from CS, TS supports prod.: answers q's abt. prod. use, application etc.
10/13/97	5 hrs	Entered computer data: prod. knowledge & sales % for prod. sold	
10/14/97	5.15 hrs	Summarized SPA	
10/15/97	5.15 hrs	Entered General Feedback questions in computer	

<b>Date</b>	<b>Time</b>	<b>Activities</b>	<b>Personal Thoughts</b>
10/16/97	5 hrs	Entered General Feedback questions in computer	
10/21/97	4 hrs	3 C staff meeting	
10/22/97	5 hrs	Summarized General Feedback	
10/23/97	5 hrs	Summarized SSS	Bad results...dif. to summarize; Leo says SSS not reinforced @ RM; SF says SSS not valuable
10/24/97	5 hrs	Sat in on BTS: Chemicals prod. line	Interesting prod.....invent by talking w/ cust.; very innovative R&D, but trad. organ. structure
10/27/97	4 hrs	Entered computer data: prod. knowledge scores broken down in ranges btwm top & bottom	
10/28/97	6 hrs	Worked on internship report; transcribed 3C staff meeting	
10/30/97	6.30 hrs	Put SSS skills in ranges	
10/31/97	4 hrs	Meeting w/ Greenwood	Mgrs. comm. prob., prod. knowl., competition & skills gap
11/1/97	2 hrs	Transcribed Greenwood	
11/2/97	4.30 hrs	Transcribed Greenwood	
11/3/97	5 hrs	Prod. Know. & SSS divided by SBU's	
11/4/97	5 hrs	Transcribed Greenwood	
11/5/97	3 hrs.	Transcribed Greenwood & Leo's Summary of Greenwood meeting	
11/6/97	3.30 hrs.	Worked on report	
11/7/97	2 hrs.	Transcribed Greenwood	
11/8/97	4 hrs	Transcribed Greenwood	
11/9/97	2 hrs	Transcribed Greenwood	
11/10/97	5 hrs	Consolidated Greenwood charts	
11/11/97	5 hrs	Consolidated Greenwood charts	
11/12/97	5 hrs	Transcribed Greenwood	
11/14/97	5 hrs	Analyze Greenwood Data	Why combine TS & MGR's on behav. anal. chart? Gap inflated?

<b>Date</b>	<b>Time</b>	<b>Activities</b>	<b>Personal Thoughts</b>
11/15/97	2 hrs	Worked on internship report	
11/16/97	3 hrs	Worked on internship report	
11/17/97	4 hrs	Prod. Knowl. Chart who made forecast & had poor scores ; Worked on internship report	

APPENDIX C  
SURVEY INSTRUMENTS

Hilti, Inc.  
5400 S. 122nd E. Avenue  
P.O. Box 21148  
Tulsa, Oklahoma 74121  
Phone (918) 252-6000, Telex 20-3668



---

To: From: **Leo McKnight** Date: **August 4, 1997**

---

Subject: **Strategy 3C** Ref:

---

Copies to:

As you are aware during the past eight months Hilti has been analyzing its Strategy beyond the year 2000. This analysis has led to the new Strategy 3C.

- > Customer
- > Competency
- > Concentration

As part of this analysis a team has been formed to evaluate the effectiveness of our recruiting and training processes. To accomplish this we have designed the following approach.

- > A product knowledge test
- > SSS Sales Skills test
- > A territory salesperson questionnaire
- > A 360° Sales Performance measurement system (from Wilson Learning)

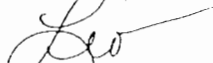
The 360° feedback instrument is designed to get feedback from yourself, your salesperson and most importantly five of your salespersons customers, all concerning their overall sales performance. (We will contact your T/S directly to choose the customers)

Please make arrangements to meet with the following territory salespeople at your upcoming Regional Meeting. The overall process will take approximately four hours.

Our thoughts were that you could possibly meet the evening prior to your Regional Meeting or the morning after. Please use the attached checklist to administer the tests and questionnaire and return them in the appropriate envelopes.

Any questions please call.

Thanks,

  
Leo x 6740



## Regional Manager Instructions

### Salesforce Proficiency Project

Please use this checklist to administer the testing and questionnaires for yourself and your salespeople. (1 per salesperson)

- Administer the 120 question product knowledge test.
  - Open book test catalog, Pricebook, Technical Guides, Firestop catalog etc...
  - 2 1/2 hours maximum time
  - **Mail/return to Tulsa Attention : Training Department in enclosed envelope.**
  
- Administer the 18 questions SSS Skills Assessment
  - 30 minutes maximum time
  - **Mail/return to Tulsa Attention: Training Department in enclosed envelope.**
  
- Have Salesperson fill out the Wilson Learning Sales Performance Measurement System.
  - Make sure its the Salespersons Questionnaire
  - **Mail/return to Tulsa Attention: Training Department in the enclosed envelope.**
  
- Regional Manger please fill out the Wilson Learning Sales Performance Measurement System.
  - Make sure its the manager questionnaire.
  - **Mail/return to Tulsa Attention: Training Department in the enclosed envelope.**
  
- Have Salesperson fill out the Territory Salesperson questionnaire.
  - **Mail/return to Tulsa Attention: Training Department in the enclosed envelope.**

*Please sign and return the checklist to Tulsa.*

\_\_\_\_\_  
Regional Manager

\_\_\_\_\_  
Territory Salesperson

Hilti

## Salesforce Proficiency Analysis

Name \_\_\_\_\_

SBU: \_\_\_\_\_

## DX Proficiency

- 1) What are the fastener ranges of the DX-A40:
- a) With the X-AM32 magazine? 14-32mm  $\frac{1}{2}'' - 1\frac{1}{4}''$
- b) With the single fire baseplate? 12-47mm  $7/16'' - 1\frac{7}{8}''$
- 2) Give three features and benefits of the DX-A40?
- power regulator - precise fastening
- fully automatic - saves time during installation
- accepts modular pole tool - eliminates ladders and scaffolding
- quite - indoor use*  
*speed - more fastening per min.*
- 3) When using the DX-36M to temporarily attach a 3/8" thick steel angle with a 5/16 predrilled hole to average concrete, which fastener should be used?
- a) W6-11-22P8
- b) W6-20-27D12
- c) EW6-11-12D12
- d) W6-20-27P8
- 4) A customer wants to order 100 DX pins to permanently attach 1/4" thick signs into average concrete. (Assume there is no spalling problem.) What is the item number and description of the pin that you would recommend for this customer?
- Item Number: 34353 Description: X - DNI32P8
- 5) To fasten a 2x4 to average concrete using a DX-36M, what fastener should be used?
- a. NK62S12
- b. X-DNI 42 P8
- c. DS-72P10
- d. X-DNI 62 P8
- 6) The DX-36M has available, a magnetic baseplate for fastening nails and loose washers.
- X  True or   False
- 7) A contractor is putting down 2x4's to concrete (corrosion not a factor). He is extremely price sensitive. What is your recommendation? (Price is the only factor and he wants to use a pin with a washer.)
- X-CF72 P8 S23 / DX A Combo

- 8) A contractor is working in an area where he needs a fastener with 316 stainless steel properties. He wants to shoot. What do you recommend?  
X-CR Pins
- 9) The allowable tension load value of a X-ZF nail embedded 3/4" into 4000 psi concrete is 90.
- 10) In the nomenclature W6-20-22D12, the "20" refers to thread length
- 11) The shank diameter on the X-EDNI is 0.145
- 12) FCM grating discs are available in hot dipped galvanized, electroplated, and stainless steel
- 13) What is the length of the pin in the following fastener: CC27 DNI 32 P8 / for the DX-A40?  
32mm or 1 1/4"
- 14) The DX-E72 uses which booster? .22 caliber - single cartridge
- 15) A customer needs to attach a 1/4" thick steel angle to average concrete. The 1/4" steel has a 5/16" pre-drilled hole. He has a DX-A41. The angle is to be removed from time to time. Which fastener should be used?
- |                 |                  |
|-----------------|------------------|
| a. DS32P8       | c. W10-30-27 P10 |
| b. W6-11-12 D12 | d. W6-20-27 FP8  |
- 16) The nomenclature of the fastener used to temporarily fasten an electrical box to 3/8" steel using the DX-451 is:
- |                  |
|------------------|
| a. W6-11-17 D12  |
| b. EDS-19 P10    |
| c. EW6-11-12 D12 |
| d. W10-30-32 P10 |
- 7) Name 4 of the 6 safety features on Hilti DX tools.
- contact pressure safety
- tilt safety
- drop firing safety
- accidental firing safety
- Low volatility / Pistol drive*

4259A

18) A customer is working in a corrosive environment. He wants to fasten 1/8" thick sign to concrete with a DX-36M. He wants to use a 1/4" stud. What do you recommend?

X-CR W6-11-27FP8

19) A customer wants to fasten "hat track" (metal furring strips) to a concrete wall. He owns a DX-35. He needs a narrow access setup. You would select:

- a. 21/F3-1 Guide and 21/S1 Baseplate
- b. 21/F2-1 Guide and 21/S2 Baseplate
- c. 21/F2-1 Guide and 21/S1 Baseplate
- d. none of the above

20) A customer has a DX-36M and is putting down roof deck (type B) to bar joist (1/8" thick). What fastener do you recommend?

X-EDNK22-THQ12 HSN

21) Which decking fastener for a DX-750 would you recommend in Grade 50 structural steel? (The customer will be using the magazine tool.)

ENPH2-21-L15 (1/2")

22) A contractor has a DX-36M and is using CC 20 ZF27 P8 fasteners. He is experiencing severe spall problems but wants to shoot. What do you recommend he do? (best alternative)

CC27/AL-H27P8

23) A customer has a DX-A40 and wants to shoot X-AL-H fasteners. What does he need to do?

change to piston XAP8K-AL (use AL piston)

24) A customer wants to put a temporary wall up using metal track to concrete. What fastener do you recommend?

X-RE Pin

25) A contractor is fastening 2x4's to concrete and wants to remove the 2x4's and have no spall. What do you recommend? (DX-36M tool)

SL62

## Concrete Cutting and Coring Proficiency

- 1) The maximum bit diameter recommended for use with the DD 80E is 3 1/2"
- 2) The following methods of securing a diamond core stand are vacuum, anchoring, or a jack screw or spindle
- 3) Which reducer will a DD-BS-3/11-BC core bit require when used on the DD 250?
  - a. 114/7 - 12/20
  - b. 114/7 - 58/11
  - c. none
- 4) When drilling holes from 1/2" to 13", drill motor DD250E is recommended.
- 5) The effective drilling depths of DD-BU diamond core bits, without the use of an extension, are 11" & 17.
- 6) If a diamond blade wears too fast, the matrix may be too (hard) (soft).
- 7) List the item number of the vacuum pump that is designed for the DD-250E.  
92053
- 8) A customer has a DD-250E coring rig and would like to core into a 20" diameter pipe. They cannot anchor the rig. What is the item number and price for the baseplate that will meet their need. 232220 - 510.00
- 9) What is the benefit of a recessed segment on a diamond blade?  
delays undercutting ; remove excess slurry, to increase blade life
- 10) A continuous rim 8" blade has a diamond shaped knockout. What are the two round arbor sizes that this blade can be used on? 5/8" & 7/8"
- 11) Dry diamond core bits have acceptable performance in concrete with embedded rebar.  
 True or  False

LM250A

- 12) Glaziers use carbide tipped blades for cutting non-ferrous metals (aluminum mullion). What is the description of the blade used on a 14" cut off saw?  
SB-CSM-14 x 1 x 100T
- 13) Which core rig(s) offer three speeds? DD100, DD80E, & DD160E
- 14) What is the item number of the adapter to allow use of a DCU bit on the DD-250E rig? 9869
- 15) The standard arbor size of a diamond walk behind saw blade is 1" with a drive pin hole.
- 16) Circle all statements that are true about the DD100 coring system.
- When starting a hole "free-hand", it is best to use a low RPM.
  - DD100 is also an excellent tool for use with auger and spade type bits for wood.
  - A wet 2" core bit would require 1200 RPM.
  - DD100 dry coring range is 1/2" to 5".
  - An 8 gauge extension cord size is needed if it is being used 100' from the power source.
- 17) A cabinet company is sawing oak, maple, ash, and other woods using a table saw. The customer is looking for a 14" diameter blade that is long life and gives an extra fine cut. What is the description of the recommended blade? SB-CS-14 x 1 x 100T
- 18) Name 3 features and benefits of Hilti's DDB diamond core bits?  
easy retipping - less expensive than a new bit  
core bits for every application - versatile for anchors & thru holes  
compatible end connection - use with any style core rig
- 19) What is Hilti's bit range within the DDB diamond core line? 15/32 - 8"  
*to speed up cutting - easier to start hole  
 outside of rim on outside (4" depth) - easy to remove*
- 20) What diameter diamond blade should be used with a hand held saw for cutting concrete 4" deep? 12"
- 21) What arbor configurations will the HG 500 accept? 5/8" & 7/8"
- 22) A customer owns a DD 250E core rig and wants to use the DCU (BU) core bit. What do you recommend? sell the DD-C-BU chuck item #232234

EM394

23) Match the nomenclature:

<u>b</u>	BI	a.	5/8" - 11
<u>c</u>	BU	b.	DCI
<u>d</u>	BS	c.	DCU
<u>a</u>	BT	d.	1/4" x 7

24) Match the following DDB 95 core bit specifications:

<u>c</u>	RC	a.	hard matrix; very abrasive material
<u>b</u>	BC	b.	medium matrix
<u>a</u>	LC	c.	soft matrix; for hard, non-abrasive material

25) In the nomenclature for grinding blades, AB-A4G-7 x 5/8-11, the material this blade is used on most effectively is stainless steel



## Drilling Proficiency

- 1) The overall drilling range of the TE5 in concrete is:
  - a. 3/16 - 5/8"
  - b. 3/16 - 1"
  - c. 3/16 - 3/8"
  - d. 3/16 - 3/4"
  
- 2) A customer needs to drill a 4" diameter hole. Which Hilti tool(s) would satisfy the customer's needs?
  - a. TE75
  - b. TE24 and TE75
  - c. TE55
  - d. TE55 and TE75
  
- 3) What is FLT TEY-KFM 28?
  - a. **Flat chisel with total length of 11" and a blade width of 3/4"**
  - b. 5/8" ground rod adapter
  - c. Scaling chisel with a total length of 19" and a blade width of 4 1/2"
  - d. Mortar chisel 1 5/16" wide and 11" long
  
- 4) A plumbing contractor is looking for a tool. From probing, you have determined that the contractor drills hole diameters from 3/8" to 1". 90% of the time the contractor drills hole diameters from 5/8" to 3/4". Which Hilti tool would give the most cost effective performance for the contractor's needs?
  - a. **TE24**
  - b. TE55
  - c. TE15
  - d. TE5
  
- 5) What is the chisel description for the TE805, which has a blade width of 4 3/4"
  - a. CHSL SCLG TE-Y-KSPM 12/50
  - b. **TE-S-SPM 12/50**
  - c. TE-S-SPM 8/36
  - d. TP-22-SPM 12-50

- 6) The TE504 and TE55 both use all the following chisels and adapters:
- TEY-KSPM 7/28, TE-Y-SPM36 and TP-19-SM36
  - TEY-KSPM 7/28, TE-Y-RD1/2 and TE-Y to TE-C
  - TEY-KSPM 7/28, TE-Y-RD3/4 and TE-Y-KSPM 12/50**
  - all of the above
- 7) A reverse switch is available on which of the following group of drills:
- TM7S VSR, TE5, TE-5A, and TE15
  - TM7S VSR, TE5, TE-24
  - TM7S VSR, TE5, TE18ME**
  - none of the above
- 8) Which of the following tools have a two level hammering power regulation feature:
- TE15, TE24, and TE55
  - TE24, TE55, and TE75
  - TE55, TE75, and TE805
  - TE55, TE75, and TE504**
- 9) A contractor needs a tool which is capable of tamping or compacting asphalt. Which Hilti TE/TP tool will accomplish this application?
- TE805
  - TE504
  - TP400
  - all of the above
- 10) The TE5 with the TE5-DRS in a plastic kit box is described as:
- TE5 DLX
  - TE5 professional**
  - TE5 STD
  - none of the above
- 11) A customer is drilling a 27/32" diameter hole. What speed setting would you recommend if the customer is using the TE24?
- first speed**
  - second speed
  - third speed
  - fourth speed

LM259A

- 12) The thickest gauge extension cord Hilti sells is \_\_\_\_\_.
- 18 gauge
  - 10 gauge**
  - 14 gauge
  - 12 gauge
- 13) Can a customer use a TE-AC angle chuck #70591 with a TE-5? yes
- 14) What drill and bit would you sell a plumbing contractor who wanted to run a 1 1/2" pipe through 6" of concrete? TE55 or TE75 combihammer drill & TE-Y GB2-23 or TE-Y BK2-11
- 15) What is the item number of the chisel that you would sell to a customer who owns a TE55 and wants to remove the mortar between bricks?  
1929
- 16) What is the top stop price for the TE5? \$95
- 17) What is the most unique feature of the TE 905 Breaker? AVR System
- 18) What is the nomenclature for the connection end of the chisels for the TE805? TE-S
- 19) Name two features and benefits of the new TEY-BK core bits.  
Centering bit locking system - long lasting retention & eliminates the loss of the cent. bit  
Tapered core bit base - permits better transmission of power to the cutting face
- 20) A customer owns several TE804's and you demo the TE805 but he balks because of the chisel being different. What do you do?  
Sell the conversion kit to convert the front end of the 804 to accept the TE5 chisles
- 21) A prospect wants to purchase a TE75 but objects because he owns numerous Bosch spline drive bits. What do you propose?  
our friction weld process

LM259A

## Anchoring Proficiency

- 1) Of the two grades of stainless steel Kwik Bolt II anchors that we sell, which would be the best that we could offer in a corrosive chemical environment?  
316 SS
- 2) A contractor needs to use a hex head sleeve anchor with a 1/2" bolt to fasten a 2x4 wood stud to a concrete block wall. What is the minimum size sleeve anchor that you would recommend? HX 5/8 x 4 1/4
- 3) An HVAC contractor has a TE5. He wants to anchor light gauge duct strap to a 4000 psi ceiling. What Hilti anchor would best suit his needs?  
metal HIT
- 4) A standard carbon steel 1/2" Kwik Bolt II has an "I" stamped on the dog point. What is the length of this anchor? 5 1/2 - up to but not including 6
- 5) In the nomenclature M24/60, the "24" means:
  - a. bolt length
  - b. drill bit diameter
  - c. **thread size**
  - d. anchor length
- 6) What drill bit is recommended when setting an HAS rod 1 x 12 with an HEA 1 x 8 1/4 capsule? TE-Y 1 1/8 x 17
- 7) 5/8" is the diameter hole needed to be drilled when setting #4 rebar with the HVA system.
- 8) Internally threaded anchors are available for both HY20 and HY150 systems.  
X True or      False
- 9) A customer is doing concrete doweling. His base material temperature is 28°F. What product do you recommend? HY150

LM259A

- 10) A customer is fastening an angle iron to a one course hollow brick wall (needs high holding values). What do you recommend and list the components of the system you recommend. (Needs to use a 3/8" diameter male anchor)  
HIT Rod 3/8 x 4 3/8, S-16 Screen, TEC+ 5/8-8, HY-20, MD-2000 (dispenser)
- 11) A customer wants to hang a pipe from a hollow core/plank ceiling. Which product would you recommend? (needs 3/8 anchor)  
HDI-P 3/8
- 12) Name 3 features and benefits of the HVU capsules v. HEA capsules?  
flexible capsules - easy use with irregular holes  
styrene-free resin - eliminates odor
- 13) A customer wants to use our HVA system. They prefer a female anchoring system that will accept a 1/2" diameter bolt. List all the components needed.  
(HEA capsule, HFA insert, TEC+ 11/16-12, square drive shaft, drive socket, HFA setting tool) OR (HVU capsule, HIS insert, TEC 7/8+ bit, square drive shaft, drive socket, HFA setting tool)
- 14) Name a unique feature and benefit of the HDI-L anchor that competitive lip drop-ins do not possess.  
2 step setting plug - allows proper setting in high strength conc.  
*easier to set*
- 15) Customer is using 1/2" diameter HAS rods. They want to embed these 6 3/8" deep. What capsule(s) do you recommend?  
1 - 1/2 x 4 1/4<sup>(4)</sup> & 1 - 3/8 x 3 1/2
- 16) The HIT HY150 and HIT HY20 can be used with the following pneumatic dispenser(s)  
a. P5000 HY  
b. P3000 F  
c. MD2000  
d. both A & B  
e. all of the above
- 17) A customer is currently buying 400 boxes of metal HITs anchors a month from you, and they are considering switching to the competition because of price. What would you do? sell master cartons

LM259A

- 18) What 1/4 HPS-1 Anchor would you select for attaching a 1/4" thick sign to concrete? HPS-1 1/4-1 5/8
- 19) A customer is doing a doweling job that needs to meet the ASTM C881-90 requirement. What product would you recommend? HSE 2411

LM259A

## Screw Fastening Proficiency

- 1) Which 3/16" Kwik Con II screw would you recommend to fasten a 2x4 to concrete when the customer wants a flush appearance? (Assume that only the minimum embedment is needed) 316 x 2 3/4 TFH or PFH
- 2) The SD45 operates up to 4300 rpm.
- 3) Select the proper screw for fastening 1/2" drywall to 14 gauge metal stud.  
6 x 1 PBH SD
- 4) An HVAC contractor is attaching 15 gauge metal strapping to 20 gauge duct. What is the minimum acceptable HWH self-drill screw he should use?
  - a. 8-18 x 1/2 HWH #2
  - b. 10-16 x 1/2 HWH #2
  - c. 10-16 x 3/4 HWH #3
- 5) The winged reamer, self-drilling screw, should be used to fasten wood to metal when the wood is 1/2" or thicker and the metal is a minimum thickness of .090.
- 6) If the amount to be drilled is 9/32 of an inch, what drill flute sizes can be used?
  - a. #2 and #3
  - b. #2, #3, #4, and #5
  - c. #3, #4, and #5
  - d. #4 and #5
- 7) What magnetic nut driver do you use to set a 10-16 x 1 HWH #3 screw?  
5/16
- 8) Your customer installs HVAC duct. They would like to use #7 zip screws. What is the complete nomenclature of that screw? 7 x 1/2 HWH Sht. Met.
- 9) If a Kwik Con II 1/4 or 3/16 screw does not have a drill bit in the box, it is all right to use a TEC+ 3/16 or 1/4 bit.      True or   X   False
- 10) When using the Kwik Con system in block, which is the correct bit to use for a 1/4" Kwik Con screw? TKB Large Block Bit

LM259A

- 11) A customer wants to screw 2x4's to one another in an exterior application - which screw would you recommend? 8 x 3 or 3 x 2 1/2 decking screw
- 12) All Hilti self-drilling screws come standard with a zinc coating.
- 13) A call at a mobile home manufacturer reveals an opportunity to sell screws for attaching 1/2 fire retardant plywood (which has a corrosive effect on most screws) to the floors of the homes. The steel framework the wood will be attached to is made from 8 gauge sheet steel. The most effective screw for this application is a Kwikflex 10-24 x 1 1/4  
- PWH #3 / 10354 (nomenclature & part #).
- 14) In what situation would you recommend a forged point screw?  
very competitive situation ; price
- 15) What is the purpose of the wafer head screw? flush, larger bearing surface & can countersink into soft materials

LM259A





- 9) CA 3400 subfloor adhesive will not freeze.  
 True or  False
- 10) FS 657 has been tested up to 4 hours in numerous applications.
- 11) CS 2130 improved formula polyurethane sealant is available as a standard item in what colors? gray, limestone, bronze, black, white
- 12) Match the proper firestop sealant with the correct application.
- |                 |   |
|-----------------|---|
| <u>D</u> FS One | a. Intumescent firestop collar  |
| <u>E</u> FS 601 | b. Simple to use firestop product for large openings through fire resistive walls & floors                |
| <u>B</u> FS 657 | c. Low cost firestop material for large complex openings in fire related construction                     |
| <u>C</u> FS 635 | d. Firestop product which protects more than 95% of all typical firestop applications                     |
| <u>A</u> CP 642 | e. A firestop sealant designed for firestopping construction joints where movement capability is required |
- 13) A mechanical contractor is penetrating a 2 hour fire rated gypsum wall with 1" steel pipe with 1" glass fiber insulation in a 4" diameter hole. Please give the following information for 100 penetrations:  
product recommendation FS One  
UL System Number WL 5029  
Tubes needed 41 tubes
- 14) In a very competitive situation, CA 3200 is the best choice for subflooring.  
 True or  False
- 15) Which graffiti removal systems would be the best choice for removing spray paint from an uncoated block wall? MC 850 (20 safe gel)

LM259A

**HILTI®**  
**STRATEGIES**  
  
**FOR SUCCESSFUL SELLING**

**Sales Skills  
Assessment**

## STRATEGIC AIMS :

- > To determine the status of your sales skills through an assessment.
- > To establish your sales skill level as compared to other salespeople.
- > To develop a plan for improving needed sales skills through an analysis of your skill levels.

## MODULE OBJECTIVES:

At the conclusion of this module, you will be able to:

- > Identify effective positive opening statements.
- > Identify needs and opportunities.
- > Distinguish between traditional vs. consultative sales.
- > Identify effective techniques for a variety of DiSC styles.
- > Identify effective methods to Handle Customer Attitudes.
- > Identify effective closing methods.

Instructions:    **Strategies for Successful Selling**  
*Skills Assessment*

This skills assessment consists of 18 scenarios dealing with all the elements of Strategies for Successful Selling I & II. There are three answers for each question; choose the answer that most closely matches the way you sell now. For each of the 18 scenarios place an "X" in the box of the answer you feel is most effective for each question.

1.    A foreman tells you that his company needs to modernize all their tools; however, they're not sure what they should buy.
- A.    Endorse the customer's remark and ask some follow-up questions.
- B.    Suggest specific options to the customer that his company might purchase. Discuss the advantages and disadvantages of each option.
- C.    Mention to the customer that Hilti has just the products and services to help them prepare for the "future," and then begin to talk about them.
2.    You and a favorite customer (an "I") have been talking for some time since you arrived at the call. You feel it's time to get down to business.
- A.    Change the topic by mentioning the new products you would like to tell him about.
- B.    Tell the customer that you're enjoying the conversation, but you're concerned about taking too much of his time.
- C.    Change the topic by telling him about a need you know his company has. Explain how Hilti has helped many others to be successful with this application. Then ask an open probe.

3. Immediately upon seeing the foreman for XYZ Mechanical, you are told that their company needs Firestop.

- A. Tell the customer that Hilti has the Firestop products to meet their needs. Then ask for the order.
- B. Support the customer's remark by probing for open and hidden needs.
- C. Ask the customer what options they've considered. Probe the applications. Suggest some possible Firestop options. Then discuss the options.

4. During a conversation, a customer tells you that he is doing business with ABC Supply because both sides know what to expect from each other.

- A. Suggest a change to Hilti. Tell the customer we will provide a similar level of service, and they will hardly notice the change.
- B. Show the customer a brochure on the DX-A40 so he can see that Hilti offers products that ABC doesn't have a clue about.
- C. Compliment him on having stable relationships with his suppliers. Probe for what he likes about ABC's products and services.

5. After a demonstration, the customer (a "D") tells you that the TE-5 is exactly what they need and have been looking for.

- A. Tell her you think that's great! Go over the P/F/B's and ask for the order.
- B. Ask if she wants the TE-5 or the TE-5 Professional. Restate the P/F/B's that support her needs, and ask for the order.
- C. Probe for any other needs. Cover them with appropriate P/F/B's.

6. Under pressure Joanne frequently checks with her supervisors before closing a sale with you. You've tried suggesting that she delegate decisions under \$1,000. to the foremen, but she doesn't want to do that. She says "My company pays me to do my job." Joanne's DiSC behavioral style is a:

- A. "Steady"
- B. "Dominant"
- C. "Conscientious"

7. At the end of a sales call, a customer tells you that the RHN-9017 and 2" stainless steel ring shank nails are just what he needs, but your price is too high!

- A. Acknowledge and probe for more information. Then provide a list of reasons why Hilti is worth more.
- B. Acknowledge the comment, then rephrase it into a positive probe. Support your view with benefits and probe for acceptance.
- C. Acknowledge the objection. Provide features and benefits that will overcome the price difference. Probe for other attitudes.

8. You walk into a drywall prospect's office for the third time. The prospect, a "D", says -" What do you want?"

- A. Briefly mention the need for getting track installed quickly. Point out Hilti's expertise in helping customers in this area. Probe for the customer's reaction.
- B. Thoroughly explain the DX-A40 and abrasive blades. Then explain how they would benefit the customer.
- C. Explain that you've intended to call on them for some time now to tell him how Hilti can help their business. Then ask what he's doing at this time.

9. To close the sale with Woody you must virtually provide a guarantee that nothing will go wrong, and your personal assurance that the decision will benefit everyone who uses the tools. This means that the solutions you provide should be clear and specific, step-by-step, with concrete guarantees. The behavioral style described is:

- A. "Conscientious"
- B. "Dominant"
- C. "Steady"

10. During a conversation with a prospect, you are told that there have been a few minor problems with their current supplier, but nothing really serious.

- A. Agree with the customer that minor problems can occur with any supplier. Then explain how Hilti keeps these problems to a minimum.
- B. Use probes to seek information regarding these problems.
- C. Tell the customer that Hilti can do better, and ask them to do business with us.

11. In an appointment, a prospect makes a comment indicating that there is doubt about doing business with Hilti.

- A. Acknowledge, then clarify the doubt. Provide specific information that addresses the doubt about doing business with Hilti.
- B. Acknowledge and probe for acceptable proof. Introduce proof and probe for acceptance by the customer.
- C. Acknowledge and probe to identify the concern. Then propose alternatives that will convince the customer to do business with Hilti.



12. You have been discussing drilling with a customer when she tells you that it seems clear that they could use something totally new.

- A. Probe for clarification of her needs, find out what they've tried already. Discuss the various options.
- B. Explain that Hilti offers not only drilling but also diamond coring to solve her application needs. Ask for the order.
- C. Endorse the customer's remark and probe for additional data.

13. After talking with a customer (an "S") for nearly an hour about grout applications, he says that he has only a few more minutes to meet with you, and he'd like to "think it over."

- A. Thank him for his time. Give the customer a product catalog and point out the page where he can find our grout. Request a meeting for a later date to continue the discussion.
- B. Thank him for his time, and probe for what the next step should be.
- C. Thank him for his time, and give him a step-by-step plan for the next meeting. Request a meeting for a later date to continue the discussion.

14. You are meeting the plumbing prospect for the first time. You want to use a general benefit statement for the positive opening.

- A. Ask if he is familiar with Hilti. Then start the discussion by familiarizing him with Hilti and your capabilities.
- B. Start up the conversation by spending some time describing the benefits of some of Hilti's key products and services.
- C. Explain how Hilti has designed a variety products to meet his needs. These products are designed to save time, labor, and money. Ask the customer to comment on his company's concerns in this area.

15. You have been discussing Kwik Bolts with a customer when he says to you that there seem to be good reasons for his company to purchase adhesive anchors.
- A. Mention that Hilti has a variety of adhesive anchors, available in several styles. Probe to uncover what options he is familiar with and discuss the features and benefits of each.
  - B. Explain to the customer that Hilti is exactly what he is looking for because you are an expert in that area. Then close the sale.
  - C. Confirm the customer's statement, and use open probes to gain more information.
16. Near the end of a sales meeting, a foreman says that everything about the DD-250E sounds good, but he's not sure it will do everything you say it will.
- A. Probe for additional information. Offer solutions to overcome the reluctance to buy now. Probe for any additional concerns.
  - B. Ratify the need for performance. Probe to uncover what proof you could offer to handle the attitude. Introduce the proof and probe for acceptance by the customer.
  - C. Probe to find out what he wants to investigate. Then address the concern by offering information that will resolve the need.
17. The purchasing agent (a "C") tells you she would want her orders to be shipped in a specific manner.
- A. Tell her that we ship all products the fastest way we can. This meets the needs of our customers. Then tell her about UPS.
  - B. Confirm her demand logical shipping performance. Clarify how she wants it. Make a proposal to handle her concerns, and after time for consideration, "Can we do business."
  - C. Tell the purchasing agent that you understand. Ask what she thinks the next step should be. Use assumed close.

18. After talking briefly to John about how the fishing trip to Canada went, you say "John, you know you gotta have the right equipment to be successful at fishing, and the same thing is true on the job here. You've told me you want to earn the bonus for early completion, the DX-A41 powder tool will help you do that." This is how you make a positive opening for a customer whose behavioral style is:

- A. "Dominant"
- B. "Steady"
- C. "Conscientious"

STOP

When instructed to do so turn to page 9, Question Weighting, for scoring. Go back through questions 1-18 and circle the number of points in the chart for each of your A, B, or C responses to the Skills Assessment.

After recording your points, enter your score for each question in the box matching the question number listed in the column labeled Sales Situations. *Example, the first Sales Situation uses scores from questions 2, 8, and 14.* Total your score to the right to determine your specific effectiveness in a skill area. *Example for DiSC: (+2) + (-2) + (-1) = (-1).* Total your score at the bottom to determine your overall effectiveness.

### Question Weighting

	A	B	C
1	+2	-1	-2
2	-2	1	+2
3	-2	-1	+2
4	-1	-2	+2
5	-2	+2	-1
6	-2	-1	+2
7	-2	+2	-1
8	+2	-1	-2
9	-1	-2	+2

	A	B	C
10	-1	+2	-2
11	-2	+2	-1
12	+2	-2	-1
13	-2	-1	+2
14	-2	-1	+2
15	+2	-2	-1
16	-1	+2	-2
17	-2	+2	-1
18	+2	-2	-1

### Effectiveness

<i>SSS Skills</i>	<i>Sales Situations</i>	<i>Score</i>
Positive Openings	2      8      14 <input type="text"/> + <input type="text"/> + <input type="text"/> =	<input type="text"/>
Identifying Needs and Opportunities	1      4      10 <input type="text"/> + <input type="text"/> + <input type="text"/> =	<input type="text"/>
Traditional vs. Consultative Sales	3      12      15 <input type="text"/> + <input type="text"/> + <input type="text"/> =	<input type="text"/>
D.I.S.C.	6      9      18 <input type="text"/> + <input type="text"/> + <input type="text"/> =	<input type="text"/>
Handling Customer Attitudes	7      11      16 <input type="text"/> + <input type="text"/> + <input type="text"/> =	<input type="text"/>
Closing	5      13      17 <input type="text"/> + <input type="text"/> + <input type="text"/> =	<input type="text"/>
Name: _____	Overall Effectiveness Score	<input type="text"/>

### Question Weightings:

There are an infinite number of ways to "get the order." The following are explanations of why certain answers were weighted as they were for that specific scenario.

1. "A" is most effective because at this point you may not know enough about the company and its needs for getting into the "future" to be accurate in recommending anything. This is an opportunity.
2. "C" is most effective because you change the conversation by talking about the customer's needs and friends, not Hilti's expertise.
3. "C" is the most consultative approach in this scenario. You're involving the customer in this sale, probing for needs & solutions. "A" is traditional.
4. "C" is most effective because, by discovering the "open" needs about the distributor, you'll also discover those "hidden" needs to probe into. A&B treat this statement as a need, when it's still an opportunity.
5. "B" is most effective because the statement is a closing signal. You then give her two options while supporting her needs with features and benefits, then made a direct close. This is how you close a "D".
6. "C" is how a Conscientious behavioral style responds to pressure.
7. "B" is most effective because this is the SSS way to handle price objections.
8. "A" is most effective because you've limited the socializing, got to the point, and focused on results. This is a positive opening for a "D".
9. "C" is most effective because it is how you gain commitment with/close an "S".
10. "B" is more effective because this is an opportunity. Both "A" and "C" treat this as a need for Hilti products/services. You need to gain more information

11. "B" is more effective because this handles skepticism in the SSS way, Both "A" & "C" guess at what it takes to handle the attitude.
12. "A" is most effective because it allows you to determine the customer's needs, not assume what they are. "B" assumes needs, "C" just isn't as specific as "A".
13. "C" is most effective because it is the recommended way to close an "S". In "A" you're assuming that he has found the meeting productive. In "B" you're giving the impression that you're indecisive.
14. "C" is most effective because a general benefit statement gives the purpose and benefits of the call for the customer.
15. "A" is most effective because goes a little further than "C" in determining if this is a need or opportunity. "B" is traditional selling.
16. "B" is most effective because it handles the customer's skepticism in the manner recommended by SSS.
17. "B" is most effective because it is logical, clear, and direct, the way you close a "C."
18. "A" is most effective because it limits socializing, gets to the point, and is related to their goal of results. This is a positive opening for a "D."

### Action Planning

Based on your analysis of your individual needs, develop an action plan on page 13 for improving your effectiveness. Put the plan in place and practice the skills until you feel comfortable with the results. Take this assessment again to judge your progress.

Hilti, Inc.  
5400 S. 122nd E. Avenue  
P.O. Box 21148  
Tulsa, Oklahoma 74121  
Phone (918) 252-6000, Telex 20-3668



---

To: **All Territory Salespeople** From: **Leo McKnight** Date: **September 5, 1997**

---

Subject: **September Regional Sales Meeting -** Ref:  
**Transfer of Learning Questionnaire**

---

Copies to:  
All RM's, DM's, VP's

As many of you might be aware we have a team in place that is analyzing our Hilti Salesforce Proficiency.

One major area of salesforce competency is product knowledge. Once you have gone through BTS almost all of your product knowledge is gained through critical Regional Sales Meetings (new product introductions ).

I am enclosing a questionnaire that will help us to understand the factors that influence learning on the job. The information we collect (with your help) will help us to create more effective Regional Sales Meetings.

Please fill out the questionnaire. Whenever the words training program are use please substitute Regional Sales Meeting and reflect on the September Regional Sales Meeting you have recently attended.

Thanks in advance for your help and feedback. Please return the questionnaire in the pre-address envelope to the Training Department. Please return by September 19th.

Regards,

A handwritten signature in black ink, appearing to read "Leo", written over the printed name.

Leo McKnight  
Director Training & Development

## *General Issues/Comments Feedback Survey*



\*Please fill out the following 16 questions. Your comments will be anonymous, so no names please

Thanks,

Leo McKnight

LM270



1) When you reflect on the training you have received from Hilti, please rate the following criteria;

	Extremely dissatisfied										Extremely satisfied
A. Well organized	1	2	3	4	5	6	7	8	9	10	
B. Innovative	1	2	3	4	5	6	7	8	9	10	
C. Clear/easy to understand	1	2	3	4	5	6	7	8	9	10	
D. Covers most important issues	1	2	3	4	5	6	7	8	9	10	
E. Responsiveness of trainer	1	2	3	4	5	6	7	8	9	10	

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2) When compared to other organization's training programs you have taken, evaluate Hilti's training offerings;

Extremely dissatisfied										Extremely satisfied
1	2	3	4	5	6	7	8	9	10	

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3) After completing SSS sales skills training, how relevant was the course material to the Hilti sales process?

Extremely irrelevant									Extremely relevant
1	2	3	4	5	6	7	8	9	10

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

4) From your position as a salesperson, what additional training programs do you feel Hilti should offer?

	Extremely irrelevant										Extremely relevant
	1	2	3	4	5	6	7	8	9	10	
A. Understanding the Construction Cycle											
B. Territory Planning & Organization											
C. Advanced Product/Application Training											
D. Segment Specific Training											
E. Other: _____											

5) How satisfied are you with the effectiveness of your regional sales meetings?

	Extremely dissatisfied										Extremely satisfied
	1	2	3	4	5	6	7	8	9	10	
A. Organization											
B. Clarity of Presentation											
C. Coverage of Key Issues											
D. Responsiveness to Voiced Concerns											
E. Frequency of Meeting											

Comments: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

6) Please rate the effectiveness of your Regional Manager;

	Extremely ineffective										Extremely effective
	1	2	3	4	5	6	7	8	9	10	

Comments: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

7) Thinking about your RM's coaching ability, how would you rate him/her in the following areas?

	Extremely ineffective										Extremely effective
A. Performance Management Process	1	2	3	4	5	6	7	8	9	10	
B. Sales Management Process	1	2	3	4	5	6	7	8	9	10	
C. Territory Planning & Organization	1	2	3	4	5	6	7	8	9	10	
D. Prospecting for New Accounts	1	2	3	4	5	6	7	8	9	10	
E. Product Knowledge	1	2	3	4	5	6	7	8	9	10	
F. Applications	1	2	3	4	5	6	7	8	9	10	
G. SSS Sales Skills	1	2	3	4	5	6	7	8	9	10	

Comments: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

8) How frequently does your RM visit your territory for a van ride? (circle one)

- Once each month      Once every six weeks      Once every two months      Once every three months      Less frequently

9) How would you rate the effectiveness of your RM during van rides in your territory?

	Extremely ineffective										Extremely effective
A. Organization	1	2	3	4	5	6	7	8	9	10	
B. Framework for Assessment	1	2	3	4	5	6	7	8	9	10	
C. Sales Coaching During Trip	1	2	3	4	5	6	7	8	9	10	
D. Product Coaching During Trip	1	2	3	4	5	6	7	8	9	10	
E. Analyzing Territory Potential	1	2	3	4	5	6	7	8	9	10	

Comments: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

10) When reflecting on new product introductions, rate the effectiveness of the introduction in terms of:

	Extremely ineffective										Extremely effective
	1	2	3	4	5	6	7	8	9	10	
A. Understanding the Product PFB's											
B. Understanding the Market & Potential Customers for the New Product											
C. Your Comfort Level in Demonstrating the New Product											
D. Your Confidence to Sell the Product											

Comments: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

11) I believe my total compensation package (base salary, bonus, commissions, promotions, prizes, etc.) is fair and competitive.

Strongly disagree										Strongly Agree
1	2	3	4	5	6	7	8	9	10	

12) I believe that the current compensation plan motivates me to sell as much as possible each quarter.

Strongly disagree										Strongly Agree
1	2	3	4	5	6	7	8	9	10	

13) My current compensation plan motivates me to sell as much product in schedule 1 of the commission schedule as possible.

Strongly disagree										Strongly Agree
1	2	3	4	5	6	7	8	9	10	



APPENDIX D  
CORRESPONDENCE

July 21, 1997

Dear Mr. McKnight,

I spoke to you last week concerning an internship at Hilti. I am a Masters graduate student at Oklahoma State University with a current GPA of 4.0/4.0. I am majoring in Human Resource Development / Training and Development. An internship, in my area of study, is a requirement for the Masters degree program followed by a thesis report based on the internship. This opportunity can be an advantage for both Hilti and myself. I would gain hands on experience while Hilti would gain an assistant to help on projects at a time when most departments are working with limited staffs. I am aware that some interns get paid, however, I am more concerned with gaining knowledge and on the job experience.

I would be interested in assisting on a Training and Development project where development, design and implementation were involved, but I am not limited to this either. The project we discussed regarding the analysis of Hilti's high and low producers in sales would be interesting. I would like to discuss this further to see if an internship opportunity exists.

My goal is to begin September 1st and continue through until December. To discuss my internship further please contact me at (\*\*\*)\*\*\*-\*\*\*\*. I will be on vacation from July 24th through August 9th, but I will be monitoring my calls, so please leave a message and I will return your call.

Thank you for your time and consideration!

Sincerely,

Bernice Allegretti

July 23, 1997

Dear Leo,

I would like to thank you for taking time to meet with me. The Salesforce Proficiency Analysis project sounds very interesting. I look forward to starting my internship with HILTI September 1st, or as soon as I receive my advisors approval.

Thank you!

Bernice Allegretti



July 23, 1997

Dr. Robert Nolan, Ph.D.  
Oklahoma State University  
213 Willard hall  
Stillwater, OK. 74078-4045

Dear Dr. Nolan,

On Tuesday, July 22, 1997 I met with Mr. Leo McKnight, Director of Training and Development, at HILTI to discuss an internship opportunity. During this meeting, Mr. Leo McKnight approved an internship for the Fall 1997 semester.

During this internship, I will be assisting HILTI's Training & Development department with their Salesforce Proficiency Analysis. The Salesforce Proficiency Analysis is a needs analysis study to determine the gap between HILTI's high and low performers in their sales force. This project will attempt to answer whether a majority of HILTI's sales force can become as productive as the top performers or at least the average performers. If not, what are the obstacles inhibiting the sales force from higher productivity. The Sales Force Proficiency Analysis will have four objectives:

1. To determine the gap between top and bottom performers within the HILTI sales force.
2. To determine the key causes of this performance gap.
3. To discover the root causes of performance variation.
4. To develop a program to improve the performance of the least successful territory salespersons.

My Masters degree program is in Human Resource Development. Within the Human Resource Development program, my area of interest lies in Training and Development. My goals for this internship are to gain additional knowledge in the Training and Development area and on the job experience. My knowledge, up to this point, in Human Resource Development is purely academic. This internship will allow me to compare academia to how Training & Development is practiced in a real practical work environment.

Sincerely,

Bernice Allegretti  
Master's Degree Student

Hilti, Inc.  
5400 South 122nd East Avenue  
P.O. Box 21148  
Tulsa, OK 74121  
(918) 252-6000




August 4, 1997

Dr. Robert Nolan, Ph.D.  
Oklahoma State University  
Dept. of OAED  
213 Willard Hall  
Stillwater, OK 74078-4045

Dear Dr. Nolan,

Bernice Allegretti has received approval to do an internship with Hilti . This has been approved by Herb Haessig our Vice President of Human Resources. She will be assisting in our Sales Force Proficiency project and I can assure you she will complete the 240 hours of work during this project. This is an exciting project for us and the timing for her to help us is excellent.

Thank You,

  
Leo McKnight

LM:lg

fm281

## VITA

Bernice C. Allegretti

Candidate for the Degree of

Master of Science

Report: THE SALESFORCE PROFICIENCY ANALYSIS (SPA): A NEEDS ANALYSIS STUDY TO DETERMINE THE PRODUCTIVITY GAP BETWEEN THE TOP AND BOTTOM PERFORMERS WITHIN A SALESFORCE.

Major Field: Occupational & Adult Education

Biographical:

### Personal Data:

Born in Chicago, Illinois, April 9, 1960, the daughter of Mario and Frances Codacco.

### Education:

Graduated from Resurrection High School, Chicago, Illinois, in May 1978; received a Bachelors of Arts with a major in Marketing and a minor in Psychology from Northeastern Illinois University in December 1982; Completed requirements for the Master of Science at Oklahoma State University in December, 1998.

### Experience:

Employed as a Marketing Research Analyst at Market Fact, from 1983 to April 1984; Lived overseas from October 1984 to June 1992 in Madagascar, Sharjah, and Gabon; Traveled extensively throughout Europe and parts of China and Australia; employed as an Independent Sales Consultant for Happythings, 1989. Presently living in Tulsa, Oklahoma

### Professional Organizations:

Member, American Society for Training and Development