



SMITHCAREY TRAINING

Commercial Skills Assessment Tool

A questionnaire based tool to assess, analyze and prioritise the commercial training and development requirements of teams and individuals

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Commercial Skills Assessment Tool

This questionnaire and tool kit has been specifically developed by SmithCarey Training to assist, commercial managers, leaders and individuals to assess the skills and competencies of both individuals and teams.

It is designed to provide a simple straight forward process to identify the key performance areas for any commercial group, including field sales, account management, business development, category or shopper marketing teams.

The tool should take no longer than 20 minutes to complete and will ascertain current performance versus that of the highest performing groups for each of 9 core commercial competencies.

By identifying the potential areas for improvement alongside the unique requirements of each individual business, you will produce a prioritised list of training and development requirements that are both urgent and important to address to raise the bar on performance.

Completing the tool will create a simple action plan to ensure training and development is kept front of mind and resourced appropriately.

The Tool Consists of 15 Statements that may or may not apply to you or your team. Simply follow the instructions on the question page and select one of four options for each statement

Rarely
Sometimes
Mostly
Always

The value and validity of the tools comes from responding to the statements in an honest and open way. To gain as much information as possible it can be helpful to ask other members of the team to complete the tool independently and compare results.

Statements

For each of the following statements, decide if that statement applies:

RARELY 0	SOMETIMES 1
MOSTLY 2	ALWAYS 3

If you answer rarely circle 0 in the scorebox

If you answer sometimes circle 1 in the scorebox

If you answer mostly circle 2 in the scorebox

If you answer always circle 3 in the scorebox

Statement 1.

I / We actively seek out to understand our customers' needs before we present our proposals.

RARELY 0	SOMETIMES 1
MOSTLY 2	ALWAYS 3

Statement 2.

... Use our resources to build insightful plans that inspire and excite our customers.

RARELY 0	SOMETIMES 1
MOSTLY 2	ALWAYS 3

Statement 3.

... Are confident when we are challenged and can respond in a professional manner to maintain relationships and make rational business decisions.

RARELY 0	SOMETIMES 1
MOSTLY 2	ALWAYS 3

Statement 4.

... Understand the legal / regulatory consequences of our communications and how our customers can use these to their commercial advantage.

RARELY 0	SOMETIMES 1
MOSTLY 2	ALWAYS 3

Statement 5.

... Understand the roles that we play in different groups/teams and work hard to achieve the best possible outcomes.

RARELY 0	SOMETIMES 1
MOSTLY 2	ALWAYS 3

Statement 6.

... Seek to obtain the maximum sustainable value from all our interactions with our customers.

RARELY 0	SOMETIMES 1
MOSTLY 2	ALWAYS 3

Statement 7.

... Listen effectively to others without imposing our values or issues on the other party.

RARELY 0	SOMETIMES 1
MOSTLY 2	ALWAYS 3

Statement 8.

... Understands the additional considerations necessary when using customers' category data and how to drive value appropriately.

RARELY 0	SOMETIMES 1
MOSTLY 2	ALWAYS 3

Statement 9.

... Handles genuine objections with confidence, and works hard to find solutions to secure agreement.

RARELY 0	SOMETIMES 1
MOSTLY 2	ALWAYS 3

Statement 10.

... Are able to reach mutually beneficial agreements with our internal customers focused on delivering sustainable profitable growth

RARELY 0	SOMETIMES 1
MOSTLY 2	ALWAYS 3

Statement 11.

... Reach agreements that meet the needs of the business, even when customers threaten use legal or regulatory barriers.

RARELY 0	SOMETIMES 1
MOSTLY 2	ALWAYS 3

Statement 12.

... Ensures agreements are confirmed by all parties and agreed actions are completed in time and in full.

RARELY 0	SOMETIMES 1
MOSTLY 2	ALWAYS 3

Statement 13.

... Uses category & consumer insight across the whole of the commercial team with agreed plans by individual on how to implement category strategies to drive results.

RARELY 0	SOMETIMES 1
MOSTLY 2	ALWAYS 3

Statement 14.

... Know and understand the companies' policies on competition law and the steps required when anomalies are spotted to remove risks.

RARELY 0	SOMETIMES 1
MOSTLY 2	ALWAYS 3

Statement 15.

... Accurately analyses financial information (P&L, Balance Sheet, and Cash Flow) to understand customers' strategies and potential opportunities.

RARELY 0	SOMETIMES 1
MOSTLY 2	ALWAYS 3

Analysing Your Results:

Now translate your answers onto the scorecard on page 7:

Step 1:

For each answer insert the value (0-3) in each the empty boxes for the corresponding question in the table below.

E.G. for Question 1 if you answered – Mostly 2 points put 2 into the empty boxes in Q1 row in columns 1,5,9.

Step 2:

Once you've filled in the results for each of the 15 questions, add up the values in each of the columns. You should now have a value of between 0 & 12 for each of the 9 columns in the total box at the bottom of the table.

Step 3:

Transfer column totals to the corresponding competencies on the radar chart.
E.G. Column 1 score to plot point 1:- Selling Skills.

Step 4:

Rank the competencies in order of importance to your organisation and complete the competency priority framework

Step 5:

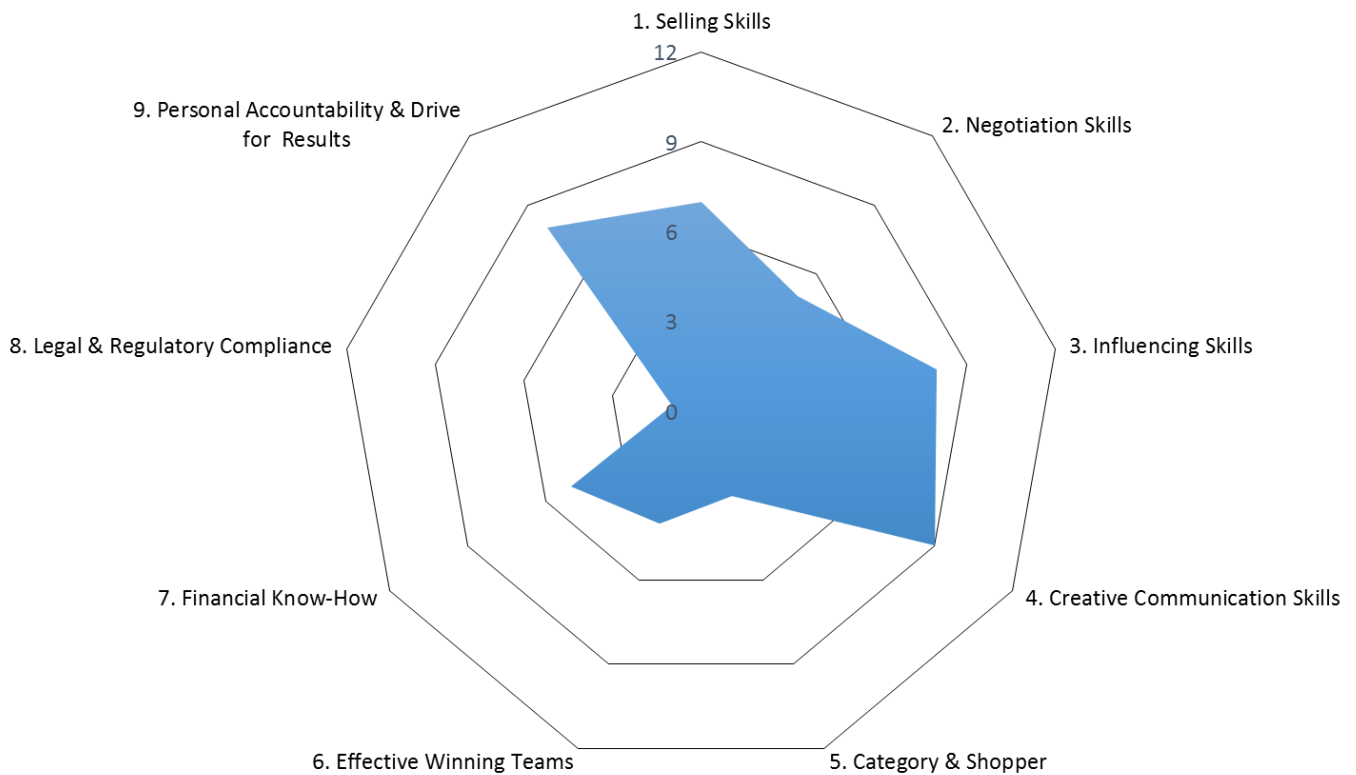
Set out your top 5 training & development priorities. Be specific and set yourself a deadline to complete your next action.

	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>	<u>8</u>	<u>9</u>
1									
2									
3									
4									
5									
6									
7									
8									
9									
10									
11									
12									
13									
14									
15									
	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL

Completing your Commercial Skills Assessment Example

Transpose your scores for each of the generic commercial competencies onto the radar chart as shown in the example below.

Commercial Skills Assessment



Having assessed your performance against each criteria you are now in a position to prioritise your training and development plan.

Rank each competency in reverse order of relevance / importance to your organisation, least relevant ranked no.1 most relevant ranked no.9.

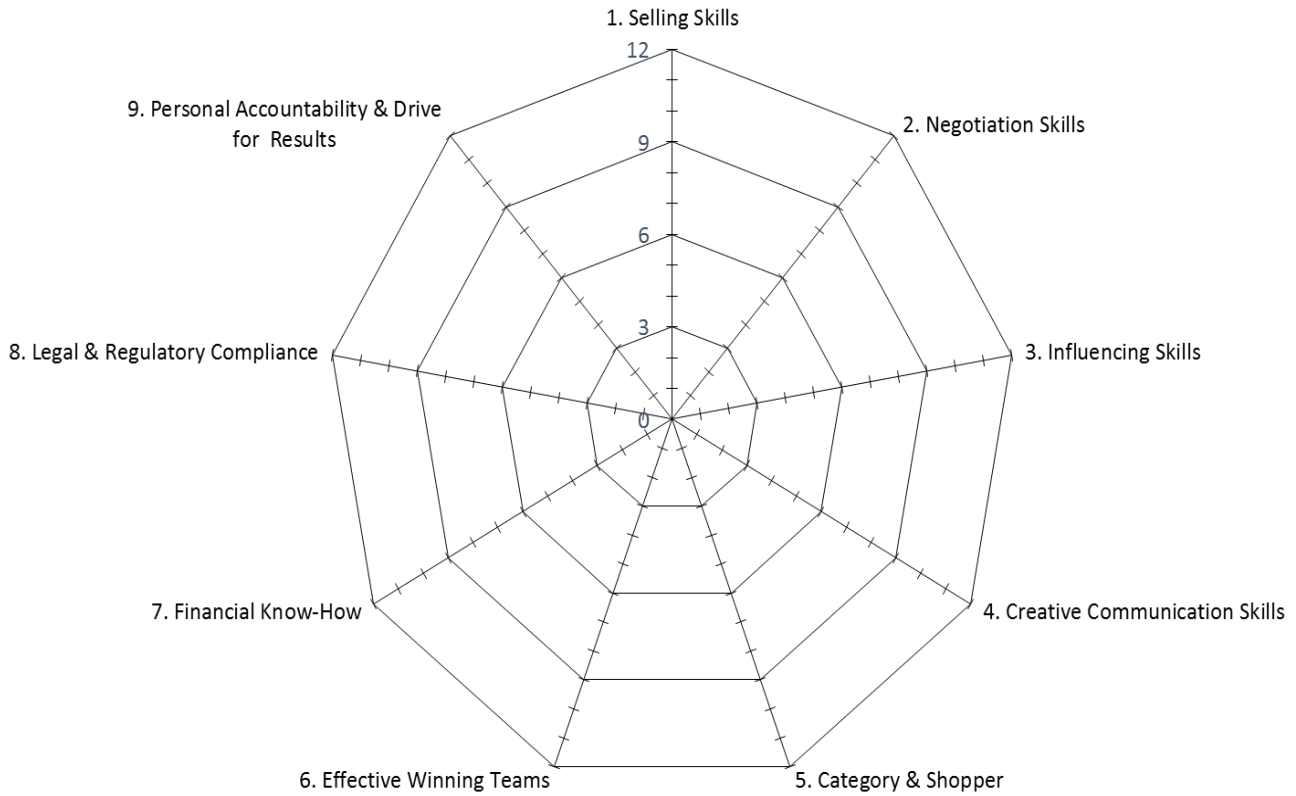
Then multiply this by the performance gap score from the assessment tool. If you scored 12, the maximum possible your gap score is 0. If scored 5 your gap score is $12 - 5 = 7$

Then Rank the answers to give a guide to your priorities (see example below.)

	Priority (P)	Assessment Score (A)	Gap Score (G) (12-A)	Total (P*G)
1.	Effective Winning Teams	5	7	7
2.	Influencing Skills	8	4	8

Assessment Template

Commercial Skills Assessment



Competency Priority Framework

Priority (P)	Assessment Score (A)	Gap Score (G) (12-A)	Total (P*G)
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1.	-----	-----	-----
2.	-----	-----	-----
3.	-----	-----	-----
4.	-----	-----	-----
5.	-----	-----	-----
6.	-----	-----	-----
7.	-----	-----	-----
8.	-----	-----	-----
9.	-----	-----	-----

Top 5 Training Priorities:

The assessment tool creates a value between 0 & 108 to act as a guide to highlight your greatest areas of training need. The higher the value the most critical that competency is to your organisation and the weaker your current performance.

Using this information as a guide identify your top 5 learning and development priorities and write down the next steps you will take to resolve these issues including a deadline to complete your next set of actions.

1.

2.

3.

4.

5.

My Actions: