

Fox Leader Lab

No Tricks, Just Results

The Loyalty Engine: Build Raving Clients Through Leadership Based Selling

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Welcome to your new attitude!

Adopting the US Marine Corps Leadership Traits: Leadership Training Course for Sales Professionals

Thanks for downloading this course!

If you're working on this course, it's because you've realized that to be even more successful, you may need to improve "something."

There are people in your company who are always in the top 5% in terms of revenue, yet seem to be doing the same volume of work that you do (or less!) on a daily basis. Even worse, many of these people might have less experience than you.

It **HURTS!** You may have even trained these high performers in the day-to-day work that you both do, yet they are outperforming you.

You can always try to blame nepotism, favoritism, an affair with the boss...but let's be honest: **YOU** are lacking that "something."

Let's fix that with leadership training. Keep reading and use the information in the course to gain your edge.

Introduction

One of the biggest challenges when it comes to learning about leadership is defining exactly what leadership means. When we think of leadership and leaders, our thoughts often go to the loud, aggressive, physical type of leaders we've been exposed to in the media or personal life. Think the screaming boss, or some swashbuckling CEO in a TV show or movie.

The true definition of leadership couldn't be further from those examples. Leadership is about helping others to get what they want and need. Your payback comes from fulfilling the other's needs. And that payback will help make you rich. Once your client has discovered a leader and partner like you, why would they take their business anywhere else?

You'll see as you work through this course that **ANYONE** can be an extremely effective leader.

There's no such thing as a "Natural Born Leader." Leaders are created through experience, and through learning the definition and traits of leadership.

Here's the truth: It boils down to **100% attitude and 0% physicality**.

You can find **AMAZING** leaders of every gender, race, body type, religion, sexual preference, and age. I was in the Marines and Corporate America, and some of the finest (and financially successful) leaders I've ever known were shorter-than-average height women!

The Foundation of the Leadership Traits in this Course

You're working on this course because you feel there's something missing in your performance. We've all been there! **The purpose of this course is to expose you to the amazing power of leadership when it's properly understood and focused.** People often have the wrong idea of what it means to be a leader. We've been misled by movies, TV, and the media. You are going to learn about real leadership, and how you can use it to explode your own income, while helping your clients and turning them into raving fans of you and your company. Why would they buy from anyone else when they have you?

After World War II, the US military needed to find a way to **EASILY** and **QUICKLY** train young recruits in leadership skills. Unlike the corporate world, the military doesn't have years to grow and season their leaders. Modern history has shown that a new recruit can be thrust into a combat situation a few weeks after graduating basic training. Therefore, there's no time to waste for the military when it comes to teaching leadership to new and inexperienced recruits.

To come up with a plan to rapidly create amazing leaders, the US Army hired Harvard Business School and other organizations after World War II to come up with a list of the common traits shared by great leaders. The researchers examined leaders from all walks of life, not only from the military. Business, education, politics and other professions were studied to create a list of common traits. The Army used the list to create their leadership program, and the Marines received a copy of the list and tweaked it for their own use. The Marines call their list the Leadership Traits, and they gave it a handy acronym that you'll learn in this guide.

I was in the Marines, so I use the Marine leadership framework because I know it best. You'll see once you dive into the course that each of the 14 Leadership Traits make total sense when applied to the sales environment. Human beings are herd animals, and we each have a built-in sensor that helps us detect good leadership. Our innate ability to sense and follow good leaders helped us to survive as early humans.

As you'll quickly see when you look at each of the 14 Leadership Traits, leadership isn't about yelling. It's not about being physically imposing. It's not about being male or female. It's about being human and having those qualities that will cause others to trust and respect you. The person who uses threats to make things happen isn't a leader, but an intimidator. The problem

for that type of person is that the intimidation wears off, and there are those who won't be intimidated. True leaders draw others to them because people can sense they're the real thing. We're going to teach **YOU** to be the real thing!

You Don't Know What You Don't Know

The reason that society is desperate for real leadership is simple: Most people can't even define leadership. As mentioned above, we've been taught through the media that leaders are loud, hyper-aggressive types. When you don't know what leadership means, how can you become an effective leader?

There are those lucky people who show leadership traits without having ever formally studied the subject. Thanks to a strong upbringing, or perhaps a religious background, they were in environments where doing the right thing was expected. The military couldn't hope to consistently find recruits who were raised that way, so they devised leadership training.

You will be exposed to some of the same basic leadership concepts that all new Marines are taught in Recruit Training (Boot Camp) and Officer Candidate School. The list of traits you'll learn have guided Marines for over 70 years, and this exact list is still used today in Bootcamp and Officer Candidate School.

Once you know the Leadership Traits, you can then infuse them into your business processes and your personal life. You'll be expected to reflect on each trait, and honestly answer to yourself where you might be weak or strong. No one is perfect in every trait, nor is anyone weak in every trait. We can all use improvement, and the trait list is meant to be reviewed with regular frequency until it becomes part of the fabric of how you do what you do!

A salesperson is like an athlete in that their performance is in black and white. For example, you either made quota or didn't. There's no hiding in sales! And because much of your income will likely be in commissions, your income can potentially be higher than that of most doctors and attorneys. This is why we've provided you with a list of Key Performance Indicators (KPIs) to track your progress as you learn to lead. The Client Survey pack we've included toward the end of the course will give your clients the opportunity to provide you with REAL feedback.

How to Use this Course

We have provided you with a list of the Leadership Traits, 2 Key Performance Indicators (KPIs) per Trait, and 4 sample surveys that can be used with certain KPIs. In the case of the surveys, I have noted in parentheses in red text when to use a particular survey next to the KPI. Your company may have surveys they use, or you can develop your own questions.

And don't forget to do the homework! This will help to solidify the idea of leadership and where you stand with each Trait. Please don't skip the homework!

Give the surveys to clients who are not your best friends, because it's necessary to get real feedback so that you can make work on problems. Someone just trying to be nice isn't going to be helpful on your journey to become the best. By the way, people are impressed with those who are trying to improve, so don't fear some negative feedback. You'll have gained their respect. We recommend using a scoring of 1 to 10, with 10 being the best score.

Examine each trait. Try and imagine how that trait can help your client see you as a leader. Do you see how you can apply it to your own processes? This can be a great opportunity for you to write out how you sell and map out your processes from prospecting to closing to maintaining and growing the relationship.

Defining and mapping YOUR own sales process is going to increase your sales income. In the Homework section, we've provided you with an example sales process that can be reliably used across most industries. Write down your process and see how each of the Traits can apply to each step in the process. Are you weak in a Trait? Fix it!

This self-examination within the framework of the Leadership Traits will be incredibly powerful because it'll force you to look at everything you do, and truly go above and beyond what your colleagues and competitors do.

You know what they do? Nothing. You're doing something huge, and this is where you get ready to launch beyond where they can realistically dream of going.

Email questions/comments to Tim (tim@foxleaderlab.com)

Meet Your New Power Buddy: The US Marine Corps Leadership Traits List

To aid in teaching the Leadership Traits to new recruits, an acronym was created. The Marine Corps emphasizes 14 key leadership traits, known by the acronym **JJ DID TIE BUCKLE**:

1. **J**ustice
2. **J**udgment
3. **D**ependability
4. **I**nitiative
5. **D**ecisiveness
6. **T**act
7. **I**ntegrity
8. **E**ndurance
9. **B**earing
10. **U**nselfishness
11. **C**ourage
12. **K**nowledge
13. **L**oyalty
14. **E**nthusiasm

As you examine the list, you'll notice that nowhere is it mentioned that you need to be a screamer, 7 feet tall, 280 pounds of solid muscle, male, female, or a certain race.

These traits are best demonstrated through performance. For example, if you promise a prospect a quote by a certain day, do you deliver the quote on time? If so, you're demonstrating the Trait of Dependability, and really, several more of the Traits.

As you examine your own process, you'll see that multiple Traits can be involved in each process. By examining how you do what you do, it'll become clearer what you can do to improve and gain more trust from your prospect or client.

Let's Explore the Leadership Traits and How You Can Use Them

Let's look at each of the Leadership Traits and explore the examples. Consider the trait and examples to see where you are with each trait. These are just examples, and you should consider your whole process and where the traits fit and might be improved in your own case.

1. Justice

- **Example 1: *Treating all Clients Equally***

It goes without saying that EVERY client you prospect and move through your funnel should be treated equally. But we do have to say it here, because there are still those who would use race, gender, national origin, and age as their guide on how to treat others. Treating everyone equally and fairly is the right thing to do, and it is smart business.

- **Example 2: *Resolving Disputes Fairly***

Imagine that two team members are in conflict over who should receive credit for a particular sale. As a leader, you would listen to both sides, gather all the facts, and then make a decision based on who actually contributed to closing the deal, rather than simply siding with the more experienced or favored team member. This ensures that justice is served, and everyone sees that fairness guides your decisions.

2. Judgment

- **Example 1: *Pursuing High-Risk Clients***

In a scenario where a large potential client shows interest but has a history of being difficult or not following through, you use your judgment to evaluate the risk versus reward. You consider factors like the client's past behavior, current market conditions, and your team's ability to handle such a client. After doing a risk analysis, you'll decide whether to pursue the close. Even if it means walking away from the deal.

- **Example 2: *Resource Allocation***

Suppose you are juggling multiple sales opportunities, but resources (time, personnel, budget) are limited. Using sound judgment, you prioritize leads based on potential revenue, likelihood of closing, and strategic importance.

3. Dependability

- **Example 1: *Delivering on Client Promises***

If you promise a client that a product will be delivered by a specific date or that certain features will be included, it's crucial to follow through. Dependability means consistently meeting these commitments, even if it requires extra effort from you or your team. This reliability builds client trust and enhances your reputation for being

someone who can be counted on. When a client realizes that you keep promises, why go elsewhere? Most people drop the ball. Hopefully, you won't.

- **Example 2: *Consistent Follow-Ups***

A dependable salesperson doesn't just close deals and move on. They maintain regular contact with clients and team members. For example, after a sale, you might schedule regular check-ins to ensure the client is satisfied and address any issues. Internally, you consistently communicate with your team, ensuring they have the support and information needed to succeed, which shows your reliability as a leader.

4. Initiative

- **Example 1: *Identifying New Market Opportunities***

At Fox Leader Lab, it's our opinion that you should always be hunting. That also goes for salespeople who are mainly in a farming role. You should be actively researching and identifying emerging markets or potential clients to grow the opportunity list. For example, if you notice a growing trend in a related industry, you might propose expanding your product offerings to meet that demand or initiate contact with companies in that space, showing your proactive approach.

- **Example 2: *Developing New Sales Strategies***

Suppose your current sales techniques aren't yielding the desired results. Rather than waiting for direction, you take the initiative to develop and test new approaches, such as investing in training or refining your pitch to address recent market changes. By doing so, you demonstrate leadership and a commitment to continuous improvement.

5. Decisiveness

- **Example 1: *Pivoting Strategies During a Sales Meeting***

Imagine you're in a sales meeting, and your initial pitch isn't resonating with the client. A decisive leader quickly assesses the situation and shifts tactics by focusing on different product features or addressing the client's concerns head-on. This ability to make quick, effective decisions can turn a potential loss into a successful sale.

- **Example 2: *Walking Away from a Deal***

Sometimes, pursuing a deal isn't in the best interest of your company, whether due to ethical concerns or unfavorable terms. A decisive salesperson recognizes when it's time to walk away, even if it's difficult. For instance, if a client insists on terms that would compromise your company's values or profitability, you make the tough call to end negotiations, protecting the long-term health of your business. It's never fun to lose business, but it has to happen on occasion.

6. Tact

- **Example 1: *Handling Client Objections***

When a client raises objections or rejects an offer, a tactful salesperson responds with understanding and professionalism. Instead of pushing back aggressively, you might acknowledge the client's concerns, offer alternative solutions, or suggest revisiting the discussion later. This approach maintains the relationship and keeps the door open for future opportunities.

- **Example 2: *Providing Constructive Feedback***

Suppose a colleague is struggling to meet their sales targets. You could address the issue privately, offering specific, constructive feedback that helps the individual improve. For example, you might say, "I've noticed that your closing rates have dipped recently. That's happened to me in the past. Let's review your recent pitches together to see where you can adjust." This shows concern for their development while preserving their dignity.

7. Integrity

- **Example 1: *Honesty with Clients***

Integrity in sales means being upfront with clients about what your product can and cannot do. If a client has unrealistic expectations, you simply explain the product's limitations, even if it means potentially losing the sale. For instance, if a client asks for a feature that isn't available, you'd rather lose the deal than promise something you can't deliver.

- **Example 2: *Accurate Sales Reporting***

Reporting accurate sales figures is crucial, even when there's pressure to meet targets. If you are falling short of your goal/quota, you resist the temptation to inflate numbers or hide weaknesses. Instead, you present the true figures and work on a plan to improve, demonstrating that you prioritize honesty over short-term gains.

8. Enthusiasm

- **Example 1: *Passionate Sales Pitches***

Enthusiasm can be infectious. When you present your product with genuine excitement and belief in its value, clients are more likely to engage and respond positively. For example, during a product demo, your energy and enthusiasm can help overcome client skepticism and generate interest, leading to a successful sale.

- **Example 2: *Motivating the Sales Team***

During tough times, such as a market downturn or after a series of rejections, a leader's enthusiasm can be a powerful motivator. By maintaining a positive attitude and rallying the team with inspiring talks or team-building activities, you help them stay focused and energized, even in challenging circumstances.

9. Bearing

- **Example 1: *Maintaining Professionalism***
Bearing involves keeping a composed and professional demeanor, especially in high-stress situations. For example, during a tense negotiation, you remain calm and collected, projecting confidence and control. This reassures the client and increases the likelihood of reaching a close that results in a win-win for everyone.
- **Example 2: *Handling Difficult Clients***
When dealing with a difficult or confrontational client, bearing means not letting their attitude affect your behavior. You respond with respect and patience, staying focused on finding a solution rather than getting drawn into an emotional conflict. This professionalism can often de-escalate the situation and get things back on track to a close.

10. Unselfishness

- **Example 1: *Sharing Leads with Teammates***
In a competitive sales environment, it can be tempting to keep valuable leads to yourself. However, unselfishness means recognizing when a teammate is better suited to handle a particular client. By passing on the lead to them, you prioritize the client's needs over your own. Hopefully, the client will come back to you down the road with needs that you can satisfy.
- **Example 2: *Mentoring New Salespeople***
Unselfish leaders invest time in mentoring less experienced team members, even if it means sacrificing some of their own selling time. For instance, you might spend an afternoon coaching a new hire on pitching techniques or accompanying them on client calls to provide feedback. It never hurts to have loyal (and thankful) colleagues!

11. Courage

- **Example 1: *Standing Up to Unethical Practices***
If you encounter unethical practices within your team or company, such as misleading clients or manipulating data, courage means speaking out, even if it puts you at risk professionally. For example, you might report unethical behavior to higher management or refuse to participate in questionable practices.
- **Example 2: *Taking Risks with New Techniques***
Courage in sales also involves being willing to try new approaches that carry risk but could lead to significant rewards. For instance, you might invest time in learning and applying a new sales methodology or technology that hasn't been widely adopted yet. Even if there's a chance it could fail, your willingness to innovate could lead to breakthrough success. Those who dare, win.

12. Knowledge

- **Example 1: *Staying Informed About Industry Trends***
A knowledgeable salesperson is always up-to-date on industry developments, competitor activities, and shifts in customer preferences. For example, you regularly read industry reports, attend webinars, and engage with thought leaders. This knowledge enables you to anticipate client needs and tailor your sales pitches to address emerging trends, positioning you as an expert in the eyes of your clients.
- **Example 2: *Continuous Learning and Development***
Sales is a field that's always evolving, and staying knowledgeable means committing to ongoing learning. Whether it's taking courses on new sales techniques, learning about new product features, or listening to podcasts, you've got to keep improving.

13. Loyalty

- **Example 1: *Advocating for Your Team***
Loyalty to your team means being their advocate within the organization. For instance, if your sales team needs better tools or more support to succeed, you take their concerns to upper management and fight for the resources they need. Your team knows you have their back, which boosts morale and fosters a strong, unified team culture.
- **Example 2: *Maintaining Client Relationships***
Loyalty also extends to your clients. Instead of seeing them as just a source of revenue, you build long-term relationships based on trust and mutual respect. For example, you might check in with clients regularly, not just when you're trying to sell them something, ensuring their needs are continually met and addressing any issues proactively.

14. Endurance

- **Example 1: *Pushing Through Long Sales Cycles***
Some deals take months or even years to close. Endurance means staying focused and motivated throughout the process, keeping up the effort even when progress is slow. For example, you might maintain regular contact with a prospect over an extended period, continuing to provide value and build the relationship until the timing is right to close the deal.
- **Example 2: *Persisting After Rejections***
Sales often involves facing rejection, and endurance means not letting these setbacks discourage you. Instead, you view each rejection as an opportunity to learn and improve. For instance, after losing a deal, you might analyze what went wrong, adjust your approach, and redouble your efforts on the next opportunity, knowing that persistence often pays off in the long run.

What Gets Measured Gets Managed

One of the challenges of leadership is the measurement of the skill. The following Key Performance Indicators (KPIs) will help you improve in each of the Traits. These KPIs are meant to be just for you, not your company or manager, unless you decide to share your results.

Several of the KPIs require the use of client surveys, and we've provided those surveys in the course material. Just look for the red text in parentheses in the KPI description.

Remember that these are **YOUR** KPIs. There's no need to share them with your managers or the company. Treating your sales job as your own business is smart, and smart businesspeople know that they need guideposts and milestones. Use these KPIs (and any KPIs you might develop) as your sales leadership GPS as you move forward to becoming a top-earning sales professional.

1. Justice

KPI 1: Client Satisfaction Rating - Measure client feedback on the fairness and impartiality of sales interactions through post-sale surveys. (See Client Satisfaction Survey in Survey section)

$$\text{Client Satisfaction Rating} = \frac{\text{Total Satisfaction Scores}}{\text{Number of Clients Surveyed}}$$

Example: If 20 clients were surveyed and the total satisfaction score was 180, the Client Satisfaction Rating would be (using a survey with 10 questions):

$$\text{Client Satisfaction Rating} = \frac{180}{20} = 9 \text{ (out of a possible high score of 10)}$$

KPI 2: Dispute Resolution Time - Track the average time it takes to resolve client disputes or objections. Your goal is to reduce the resolution time as much as possible.

$$\text{Average Dispute Resolution Time} = \frac{\text{Total Resolution Time}}{\text{Number of Disputes}}$$

Example: If 5 disputes took a total of 25 days to resolve, the Dispute Resolution Time would be:

$$\text{Average Dispute Resolution Time} = \frac{25}{5} = 5 \text{ days}$$

2. Judgment

KPI 1: Opportunity Win Rate - Evaluate the percentage of prospects that convert into customers, reflecting your judgment in selecting viable leads.

$$\text{Opportunity Win Rate} = \frac{\text{Opportunities Won}}{\text{Number of Opportunities}} \times 100$$

Example: If you won 15 out of 50 opportunities, the Opportunity Win Rate would be:

$$\text{Opportunity Win Rate} = \frac{15}{50} = .30 \times 100\% = 30\%$$

KPI 2: Decision Accuracy Rate - Track the ratio of decisions that led to positive outcomes versus those that didn't, focusing on improving accuracy over time.

$$\text{Decision Accuracy Rate} = \frac{\text{Correct Decisions}}{\text{Decisions Made}} \times 100$$

Example: If you made 18 correct decisions out of 20 decisions, the Decision Accuracy Rate would be:

$$\text{Decision Accuracy Rate} = \frac{18}{20} = .90 \times 100\% = 90\%$$

3. Dependability

KPI 1: Follow-Up Consistency - Measure the percentage of sales tasks, such as follow-ups, that are completed on or before the deadline. This will be a company or self-imposed deadline.

$$\text{Follow Up Consistency} = \frac{\text{Number of On Time Follow Ups}}{\text{Total Follow Ups}} \times 100$$

Example: If you completed 48 out of 50 follow ups on time, the Follow-up Consistency Rate would be:

$$\text{Follow Up Consistency} = \frac{48}{50} \times 100\% = 96\%$$

KPI 2: Commitment Fulfillment Rate - Track the number of commitments (promised demos, proposals, orders) that are fulfilled on time out of the total commitments made.

$$\text{Commitment Fulfillment Rate} = \frac{\text{Number of Commitments Fulfilled}}{\text{Total Commitments Made}} \times 100\%$$

Example: If you fulfilled 22 out of 25 commitments, the Commitment Fulfillment Rate would be:

$$\text{Commitment Fulfillment Rate} = \frac{22}{25} \times 100\% = 88\%$$

4. Initiative

KPI 1: New Opportunities Identified - Count the number of new sales opportunities identified through proactive efforts, such as prospecting, or selling to an existing client. You or your company will identify a period of time over which you'll track new opportunities. To keep you proactive and hunting, we recommend tracking New Opportunities Identified on a monthly basis. Adopt the mindset of the hunter, rather than the farmer.

$$\text{New Opportunities Identified} = \text{New Opportunities Identified Over a Given Period}$$

KPI 2: Proactive Client Engagements - Measure the number of times **YOU** initiate contact with individual clients, aiming for an increase over time. It doesn't count if the client contacts you. As with the New Opportunities Identified KPI, you'll set a time period to use as a guide. Tracking this KPI over a quarterly period works well, but you can use whichever period you prefer. If you're using a CRM, you should be noting each client contact, so it should be easy for you to track. If not, track client contacts in Excel or a Google Sheet.

$$\text{Proactive Client Engagements} = \text{Proactive Client Engagements Over a Given Period}$$

5. Decisiveness

KPI 1: Average Time to Close - Track the average time it takes to close a deal from the moment **YOU** feel that the customer has enough information to make a buying decision, aiming for a reduction in time while maintaining quality. The key point with this ratio is that it can help you measure your ability to close the deal once the customer has all of the necessary information they need to pull the trigger.

$$\text{Average Time to Close} = \frac{\text{Total Time to Close Deals (Days)}}{\text{Number of Deals Closed}}$$

Example: If it took 150 days to close 10 deals, the Average Time to Close Deals would be:

$$\text{Average Time to Close} = \frac{150 \text{ days}}{10} = 15 \text{ days}$$

KPI 2: Percentage of Deals Lost to Indecision – This KPI tracks the **CLIENT'S** failure to pull the trigger due to their own indecision. So why are we tracking this? Use it to track your own power of persuasion. There will be times when the client just doesn't know what to do, and that's that. You can't control that. But if you're using your leadership training and growing close to the client, you'll probably pick up clues about their indecision. That's an opportunity for you to clarify any questions/misconceptions the client might have about your offer. Aim to decrease the percentage of deals lost to client indecision.

$$\text{Percentage of Deals Lost to Indecision} = \frac{\text{Deals Lost Due to Indecision}}{\text{Total Deals Lost}} \times 100\%$$

Example: If 2 out of 10 lost deals were due to indecision, the percentage would be:

$$\text{Percentage of Deals Lost to Indecision} = \frac{2}{10} \times 100\% = 20\%$$

6. Tact

KPI 1: Client Retention Rate - Track the percentage of clients who continue doing business after difficult conversations or negotiations. Consider a difficult conversation to be one in which the client gets a little heated over a perceived issue with you, the product, or service. It happens...

$$\text{Client Retention Rate} = \frac{\text{Number of Clients Retained}}{\text{Total Number of Clients}} \times 100\%$$

Example: If you retained 45 out of 50 clients, The Client Retention Rate would be:

$$\text{Client Retention Rate} = \frac{45}{50} \times 100\% = 90\%$$

KPI 2: Resolution Satisfaction Score - Measure client satisfaction specifically after conflict resolution or difficult discussions. Your company likely uses a survey to get feedback from the client regarding their satisfaction level after a problem occurs. If not, we have provided one for you with this package. **(See Problem Resolution Survey in Survey section)**

$$\text{Resolution Satisfaction Score} = \frac{\text{Total Satisfaction Scores Post Problem Resolution}}{\text{Number of Resolutions}}$$

$$\text{Resolution Satisfaction Score} = \frac{85}{10} = 8.5 \text{ (out of 10)}$$

7. Integrity

KPI 1: Client Trust Index - Measure the level of trust clients report on you, gathered through feedback forms or surveys. **(See Client Trust Survey in Survey section)**

$$\text{Client Trust Index} = \frac{\text{Total Trust Scores}}{\text{Number of Clients Surveyed}}$$

Example: If the trust score from 30 clients totaled 270, the Client Trust Index would be:

$$\text{Client Trust Index} = \frac{270}{30} = 9 \text{ (out of 10)}$$

KPI 2: Ethical Compliance Rate - Track the number of sales made without any ethical violations, ensuring a 100% compliance rate. It goes without saying that you should **ALWAYS** be at 100% on this KPI.

$$\text{Ethical Compliance Rate} = \frac{\text{Number of Sales with No Ethical Violations}}{\text{Total Number of Sales}} \times 100\%$$

Example: If you had 50 sales with no ethical violations out of 50 sales, the Ethical Compliance Rate would be:

$$\text{Ethical Compliance Rate} = \frac{50}{50} \times 100\% = 100\%$$

8. Enthusiasm

KPI 1: Sales Presentation Engagement Score - Measure client engagement during sales presentations, assessed through feedback or interaction levels. You'll be estimating this yourself through observing the client. You might have some cold fish, but most people will show visible interest as you present and when you ask if there are any questions.

$$\text{Sales Presentation Engagement Score} = \frac{\text{Total Engagement Scores}}{\text{Number of Presentations}}$$

Example: If 5 presentations resulted in a total engagement score of 45, the Sales Presentation Engagement Score would be:

$$\text{Sales Presentation Engagement Score} = \frac{45}{5} = 9 \text{ (out of 10)}$$

KPI 2: Conversion Rate from Presentations - Track the percentage of sales presentations that convert into actual sales, aiming to increase this rate over time.

$$\text{Conversion Rate Presentations} = \frac{\text{Number of Sales from Presentations}}{\text{Total Number of Presentations}} \times 100\%$$

Example: If 7 out of 20 presentations resulted in sales, the Conversion Rate from Presentations would be:

$$\text{Conversion Rate Presentations} = \frac{7}{20} \times 100\% = 35\%$$

9. Bearing

KPI 1: Stress Management Score - Evaluate your own ability to maintain composure under pressure. Be honest! As with all of these KPIs, you can keep these scores to yourself.

$$\text{Stress Management Score} = \frac{\text{Total Stress Management Ratings}}{\text{Number of Ratings}}$$

Example: If 10 ratings resulted in a total score of 80, the Stress Management Score would be:

$$\text{Stress Management Score} = \frac{80}{10} = 8 \text{ (out of 10)}$$

KPI 2: Client Feedback on Professionalism - Track client feedback related to your professionalism during tough situations. (See Client Professionalism Survey in Survey section)

$$\text{Client Feedback on Professionalism} = \frac{\text{Total Professionalism Scores}}{\text{Number of Clients Surveyed}}$$

Example: If 20 clients gave a total score of 180, the Client Feedback on Professionalism would be:

$$\text{Client Feedback on Professionalism} = \frac{180}{20} = 9 \text{ (out of 10)}$$

10. Unselfishness

KPI 1: Client Needs Fulfillment Rate - Measure the percentage of client needs met versus the sales made, with a focus on prioritizing client satisfaction over immediate sales.

$$\text{Client Needs Fulfillment Rate} = \frac{\text{Number of Fulfilled Needs}}{\text{Total Needs Identified}} \times 100\%$$

Example: If 25 out of 30 identified clients' needs were fulfilled, the Client Needs Fulfillment Rate would be:

$$\text{Client Needs Fulfillment Rate} = \frac{25}{30} \times 100\% = 83.3\%$$

KPI 2: Client Loyalty Score - Track the loyalty of clients who perceive you as prioritizing their needs, measured through repeat business or referral rates. Most companies have a rule of thumb regarding what they consider a repeat client versus one that is only transactional. For instance, some companies will consider a client to be loyal after they have purchased 5 times or more. In your own case, pick a number that makes sense. For example, if you're a Realtor, most of your clients will not have purchased 5 houses from you. So, use a number that works for your industry.

$$\text{Client Loyalty Score} = \frac{\text{Number of Loyal Clients}}{\text{Total Clients}} \times 100\%$$

Example: If 40 out of 50 clients are considered loyal, the Client Loyalty Score would be:

$$\text{Client Loyalty Score} = \frac{40}{50} \times 100\% = 80\%$$

11. Courage

KPI 1: Number of High-Risk Deals Pursued - Track the number of high-risk or challenging deals you've pursued, aiming for an increase over time. This KPI is straightforward and is simply the number of high risk deals you're pursuing during a given time period. A high risk deal is one that comes with uncertainty, as there may be challenges to getting the deal done. Often times, these are the most lucrative deals because they are harder to close. This is industry specific, so you'll have to consider your own situation with this KPI. To paraphrase an old saying, "He/She who risks, wins!"

High Risk Deals Pursued = Number of High Risk Deals Pursued Over Given Period

Example: If you pursued 5 high risk deals in a quarter, the KPI would be:

High Risk Deals Pursued = 5 per quarter

KPI 2: Success Rate in High-Pressure Sales - Measure the success rate of deals closed in high-pressure or challenging situations, with a goal to improve this rate.

$$\text{Success in High Pressure Sales} = \frac{\text{Number of High Pressure Deals Closed}}{\text{Total Number of High Pressure Deals}} \times 100\%$$

Example: If you closed 3 out of 5 high pressure deals, the Success Rate in High Pressure Sales would be: $\text{Success in High Pressure Sales} = \frac{3}{5} \times 100\% = 60\%$

12. Knowledge

KPI 1: Product Knowledge Quiz Scores - Regularly assess your knowledge of your products and the market through quizzes or assessments and aim for continuous improvement. Does your company have formal sales training? We have found that many do not. And that's a shame, because anything that can be done, can be learned through formal training. Because you are interested in going above and beyond to be the best (you wouldn't be reading this if you weren't), we recommend that you read as much as you can about your company's products/services and think about how you can help current and potential clients. Listen to podcasts, read industry newsletters/publications, and watch videos focused on your industry and keep a close eye on your market. Your clients will begin to see you as their strategic partner, because we can almost guarantee that your colleagues and competitors aren't doing this.

$$\text{Product Knowledge Quiz Score} = \frac{\text{Total Scores from All Quizzes}}{\text{Number of Quizzes Taken}}$$

Example: If you scored 85, 90, and 95 on three quizzes, the Average Quiz Score would be:

$$\text{Product Knowledge Quiz Score} = \frac{85 + 90 + 95}{3} = 90$$

KPI 2: Client Queries Resolved Rate - Measure the percentage of client questions or concerns that you've resolved without needing to escalate to a higher authority.

$$\text{Client Queries Resolved Rate} = \frac{\text{Number of Queries Resolved}}{\text{Total Number of Queries Received}} \times 100\%$$

Example: If you resolved 28 out of 30 client queries, the Client Queries Resolved Rate would be:

$$\text{Client Queries Resolved Rate} = \frac{28}{30} \times 100\% = 93.3\%$$

13. Loyalty

KPI 1: Client Retention Rate - Track the percentage of clients retained over a specific period, aiming for high retention as a sign of loyalty.

$$\text{Client Retention Rate} = \frac{\text{Number of Clients Retained}}{\text{Total Number of Clients}} \times 100\%$$

Example: If you retained 18 out of 20 clients over a year, the Client Retention Rate would be:

$$\text{Client Retention Rate} = \frac{18}{20} \times 100\% = 90\%$$

KPI 2: Referral Rate from Loyal Clients - Measure the number of referrals generated from loyal clients, indicating their satisfaction and trust in the salesperson.

$$\text{Referral Rate from Loyal Clients} = \frac{\text{Referrals from Loyal Clients}}{\text{Total Number of Loyal Clients}} \times 100\%$$

Example: If 10 out of 40 loyal clients provided referrals, the Referral Rate would be:

$$\text{Referral Rate from Loyal Clients} = \frac{10}{40} \times 100\% = 25\%$$

14. Endurance

KPI 1: Consistency in Meeting Sales Targets - Track how consistently you meet or exceed your sales targets over time, indicating your ability to sustain effort.

$$\text{Consistency Rate} = \frac{\text{Number of Months Sales Targets Were Met}}{\text{Total Number of Months}} \times 100\%$$

Example: If you met sales targets 9 out 12 months, the Consistency Rate would be:

$$\text{Consistency Rate} = \frac{9}{12} \times 100\% = 75\%$$

KPI 2: Average Monthly Sales Performance - Measure your sales performance month-over-month, looking for sustained or improving results even during challenging periods.

$$\text{Average Monthly Sales} = \frac{\text{Total Sales Over the Period}}{\text{Number of Months}}$$

Example: If your total sales over 6 month were \$600,000, the Average Monthly Sales would be:

$$\text{Average Monthly Sales} = \frac{\$600,000}{6} = \$100,000$$

These KPIs can give you a balanced picture of where you are as a sales leader. As you move forward and really reflect on your own workflow, you can probably come up with even more KPIs. As always, be honest with tracking your KPIs.

Homework and Reflection

Week 1: Introduction to Marine Corps Leadership Traits

Welcome to your homework!

We recommend that you take 6-8 weeks to complete the work, but you're a grownup and can work as quickly as you wish.

Most of the homework is simply reflecting on your own leadership skills in each of the Traits, and thinking about how you can get better in your own process.

The key to improving your leadership skills is to be honest with yourself. Because no one is grading this work, you must be brutally honest.

Take this opportunity to really see where you are as a leader, and how you can use your developing skills to improve your sales.

Homework for Week 1

Write the Leadership Traits 10X each day of this week: One of the best ways to commit new information to memory is to write it down repeatedly. It might not have helped Bart Simpson, but it'll help you. Break out a sheet of paper and pen and just write each of the Traits. The actual word, not just the letter (You thought you were slick, didn't you?). Easy stuff.

Consider the connection between leadership and sales: You have seen several examples per Trait of how leadership qualities such as integrity, dependability, and initiative directly impact sales performance. As you've worked through this course, you've likely thought about the Traits and how they relate to what you do as a sales professional.

Start tracking leadership skills: We've included 4 Client Surveys in this course so that you can other people rate your leadership skills. Create a spreadsheet so that you can track each rating over time (Quarterly or Semi-Annually). Ask the surveyed people to be as honest as possible so that you can grow. Believe it or not, they'll respect you for trying to improve yourself.

Week 2: Justice & Judgment

JUSTICE - Fairness and Objectivity in Sales

JUDGMENT - Making Sound Decisions in Sales

Homework for Week 2:

The role of fairness in sales: Consider how fairness impacts client relationships. Ask yourself why clients and colleagues value fairness and how it contributes to long-term success. It might seem obvious and common sense, but it helps to dwell on it for a while.

Build trust through impartial decision-making: Do you make decisions that are fair and impartial, using data-driven insights or consulting with peers to avoid bias? Or do you allow preconceived notions to guide you when making business decisions?

Handle objections and conflicts with integrity: Managing objections or conflicts while maintaining fairness and transparency can make or break a sale or relationship. How do you stay honest and consistent in these more difficult interactions?

Scenario: Fair Pricing and Transparency with a Client

Background: A sales consultant, James, works for a company that provides business software solutions. The company has a tiered pricing structure based on the size of the client's business and the scope of services required. James is meeting with a potential client, a medium-sized company, to discuss a customized software package. The client has a limited budget, and James wants to secure the deal.

Situation: During the initial conversation, the client requests a breakdown of pricing options. James knows the standard pricing for a medium-sized company is higher than what the client is expecting. However, to close the deal quickly, James decides to offer the software at a lower rate than usual, without explaining the different package options or why the discount is being applied. The client happily agrees and signs the contract.

Several months later, the client learns through another contact in the industry that a similar company received additional services at the same price point they paid. Feeling that they were not given the full picture, the client reaches out to James and expresses frustration about the lack of transparency in the pricing structure. They accuse the company of unfair practices and request to renegotiate their contract.

James's manager now has to step in to address the situation. The client's trust in both James and the company has been compromised, and while the contract may not be legally violated,

the client's perception of unfair treatment could result in a loss of the relationship and potential future deals.

Reflection and Lessons Learned:

1. **Fairness and Transparency in Client Pricing:** James's decision to offer a lower price without full transparency led to the client feeling misled. Even if the deal was within company guidelines, the lack of clear communication about pricing options caused the client to distrust the company. Transparency in pricing ensures that clients feel they are receiving fair treatment, which builds long-term trust.
2. **Perceived vs. Actual Value:** The client's perception of being treated unfairly arose not from the pricing itself, but from discovering that they might have received different services or pricing if they had known all their options. It's important for salespeople to communicate the full value of their services and ensure the client understands what they are paying for.
3. **Consequences of Compromised Client Trust:** While the initial deal may have been favorable for James and his company, the long-term consequence of lost trust could result in damaged reputation and potential lost business. Rebuilding trust after a perceived unfair deal is much harder than maintaining transparency from the start.

Student Task: Reflect on James's actions and the resulting consequences. How could James have better communicated the pricing options to ensure the client felt they were treated fairly? What are the potential long-term consequences of losing a client's trust, and how could James and his manager repair the relationship? Analyze the importance of transparency in client relationships and sales success.

Application Plan: Identify a situation in your current sales process where you could apply more fairness. Create a detailed plan for how to implement fairness in that situation, including specific actions you'll take to ensure fairness throughout all your dealings.

Importance of sound judgment in sales: How does good judgment affect your decision-making in all aspects of sales, from prospecting to closing deals? Emphasize the balance between intuition and data-driven decisions.

Sales Decision Analysis: Analyze a recent sales decision you have made, breaking down what factors influenced your decision, what went well, and what could have been improved. This reflection will help you identify patterns in your decision-making process.

Decision Matrix Creation: Using a current sales opportunity, write down the pros and cons of different courses of action. This will help you practice making structured decisions based on various factors. When you list courses of action in black and white, you'll make better decisions.

Week 3: Dependability & Initiative -

DEPENDABILITY - Building a Reputation for Reliability

INITIATIVE - Taking Proactive Steps in Sales

Homework for Week 3:

Meeting deadlines and fulfilling commitments: Create strategies for managing time effectively, prioritizing tasks, and ensuring that commitments are met. Keeping promises will ALWAYS be important during your relationship with the client, but especially so during the early stages when the client is getting to know you. Choose a tool or build one that will keep you on track.

Follow-Up Tracking: For one week, track your follow-up actions with clients, noting any delays or missed opportunities. Create a plan to ensure that you won't make the same mistakes the next time. As always, be honest with yourself.

The importance of initiative in sales success: Devise a plan to be more proactive when it comes to identifying opportunities to improve your client's business by providing information or providing a solution. Your plan should push you to create a schedule where you reexamine your client's situation and consider new solutions that can aid them. Add to your calendar so that you have a block of time to do this for each client.

Remember that there's a fine line between being proactive and being pushy. How can you take initiative while remaining sensitive to client preferences and timing?

Week 4: DECISIVENESS & TACT

DECISIVENESS - Making Timely Sales Decisions

TACT - Handling Clients with Diplomacy

Homework for Week 4:

Overcoming analysis paralysis: How do you avoid over-analysis and getting stuck in the decision-making process? Research different techniques to keep you on point by setting personal deadlines and criteria for making decisions.

Create a Client Decision Timeline Creation: Clients will often drag feet when it comes to deciding on next steps. Using a current sales opportunity, create a "decision timeline" that starts when you have given the client the information they need to decide. You'll need to establish milestones and deadlines for decisions. This timeline will ensure that the deal moves forward efficiently by helping you "goose" the client along.

The role of tact in sales negotiations: Consider the importance of tact in maintaining positive relationships during negotiations. How do you navigate delicate situations without offending or alienating clients?

Communicating difficult news to clients: Build strategies for delivering bad news or managing client expectations in a way that minimizes damage to the relationship.

Managing client relationships with diplomacy: How do you handle difficult clients and maintain professionalism in all interactions? Write it down!

Difficult Message Script: Create a script for delivering a difficult message to a client such as a price increase or a delivery delay.

Grab a friend or peer and practice delivering your script. Ask the other person to provide feedback on your tone, language, and approach. Refine the script based on this feedback.

Week 5: INTEGRITY & ENTHUSIASM

INTEGRITY- Upholding Ethics in Sales

ENTHUSIASM - Inspiring Clients through Passion

Homework for Week 5:

The importance of ethics in sales: Think about some common examples of ethical dilemmas and their potential impact on your reputation if improperly handled.

Handling ethical dilemmas: Build a framework for making ethical decisions, including how to navigate situations where the right course of action might not be immediately clear. A framework such as this can help you to deal with ethical issues that pop up. And they will!

Ethical Challenge Reflection: Reflect on an ethical challenge you've faced in your sales career. Write about how you handled it, what you learned, and what you might do differently in the future.

Personal Code of Ethics: Develop a personal code of ethics for your sales practice. This code should outline your core principles and how you plan to uphold integrity in all aspects of your work.

Keeping your energy high in the face of challenges: Explore strategies for maintaining enthusiasm during tough times, such as when facing rejection or slow sales periods.

Inspiring clients with your passion for your product: Write down 5 ways to communicate your excitement about your product or service in a way that resonates with clients and drives them to take action. Put yourself in your clients' shoes and consider what they would find exciting about your offer.

Sales Pitch Video: Record a video of yourself giving a sales pitch with maximum enthusiasm. Review the video, noting areas for improvement, and consider how your enthusiasm affects your delivery and persuasiveness. Don't be shy. Invite others to view the video and rate your enthusiasm.

Week 6: BEARING & UNSELFISHNESS

BEARING - Maintaining Professionalism under Pressure

UNSELFISHNESS - Putting Clients First

Homework for Week 6:

Handling stress and maintaining composure: Go online and find techniques for managing stress, such as deep breathing, mindfulness, and preparation. There are multiple mobile apps that you can use that can help you find that “Zen” place in your own head. Create a list of 3 apps that could help you learn how to become and stay calm. Seriously consider signing up for one of the apps on your list.

Composure Reflection: Think back to a time when you maintained (or lost) your composure under pressure. It’s important to look at both scenarios (kept composure/blew composure) to really know the warning signs of when a situation threatens to make you blow a gasket. But you also need to examine those times when you were able to fight the urge to go off on someone. Analyze how you kept your composure. Work on practicing whatever you do to stay coolheaded. Jails are full of people who can’t react in any other way than badly.

The principle of unselfishness in sales: In the client’s mind, they are the only ones who have the right to feel selfish. Buying a product or service comes with risk for your client. So, they expect that you’ll do the right thing by them, without gouging/robbing/misleading them. Consider the long-term benefits of putting client needs before personal gain. Create a list of 5 examples of how unselfish actions can lead to stronger client relationships and increased loyalty. By now, you’ve come to understand that the Leadership Traits are all about long term, strategic relationships.

Client Interaction Reflection: Think about a recent sales interaction where you put the client’s needs first, even if it didn’t result in an immediate sale. Write a few paragraphs about the impact this had on the client relationship and what you learned from the experience.

Prioritization Strategy: Create a strategy for how you can consistently prioritize client needs in your sales process. This strategy should include specific actions, such as asking more questions to understand client needs better or offering solutions that are in the client’s best interest. Always remember that your actions may not result in an immediate sale, but over time you’ll have hooked that client. That will result in huge lifetime value.

Week 7 - COURAGE & KNOWLEDGE

COURAGE - Facing Sales Challenges with Confidence

KNOWLEDGE - Mastering Your Product and Market

Homework for Week 7:

Addressing fears and taking risks in sales: Identify and confront your fears, whether it's fear of rejection, failure, or uncertainty. If you're selling something, trying to persuade others, you're going to be nervous about being denied. That's a natural fear that we all have in the sales business. Research 5 strategies for taking calculated risks that can lead to breakthroughs.

Courage Reflection: Reflect on a situation where you demonstrated courage in your sales career. Analyze the outcome, what you learned, and how you can apply those lessons in the future.

Challenge Plan: Identify a current challenge in your sales process that requires courage. It could be as simple as overcoming our very human fear of cold-calling and the rejection that comes with that task. How about pursuing a big client that might be out of your range? Maybe you tend to lose your guts in a tough negotiation and end up folding and giving in to all the client's demands. Create a plan to address these fears by outlining specific steps you can take and how you might overcome any fears or obstacles.

The importance of product and market knowledge: Think seriously about how in-depth knowledge of your product and market positions you as an expert and builds client trust. Provide examples of how your knowledge can differentiate you from the competition.

Learning Plan Creation: Build a personal learning plan to deepen your knowledge of your product and market. It's even more fun if you can get a few colleagues involved and do it together. The plan should include specific goals, such as attending industry conferences, subscribing to relevant publications, or setting aside time each week for study. Create a list of 5 sales and marketing related podcasts and YouTube channels that you'll start visiting each week. If you hate reading, get over it. Subscribe to a trade magazine in your industry and read it cover to cover whenever it's published.

Week 8 - LOYALTY & ENDURANCE

LOYALTY - Building Client and Team Loyalty

ENDURANCE - Sustaining Success in Sales

Homework for Week 8:

The importance of loyalty in sales relationships: Consider how loyalty is the foundation of long-term success in sales. Loyal clients will keep funneling business to salespeople they trust and respect. Loyal clients are the ones who feed those top producers you always hear about. Not only do they provide more business from their own firm, but those clients will point you to their friends at other firms. Those superstar salespeople aren't cold-calling more clients than you. They are building loyal and raving fans! How can you foster loyalty with your current and future clients?

Demonstrating loyalty: Build a list of practical ways to demonstrate loyalty to clients, such as going the extra mile to support them or standing by them in challenging times. Every industry is different, so your list will be specific to you.

Appreciation Letter: Write a letter of appreciation to a client who has shown loyalty to you. I guarantee that your client will be shocked to receive such a letter from you! This exercise will help you practice expressing gratitude and reinforcing the bond of loyalty.

The importance of endurance in a long-term sales career: We must build mental endurance to deal with challenges, setbacks, and slow periods. Talk to a manager or mentor that you trust and ask how they've managed to keep going through difficult professional periods.

Resilience Plan: Develop a personal resilience plan, including strategies for dealing with setbacks and maintaining motivation. The plan should outline specific actions you can take to build and maintain your endurance. Again, ask advice from a more experienced colleague or friend, or Google strategies that can help you build such a plan.

FINAL PROJECTS AND COURSE REFLECTION

Create a Mission Statement: Now that you've had the chance to become familiar with the Leadership Traits, it's your chance to build a Mission Statement to help guide you as you infuse your sales process with the Traits.

A Mission Statement is a serious document.

Here's an example of a Mission Statement created by one of our students as the foundation of her sales process.

"My mission is to serve clients with integrity and dependability, building genuine relationships that provide exceptional value. I am dedicated to upholding the highest ethical standards, placing client needs above my own interests, and consistently taking the initiative to deliver proactive solutions. Through endurance and resilience, I aim to become a dependable resource, guiding clients with honesty and dedication while fostering trust. My commitment to continuous learning and adaptability ensures I remain a trusted advisor, empowering clients to make confident, successful decisions that drive long-term growth."

Integration of all 14 leadership traits: Summarize the course by reviewing how each of the 14 leadership traits can be integrated into a sales career. Discuss the importance of continuous improvement and how to keep the traits at the forefront of daily practice.

Create a Sales Process: Create a sales process that incorporates all 14 Leadership Traits. This plan should detail how you will apply each Trait in your sales process, from prospecting to retaining clients. If your company has a sales process that must follow because it's hard-wired into your CRM, then use that process and see where the Traits fit. **(Check the next page for an example of a sales process that you can use)**

Example Sales Process With Leadership Traits

Here's an example of how the Leadership Traits can come into play at each stage of a sales process. The example below is just that, an example. Your company may have a process that you must follow. For example, when I was in corporate sales, one company I worked for had a 15-step process, while the next company where I worked had only 4 steps. Because we used Salesforce.com, we had to check off the steps in sequence. But if your company doesn't have a required sales process, the plan below is very effective.

As you examine each step in the process below, you'll likely see where other Traits can be added to a particular step. Leadership is a tool that can be used in many ways, so go wild with it!

Prospecting

Sales Process Step: Identify and reach out to potential customers who may have a need for your product or service.

Leadership Traits:

Initiative – Proactively finding new leads.

Enthusiasm – Demonstrating energy and passion to motivate others and generate interest.

Courage – Fearlessly approaching new prospects, even in challenging situations.

Initial Contact / Discovery Call

Sales Process Step: Engage the prospect through a discovery call or initial meeting to learn more about their needs and challenges.

Leadership Traits:

Tact – Establishing rapport while maintaining professionalism.

Bearing – Maintaining a composed and professional demeanor during the first interaction.

Confidence – Displaying self-assurance that encourages the prospect to trust you.

Qualification

Sales Process Step: Determine whether the prospect has the need, authority, and budget to purchase.

Leadership Traits:

Judgment – Evaluating the situation and determining the viability of the lead.

Dependability – Being reliable in making accurate assessments and following through on next steps.

Integrity – Honestly assessing whether the prospect is a fit, without overpromising.

Presentation / Proposal

Sales Process Step: Deliver a customized solution to the prospect that demonstrates how your product or service solves their problem.

Leadership Traits:

Knowledge – Demonstrating expertise in the product and industry.

Decisiveness – Confidently delivering the solution and addressing key issues.

Enthusiasm – Showing passion for the solution, which can inspire confidence in the prospect.

Handling Objections

Sales Process Step: Address any concerns or objections the prospect may have regarding the product, pricing, or terms.

Leadership Traits:

Endurance – Remaining persistent in the face of pushback or difficulties.

Tact – Handling objections diplomatically and maintaining a positive relationship.

Judgment – Knowing when to push forward and when to take a step back to rethink the approach.

Closing

Sales Process Step: Secure a commitment from the prospect to move forward with the purchase.

Leadership Traits:

Decisiveness – Taking prompt action to close the deal at the right moment.

Courage – Having the boldness to ask for the commitment, even in high-stakes situations.

Confidence – Conveying certainty and assurance that encourages the prospect to move forward.

Follow-up / Implementation

Sales Process Step: Ensure the product or service is delivered and that the customer is satisfied. This step also includes follow-up to maintain a positive relationship for future sales.

Leadership Traits:

Dependability – Following through on promises and ensuring smooth implementation.

Integrity – Maintaining honesty in all post-sale interactions.

Bearing – Exhibiting professionalism in the follow-up, which reassures the customer.

Retention / Post-Sale Relationship

Sales Process Step: Focus on customer satisfaction and ongoing relationship building to encourage repeat business and referrals.

Leadership Traits:

Unselfishness – Putting the customer's needs first, even if it means going beyond the original sale.

Endurance – Continuously providing support and value over time.

Tact – Maintaining a delicate balance in nurturing the relationship without overwhelming the client.

Analysis / Continuous Improvement

Sales Process Step: Evaluate the results to refine the process and improve future outcomes.

Leadership Traits:

Integrity – Being honest about what worked and what didn't in the process.

Knowledge – Using insights to continuously improve and evolve the sales strategy.

Judgment – Making sound decisions about necessary changes based on the data and feedback gathered.

Client Surveys

Please see the following pages for 4 Client Surveys that you can use to track your growth as a leader. These surveys are linked to several of the KPIs in the KPI section. You'll see the related KPIs with the red text in parentheses.

We recommend using a Likert Scale (10 is best, 1 is worst) to have your client rate your performance.

It may feel weird to voluntarily ask to be critiqued by a client. It's not something that is usually done by salespeople. Human beings don't enjoy criticism!

However, your client will be highly impressed that you are reaching out to ask for their feedback. If you take their feedback to heart and work on your shortcomings (and we all have them!), it'll blow your clients' minds.

You'll form a bond that will be incredibly powerful. The client will feel that they've invested in YOU. Why would they go elsewhere to one of your competitors?

The answer is that they won't.

Sample Client Satisfaction Survey

Salesperson Communication

Please rate my ability to clearly and consistently communicate with you throughout the sales process, including providing updates, answering questions, and keeping you informed about the status of your order or service.

Understanding of Needs

Please rate my efforts to understand your specific business needs, challenges, and goals, and how well they aligned my offerings with these requirements.

Response Time

Please rate the promptness and efficiency with which I responded to your inquiries, requests for information, and any issues or concerns that arose during the sales process.

Product/Service Knowledge

Please rate the depth of knowledge and expertise that I demonstrated regarding the products or services I was selling, including my ability to explain features, benefits, and how they meet your needs.

Solution Tailoring

Please rate the degree to which I was able to customize or tailor the solutions offered to meet your unique business requirements, including offering personalized recommendations and alternatives.

Transparency and Honesty

Please rate my commitment to honesty and transparency in my interactions with you, including being upfront about costs, potential limitations, and the expected outcomes of the products or services.

Problem Resolution

Please rate how effectively and efficiently I handled any problems, issues, or concerns that arose during the sales process, and whether these were resolved to your satisfaction.

Professionalism

Please rate my level of professionalism through my conduct, including my demeanor, punctuality, reliability, and adherence to ethical standards throughout the sales process.

Value for Investment

Please rate your perception of the value provided by the products or services in relation to the cost, including whether you feel the investment was justified by the benefits received.

Overall Satisfaction

Please describe your overall level of satisfaction with the sales experience, taking into account all aspects of the process, from initial contact to post-sale follow-up, and how likely you are to continue doing business with my company.

Sample Problem Resolution Survey

Overall Satisfaction:

On a scale of 1 to 10, how satisfied are you with the way I handled your issue?

Understanding of the Problem:

Did I demonstrate a clear understanding of your issue?

Communication Skills:

How would you rate my communication skills throughout the resolution process?

Timeliness:

How satisfied were you with the speed at which your issue was resolved?

Professionalism:

Did I maintain a professional attitude during the interaction?

Problem Resolution:

Was your issue resolved to your satisfaction?

Follow-Up:

Did I follow up with you after the resolution to ensure everything was satisfactory?

Empathy:

Did you feel that I was empathetic and genuinely concerned about resolving your issue?

Additional Support:

Did I offer any additional resources or support to help prevent future issues?

Likelihood to Recommend:

Based on this experience, how likely are you to recommend my services to others?

Sample Client Trust Survey

Overall Trust:

Please rate your trust that I will act in your best interest.

Honesty:

Please rate my honesty and transparency in my communication with you.

Reliability:

Please rate how reliable I have been in following through on my commitments to you.

Knowledge and Expertise:

Please rate your confidence in my knowledge and expertise in the products/services I offer to you.

Communication Consistency:

Please rate if I've communicated with you consistently and kept you informed?

Conflict Resolution:

Please rate my ability to handle conflicts (if we've experienced any problems) in a way that maintains your trust.

Fairness:

Please rate my ability to be fair and equitable with you and your organization.

Confidentiality:

Please rate your confidence that I respect your confidentiality and handle sensitive information appropriately.

Alignment with Your Needs:

Please rate your perception of my understanding and alignment with your needs and goals.

Long-Term Relationship:

Please rate how likely are you to continue working with me in the future?

Sample Client Professionalism Survey

Overall Professionalism:

Please rate my overall professionalism.

Appearance and Demeanor:

Please rate how I presented myself during our contact (ex. appearance, body language, tone of voice).

Respectfulness:

Please rate how much respect I showed you during our interactions.

Punctuality:

Please rate my punctuality in meetings, calls, or other scheduled interactions.

Communication Clarity:

Please rate how clear and concise I was in my communication with you.

Responsiveness:

Please rate how quickly I responded to your inquiries or concerns.

Integrity:

Please rate my level of integrity in my dealings with you.

Problem-Solving Ability:

Please rate how effectively I handled any issues or challenges that may have occurred.

Confidentiality:

Please rate my level of respect for your privacy and handling of your confidential information.

Consistency:

Please rate how well I maintained a professional attitude throughout our interactions.

Go Forward and Make a Difference as a Leader!

Leadership is a learned skill. Don't believe the old "natural born leader" baloney.

The key to becoming a better leader is understanding **WHAT** leadership means, and how to get better in each of the leadership traits.

Take the Leadership Traits list and consider each trait and example and try to measure your strength in that trait. Be honest with yourself. Ask trusted friends or colleagues how they would rate you in each trait.

You **WILL** make more money if you improve each trait. People are naturally attracted to those who show these traits. When people consider you a leader, they will be more inclined to trust you and buy what you're selling.

And because you believe in what you sell (you do believe in your product/service, right?!?), there's no moral quandary for you when your sales increase.

Oh yeah. Once you've embraced the Leadership Traits, your **PERSONAL** relationships will improve, too. This might be the very best benefit of following the Leadership Traits. Family and friends are always more important than money. Jobs come and go, but your family and friends will be with you for life if you treat them well.

Feel free to email questions to Tim at tim@foxleaderlab.com

Endorsement Disclaimer: The use of the Leadership Traits as developed by the United States Marine Corps does not imply the Marine Corps' or the Department of Defense's endorsement of this course. The Leadership Trait list has been used in this course as an example of the components of excellent leadership. The use of the Leadership Trait list has been limited to the acronym and the word describing each trait. The Traits as they can be used in a sales context and all other course material in this Guide has been developed by Fox Leader Lab.