



## Sales Characteristics for your Selling Environment

**Understand the Sales Characteristics required to successfully recruit sales professionals for your company.**

The purpose of this guide is to help you determine the hard skills required to be successful in your selling environment. By this, we are really talking about defining the salesperson characteristics which are most relevant for your industry, audience and business.

Companies often describe the soft personality characteristics that they find to be important. This includes people who are “self-starters,” “good listeners,” “team players,” “highly motivated,” “detail oriented,” “competitive,” etc. As a result, salespeople learn to speak in these same terms in sales interviews. Unfortunately, some sales professionals may unintentionally oversell their ability which results in a bad hire and poor career choice for the sales professionals.

In this guide we are going to share insight into understanding your current selling situation so that you can build a strategic plan to recruit top sales athletes that match your sales environment and grow your company revenue. Once you have identified the important characteristics, the trick is to find sales talent that displays these characteristics as well as the degree to which the role and candidate are naturally aligned.

The below exercise is helpful to determine the hard characteristics and criteria that most accurately represent your sales environment in order to build an accurate [Interview Scorecard](#).

**Select the criteria below that best fits your sales environment.**

### Inspiration

- Value
- Volume

The “Inspiration” characteristic is defined by the things on which your sales team thrives and focuses. In summary, candidates are either inspired by Value or Volume. Which should you look for?

Salespeople inspired by **VALUE** tend to be more patient. These individuals tend to sell a more complex product or service that requires in-depth conversations and presentations driven by research and knowledge. Each prospect engagement opportunity is significant because there is a lower volume of deals, making each one measurably important. Salespeople inspired by value prefer to sell to executive level prospects or highly technical prospects and try to solve problems and create value. Value-inspired salespeople tend to be more analytical, and will demonstrate more empathy and understanding. These individuals enjoy a longer term outlook and can view each sales process as an ongoing campaign.

Salespeople inspired by **VOLUME** tend to thrive on high activity. These individuals are energized by higher levels of daily and weekly prospect engagements which translate into higher volumes of pipeline opportunities. They are comfortable creating outbound activity and thrive on momentum. Salespeople inspired by volume, multitask and function well within interrupt-driven environments. These professionals are particularly metric-driven and focus on conversions; more no's mean more yes's. Volume inspired sales professionals prefer shorter sales cycles which typically translates to lower contract values. They are comfortable getting plenty of no's because they know there are plenty more yes's to go after and the interval between each is shorter, which provides measurable results and validation, often in real-time.

## Sale Type

- Strategic**
- Transactional**

The "Sale Type" characteristic is defined by degree of sales process complexity in terms of buyers influences, process duration, decision process, resource investment, collaboration, and contract value. Sales types are either Strategic or Transactional and sales people typically fit best with one or the other.

**STRATEGIC** sales processes are complex and longer in nature. These sales processes involve communicating with and enlisting multiple buyer influences. In less complex sales, these buyer influences can be a single person such as a small business owner. In more complex sales processes, these buyer influences can be distributed across three or more people including groups and committees. Strategic sales people must make careful decisions about the buyer influences with whom they communicate, the order in which they communicate with them, and timing and tactics around enlisting other stakeholders so as to build the broadest and strongest base of knowledge and support for an eventual positive decision outcome.

Each strategic sales process brings opportunities for internal communication and collaboration with the sales team as different tactics and resources are aligned with different buyer influences. Strategic salespeople often also need to negotiate for resources and to make prudent decisions about when and where to deploy these valuable resources. For instance, in enterprise software sales processes, a sales engineer and/or subject matter expert might be leveraged during the discovery/definition stages and also during the solution presentation stages while different executives might be enlisted in later stages of the sales process based on their backgrounds and expertise.

Strategic salespeople have the patience and desire to organize and lead resources, to navigate prospect organizational complexities over periods of many months to a year and more. There are fewer wins and fewer losses, and each is significant given the investment throughout the process.

**TRANSACTIONAL** sales processes are less complex and shorter in nature. There is less strategy and more emphasis on tactics. The range of activity and behavior within transactional sales processes are faster and more immediately measurable. This also means that transactional salesforces are more metric-driven since revenue outcomes can be more directly attributed to activity and conversion (number of calls to connections, connections to meetings, proposals to deals, etc.).

Transactional sales professionals have the ability and desire to maintain a high level of measurable activity at all times. They are involved in more sales processes, each shorter in duration and each involving a small number of buyers, perhaps one or two. They are energized by a higher volume of wins that are smaller in

contract value with shorter intervals of time between wins. This can be measured in weeks, days or even hours. Therefore, they are quick on their feet and can make quick decisions.

Former athletes often make great transactional sales professionals because of the persistent, consistent activity metrics and milestones associated with setting and reaching significant athletic achievement; along with the fierce competitive nature and intrinsic motivation that accomplished athletes possess.

Understanding the type of sales process for which you are hiring makes all the difference in the world. Hiring an accomplished Strategic sales person for a Transactional type of sale is a recipe for disaster; these individuals are not wired this way. They will become frustrated with what seems like an arbitrary decision process that is more driven on numbers and personalities than tactics and strategies. Similarly, hiring a Transactional sales person for a Strategic sales process will end badly because they are just not wired for what can seem like a slow, boring, frustrating sales process that is dictated by far too many variables and decision makers.

## Degree of Need

- Recognized**
- Unrecognized**

The “Degree of Need” characteristic is defined by the degree to which your buyer(s) recognize the need for your product, service or solution prior to actively engaging with your sales representative. Degree of need can be characterized as “Recognized” or “Unrecognized”.

Sales processes based on a **RECOGNIZED** need are those in which the buyer does not need to be educated about the problem and/or opportunity for improvement or the fact that solutions exist relative to this need. Buyers will have a varying level of interest in spending on the problem or opportunity for improvement; however, the selling is less about why spend and more about why spend with you?

Salespeople selling to a recognized need therefore concentrate their selling on reaching the right buyers at the right time and focus the communication on “why us?” and to a lesser extent “why now?” The buyer is likely already aware of other providers and has preconceived ideas about the choices within the marketplace. The ability to develop rapport and credibility and to stand out in the crowd are of paramount importance. Salespeople who are more comfortable selling to a “Recognized need” probably align more closely with the “Volume” sales characteristic.

Sales processes based on an **UNRECOGNIZED** need are those in which the buyer must first be made aware that a solution or opportunity for improvement exists. Ingenuity and innovation produce new technologies and applications, materials, and techniques which create value in the economy. They also create the opportunity for companies to rethink existing ways of doing things. New behaviors spur new commercial solutions that also drive evolution and progress within traditional domains; the [Treeline Talent Tracking System](#) is one of many examples of this.

Initiating the sales process is more challenging because the buyer has not allocated the time and resources necessary to acquire such a solution. Salespeople who are comfortable selling to an unrecognized need possess a slightly higher level of empathy than those selling to a recognized need; although this level of empathy is not so high as to encumber the salesperson’s ability and desire to hunt for, and close, new business.

## Sales Approach

- Hunter**
- Farmer**

The “Sales Approach” characteristic is defined by the degree to which your sales representatives are calling on prospects with which your company is not already doing business. Sales approach is most commonly characterized as “Hunter” or “Farmer”.

Sales **HUNTERS** enjoy the pursuit for net new customers. Hunters must engage new prospects uniquely in terms of personality, background, experience, perceptions and expectations. Hunters enjoy the variability and welcome the chance to meet and encounter new prospects knowing that both positive and negative outcomes will occur. They are driven to have more conversations while increasing conversion rates along the way and have a sense of urgency and understand the power of now.

Hunters have the ability to manage and affect their attitude and to leverage the power of belief, energy, and enthusiasm; they pursue, they improvise, they learn, they overcome. Hunters remain focused on the desired outcome at all times and they develop credibility and rapport to the point necessary to close the sales process, at which point they are entirely comfortable asking for the order.

Sales **FARMERS** enjoy creating and sustaining accounts and long-term commercial relationships. Empathy is inherent in the farmer process; particularly with respect to the “what’s working and what’s not working” conversation that commonly occurs. Farmers are typically working with current or previous customers, they must align their approach and strategy with actual history especially in terms of customer expectations and perceptions.

Farmers often begin relationships with legacy customers or strategic accounts by solving problems or finding remedies for conditions which have, or are, harming the relationship. As a result, credibility is garnered and perceived value is accumulated. Farmers leverage this goodwill when seeking to renew contracts or “upselling” new products and services or cross selling to other lines of business within the company. Farmers are often measured by renewal revenue, upsell and cross sell revenue, and can sometimes be held to retention ratios and customer satisfaction metrics.

## Drive

- Assertive**
- Passive**

The “Drive” characteristic is defined by the degree to which your sales representatives will advocate, evangelize, and enlist prospects in the value of his/her ideas, perspectives, and proposals. Drive is sometimes characterized as “Assertive” or “Passive”.

The term **ASSERTIVE** is intentionally used rather than “aggressive” or “type-A”. Assertive is used to convey a level of self-confidence, presence, credibility, and desire to advocate, evangelize, and enlist. Selling is a human endeavor; and every human has an ego. Having the confidence to break down barriers by sharing your belief and passion while displaying credibility are all pertinent attributes for this characteristic.

**PASSIVE** sales professionals are not entirely unable or uninterested in advocating, evangelizing, and enlisting. These sales professionals are more comfortable driving results through consistent effort, higher levels of activity, rapport and relationship, and articulating value. Passive sales professionals often sell within the process of account management, customer service, and translating earned goodwill into retention and upselling.

## **Audience**

- General Decision Maker**
- C-Level Executive(s)** (CEO, CIO, CFO, CTO, CRO, etc.)

The “Audience” characteristic is defined by the organizational level at which your sales force is selling. Audience is commonly characterized as “General Decision Maker” versus “C-Level Decision Makers”.

**GENERAL DECISION MAKERS** occupy a broad range of employees and small business owners across functional areas. These employees have sufficient discretionary authority to make buying decisions but they do not possess CXO or VP titles. Employees at this level are more accessible and typically can make buying decisions to a certain dollar value. While larger orders require cross-functional communication and senior level approval processes, vendor communication occurs at the general manager and decision maker level.

Communication at this level is more comfortable, informal, and direct. Salespeople who tend to leverage relationships and rapport excel here because their natural talent creates differentiation early in the sales process. Relationships are forged directly with key players in the sales processes so these deals tend to be more transactional than strategic.

**C-LEVEL** decision maker titles may vary largely depending on the size of company and industry. These CXOs, VPs, Directors, and Senior Managers are involved in the evaluation and purchase of certain products and services. Typically these purchases are more strategic in nature and reflect Board, CEO, or committee inspired initiatives and/or they reach pre-determined spending thresholds that warrant greater scrutiny. Certain sales processes culminate at the C-level, others begin there and require gaining executive support prior to engaging other mid-level managers and stakeholders.

These buyers are more seasoned and can be intimidating to many salespeople. Some salespeople welcome the consultative and often more strategic approach required to create and sustain credibility with this audience, others are simply not comfortable. Beyond approach, the language and communication with this audience is often more formal and deliberate.

## **Selling Environment** (Defined by the sales position.)

- Inside Sales**
- Outside Field Sales**

The “Selling Environment” is defined by the degree to which your sales team has the greatest ability to close business, which may come from either an “Inside Sales” or “Field Sales” model.

**INSIDE SALES** can occur from remote home offices, hybrid mix or from within a corporate office environment. Promoting and sustaining a high-output sales culture is more difficult with a remote workforce. The majority of inside sales positions require less experienced talent and as a result this demographic does better onsite. At least through the ramp up stage. An onsite environment promotes healthy in-person training,

mentoring, positive affirmation and camaraderie. Maturity and experience level factor into the sustainability of your environment. As a result it is your decision, based on the experience level of your team and their ability to produce at an optimal level, if they can effectively work in an in office, hybrid or remote environment.

Inside sales professionals sell almost exclusively through phone, email and video meetings and must be proficient in leveraging tools such as Zoom, Teams, Slack, Skype, Outreach and other platforms to engage and connect with prospects and clients. Inside sales professionals are able to successfully close business by leveraging these tools and without ever meeting a prospect in person.

Due to shifting work cultures, many organizations have found that inside selling is extremely effective from a cost and time perspective and that their sales representatives are just as successful, if not more successful. Regardless of location, a properly configured and cloud-based sales force automation tool, such as Salesforce.com, is critical. For hybrid and remote team members, effective intranets and content management systems that provide access to sales and marketing materials are also critical tools for success. You will have a greater chance of recruiting top talent and retaining them for a longer period of time if your team works in a remote or even hybrid environment.

**OUTSIDE FIELD SALES** professionals tend to spend a considerable amount of time traveling to visit prospects throughout the sales process. Outside sales professionals have a fair degree of autonomy and discretion particularly in terms of time management. They must be able to use time wisely and to make things happen on the go. “The office” changes daily; it’s a hotel room, airport lounge or terminal, rental car, and restaurant and these sales reps need to be comfortable with a changing work environment and many outside distractions.

Beyond the pragmatic aspects of time management and travel, outside salespeople also need to be good at the most important part: prospect engagement and face to face selling. Engaging prospects and customers involves giving presentations and meeting with individuals and groups. Some meetings are formal where you will be presenting in front of a room of individuals and C-suite executives, while others are more informal and potentially social in nature, such as a lunch or conversation at a conference. Outside salespeople know their industry, their solution, and the audience with whom they are engaging. They are confident and exude credibility. They have energy and display a strong presence.

The challenges and thrills of outside sales are not for every salesperson. The variables, uncertainties, and rigors of travel are foreign and undesired by many – which is perfectly okay! Salespeople need to know their comfort level and capabilities, while hiring managers need to understand which style selling is best for their environment. This type of sales professional thrives in a fully remote or hybrid environment.

### **Average Sales Size** (Defined by the typical value of each contract closed.)

**What is the average sales size? \$\_\_\_\_\_**

The “Average Sales Size” is defined by the average value of your closed sales over a 12 month period. It is important to understand your average sales size because it helps to confirm or contradict the other characteristics in this exercise. For example, the smaller the sales size the more transactional the sale and the larger the sales size the more strategic skill set is required. If you require both then it may be necessary to bifurcate your sales model in order to hire the right talent. See the examples below.

- **\$5,000 - \$30,000**
- **\$30,000 - \$60,000**

- **\$60,000 - \$100,000**
- **\$100,000 - \$200,000**
- **\$200,000 - \$500,000**
- **\$500,000 - \$1,000,000**
- **1,000,000 - \$3,000,000**
- **\$3,000,000 - more**

## **Sales Cycle**

- Short (less than 6 months)**
- Long (more than 6 months)**

The “Sales Cycle” characteristic is defined by the average sales process duration from the point of active engagement. Active engagement is the point at which the buyer recognizes the need and has decided to engage in a buying process; therefore, the early marketing, prospecting and enlistment phases of the process occur prior to active engagement. It is at this point that the opportunity typically enters the forecast. Sales cycles are generally characterized as “Short” versus “Long”. See the chart below.

One call close - 1 month	Short
1 month - 3 months	Short
3 months - 6 months	Short
6 months - 9 months	Long
9 months - 12 months	Long
12 months - 18 plus months	Long

## **Quota (Quantifiable Accountability for Revenue Closed)**

- What is the quota? \$ \_\_\_\_\_**

The “Quota” characteristic is defined by the degree to which the salesperson has attained and achieved the quota associated with the role. These are the measures and metrics on which variable compensation is predicated. It is important to define the quota in order to confirm and match selling ability to a specific audience. For example, the smaller the quota the more general the audience and the larger the quota the more seasoned C-Level executives are involved. See the examples below.

- **\$600,000**
- **\$750,000**
- **\$1,000,000**
- **\$1,200,000**
- **\$1,500,000**
- **\$2,000,000**
- **\$2,500,000**
- **\$3,000,000 +**

By completing this exercise you now have the ability to build a better sales team that is more aligned with your selling environment. Based on your understanding of the characteristics required to sell successfully at your company you can focus on revising your Interview Scorecard to identify the perfect fit for your company.

Treeline offers a variety of sales recruiting services that align to your sales environment. If you are looking for a turn key solution to find elite sales talent that match the characteristics you have defined above contact one of our consultants at 781-327-8910. Follow this link to our [Treeline Resume](#) to see how we display these sales characteristics for each of our candidates to ensure we are finding the right fit for your selling environment. You may also find our [Compensation Calculator](#) useful as you recruit to fill your open sales positions.