

Leader's Version

Terms and Definitions

5 levels of leadership:

1. Position – I have a title and that's why they follow me
2. Permission – I have a relationship and they choose to follow me
3. Production – I have increased their production and that's why they follow me
4. People development – I have made them a better person/employee that's why they follow me
5. Pinnacle – I have developed them to be a leader and that's why they follow me

4 skills of sales professionals:

- Salesmanship – ability to address questions and concerns, handle objections and close the sale
- Communication – ability to adapt to the personality, culture, or style of any customer
- Mindset – ability to stay focused, organized, motivated and maintains goals with a good attitude
- Marketing – ability to separate themselves in the market, promote themselves and get referrals

5 phases of life focus:

1. Physiological – food, shelter, paying bills, transportation
2. Psychological – protection, security, stability, savings, peace or mind
3. Relational – affection, love, belongingness, happiness at home
4. Personal – self-esteem, freedom, prestige, confidence
5. Peak experiential – self-fulfillment, personal growth, optimizing potential

6 core needs:

- Certainty – they need structure, consistency, organization and clear expectations
- Variety – they need change, creativity, freedom, and like uncertainty
- Community – they need to feel like they are part of something bigger, a team and group
- Significance – they need to feel separate, special, like attention, and want to receive praise
- Contribution – they need to give, share, teach, and coach others
- Growth – they need to improve, grow, and want to see an opportunity for advancement

5 languages of appreciation:

- Words of encouragement – constant praise; both public and private declarations of value
- Quality time – spending time one on one; in and out of work situations
- Tangible gifts – token gestures; ranging from tickets, to trophies to a can of Red Bull
- Acts of service – assisting with a project, assignment or completion of tasks
- Touch – acknowledgement through high fives, hand-shakes, and pats on the back

Team member's version

Terms and Definitions

5 levels of leadership (in order of lowest to highest level of influence)

1. Position – They have a title and that's why I follow them
2. Permission – They have a relationship with me and that's why I choose to follow them
3. Production – They have increased my production and that's why I follow them
4. People development – They have made me a better person/employee that's I follow them
5. Pinnacle – They have developed me to be a leader and that's I follow them

4 skills of sales professionals (in no particular order)

- Salesmanship – ability to address questions and concerns, handle objections and close the sale
- Communication – ability to adapt to the personality, culture, or style of any customer
- Mindset – ability to stay focused, organized, motivated and maintains goals with a good attitude
- Marketing – ability to separate myself in the market, promote myself and generate referrals

5 phases of life focus (in order of lowest to highest level of importance)

1. Physiological – food, shelter, paying bills, transportation
2. Psychological – protection, security, stability, savings, peace or mind
3. Relational – affection, love, belongingness, happiness at home
4. Personal – self-esteem, freedom, prestige, confidence
5. Peak experiential – self-fulfillment, personal growth, optimizing potential

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- Growth – they need to improve, grow, and want to see an opportunity for advancement

5 languages of appreciation (in no particular order)

- Words of encouragement – constant praise; both public and private declarations of value
- Quality time – spending time one on one; in and out of work situations
- Tangible gifts – token gestures; ranging from tickets, to trophies to a can of Red Bull
- Acts of service – assisting with a project, assignment or completion of tasks
- Touch – acknowledgement through high fives, hand-shakes, and pats on the back

Leader's Version

Name: _____ Years of experience: _____ Time with company: _____

1. Current level of leadership I have with **this** team member: _____ (pick a number 1-5)
2. Their #1 dominant skill: _____ (pick their strongest skill from the list)
3. Their 2nd best developed: _____ (pick their 2nd strongest skill from the list)
4. Primary phase of focus: _____ (select the phase they are most focused on)
5. Their top 2 core needs: _____ & _____ (select 2 of the 6)
6. Their top 2 languages of appreciation: _____ & _____ (select 2 of the 5)
7. Last year's average income: \$ _____ / month average & \$ _____ / total last year
8. Highest ever earned income: \$ _____ / in a month, \$ _____ / in a year (ever)
9. Minimum income to meet their basic bills: \$ _____ / month (to cover their lifestyle)
10. Income goal range for the year: Minimum desired \$ _____ up to \$ _____
11. Primary wish/goal for this year to achieve/accomplish/acquire: _____

Process, Performance, Personality, Production & Profitability Rating

1. On a scale of 1 – 10 how well do they understand and follow the sales process: _____
 2. On a scale of 1 – 10 how well do they perform the daily tasks required of them: _____
 3. On a scale of 1 – 10 how well does their personality contribute to the culture: _____
 4. On a scale of 1 – 10 how well does their production contribute to the store: _____
 5. On a scale of 1 – 10 how well do they maximize the profitability of the sale: _____
 6. On a scale of 1 – 10 how well do they communicate the value of the product: _____
 7. On a scale of 1 – 10 how well do they maximize their base thru repeat/referrals: _____
 8. On a scale of 1 – 10 how well do they perform outside prospecting and marketing: _____
 9. On a scale of 1 – 10 how well do they follow up with sold and unsold customers: _____
 10. On a scale of 1 – 10 how well do they handle incoming phone and/or internet leads: _____
- Total the score of each category and create an action plan based on the total score:** _____

86+ = look for ways to promote
71-85 = look for ways to encourage
61-70 = provide more training
51-60 = provide accountability
50 or = less consider replacing

Team member's version

Name: _____ Years of experience: _____ Time with company: _____

1. Current level of leadership I have with **this** member of management: _____ (pick a number 1-5)
2. My #1 dominant skill: _____ (pick my strongest skill from the list)
3. My 2nd best developed: _____ (pick my 2nd strongest skill from the list)
4. Primary phase of focus: _____ (select the phase I am most focused on)
5. My top 2 core needs: _____ & _____ (select 2 of the 6)
6. My top 2 languages of appreciation: _____ & _____ (select 2 of the 5)
7. Last year's average income: \$ _____ / month average & \$ _____ / total last year
8. Highest I have ever earned income: \$ _____ / in a month, \$ _____ / in a year (ever)
9. Minimum income to meet my basic bills: \$ _____ / month (to cover my lifestyle)
10. Income goal range for the year: Minimum desired \$ _____ up to \$ _____
11. Primary wish/goal for this year to achieve/accomplish/acquire: _____

Process, Performance, Personality, Production & Profitability Rating

1. On a scale of 1 – 10 how well do I understand and follow the sales process: _____
2. On a scale of 1 – 10 how well do I perform the daily tasks required of me: _____
3. On a scale of 1 – 10 how well does my personality contribute to the culture: _____
4. On a scale of 1 – 10 how well does my production contribute to the store: _____
5. On a scale of 1 – 10 how well do I maximize the profitability of the sale: _____
6. On a scale of 1 – 10 how well do I communicate the value of the product: _____
7. On a scale of 1 – 10 how well do I maximize my customer base thru repeat/referrals: _____
8. On a scale of 1 – 10 how well do I perform outside prospecting and marketing: _____
9. On a scale of 1 – 10 how well do I follow up with sold and unsold customers: _____
10. On a scale of 1 – 10 how well do I handle incoming phone and/or internet leads: _____

Total the score of each category and create an action plan based on the total score: _____

86+ = look for opportunities for advancement

71-85 = look for ways to get encouragement

61-70 = ask for more training

51-60 = start getting more accountability

50 or less = look for a new opportunity

Leader's Version

Action plan and Goal setting / tracking

Name: _____ Date: ____/____/____ Leader: _____

Area of opportunity: _____

Specific goal: _____

Why this goal is important to them: _____

Who is directly involved: 1: _____ 2: _____

3: _____ 4: _____

Indirectly involved: 1: _____ 2: _____

3: _____ 4: _____

When will they accomplish the phases by:

1: _____ by ____/____/____

2: _____ by ____/____/____

3: _____ by ____/____/____

4: _____ by ____/____/____

How will they accomplish this goal:

Signed by: _____ - Leader

Signed by: _____ - Salesperson

Team member's version

Action plan and Goal setting / tracking

Name: _____ Date: ____/____/____ Leader: _____

Area of opportunity: _____

Specific goal: _____

Why this goal is important to me: _____

Who is directly involved: 1: _____ 2: _____

3: _____ 4: _____

Indirectly involved: 1: _____ 2: _____

3: _____ 4: _____

When will I accomplish the phases by:

1: _____ by ____/____/____

2: _____ by ____/____/____

3: _____ by ____/____/____

4: _____ by ____/____/____

How will I accomplish this goal:

Signed by: _____ - Leader

Signed by: _____ - Salesperson