

# **HIRING INTERVIEW TOOLKIT**

## **SALES POSITION**

*Everything you need to conduct  
a complete, professional and  
thorough sales interview*



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**BRIAN JEFFREY**

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# **HIRING INTERVIEW TOOLKIT SALES POSITION**

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*Hiring Interview Toolkit — Sales Position  
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## Overview

The interview is a critical part of the hiring process for a sales position. Chances are that if this part of the process is done poorly, you may end up hiring a dud, someone who not only can't sell and make money for you and your company but who will end up costing the company money in lost opportunities that a good salesperson could have closed.

This *Hiring Interview Toolkit* is designed to give you all the interview tools you need to conduct a complete, professional, and thorough sales interview.

In addition to providing the questions to ask, in most cases we'll tell you what you should be looking for in the answer. We'll also explain the rationale behind each step of the process in the toolkit.

Expect to be somewhat awkward the first few times you go through the process. With each new interview, you'll get to learn what answers to expect and how to deal effectively with the mini competency quiz and sales simulation.

### The Seven-Step Sales Interview Process

There are seven steps to our sales interview process:

- Step 1: Telephone Pre-Qualification Interview
- Step 2: Sales Temperament Assessment
- Step 3: Initial Face-to-Face Interview – General Questions
- Step 4: Second Face- to-Face Interview – Sales-Based Questions
- Step 5: Mini Competency Quiz
- Step 6: Simulated Sales Call
- Step 7: Subjective Assessment – Other Considerations

Forms and instructions for the seven steps are enclosed. In addition, on page five a *Hiring Interview Summary Sheet* is provided as a convenient place for you to record the progress of a candidate's interview.

We recommend that you take a few moments to read the instructions that precede each step in order to familiarize yourself with the process before embarking on your first interview.

### Selecting the Best Candidate

This *Hiring Interview Toolkit* allows you to very effectively interview and evaluate sales candidates. If you go through our seven-step process with several candidates, you will hopefully end up with more than one acceptable candidate. Then the question will be, Which one do I hire?

As all of the candidates will have passed through a very thorough screening process, you have a number of methods for selecting the best person:

- The first, and simplest, is to hire the person you liked the best, the one that your intuition tells you is the best choice.
- A second, and equally efficient method, is to choose the person who scored the highest overall.
- If you're not comfortable with either of these methods, simply flip a coin!

Again, because all the candidates will have passed through a rigorous selection process, any choice is likely to be a good one.

Good luck and good hiring.



Brian Jeffrey  
President

## Hiring Interview Summary Sheet

**Candidate:** \_\_\_\_\_

**Position being considered for:** \_\_\_\_\_

Use this form to record the progress of a candidate's interview.

**Step 1: Telephone Pre-Qualification Interview**

Date: \_\_\_\_\_ Proceed to Step 2?    Yes    No

**Step 2: Sales Temperament Assessment**

Date Assigned: \_\_\_\_\_  
Date Completed: \_\_\_\_\_ Proceed to Step 3?    Yes    No

**Step 3: Initial Face-to-Face Interview – General Questions**

Date: \_\_\_\_\_ Proceed to Step 4?    Yes    No

**Step 4: Second Face-to-Face Interview – Sales-Based Questions**

Date: \_\_\_\_\_ Proceed to Step 5?    Yes    No

**Step 5: Mini-Competency Quiz**

Date: \_\_\_\_\_ Proceed to Step 6?    Yes    No

**Step 6: Simulated Sales Call**

Date: \_\_\_\_\_ Passed?                      Yes    No

**Step 7: Subjective Assessment – Other Considerations**

Date: \_\_\_\_\_ Passed?                      Yes    No

**Comments:**

## Telephone Pre-Qualification Interview

The purpose of the telephone pre-qualification interview is to assess the potential sales candidate prior to setting up a face-to-face interview. This is particularly important if the candidate is located some distance away and there will be travel expenses involved in conducting a face-to-face interview.

### Instructions:

1. After reviewing the candidate's resume, use the *Questions* form to prepare appropriate questions about the person's CV. Questions for the remaining three categories may be common to all candidates. If not, write the appropriate questions on the form before making the call.

Some questions you might ask:

- What interests you about this job?
- Why do you want to make a change at this point in your career?
- Tell me about your sales experience.

Some typical "knock-out" or disqualifying questions might be:

- Are you willing to travel two days a week?
- How comfortable are you with a commission-only compensation plan?

2. Rate how you *feel* about the candidate's responses by circling the appropriate number on the *Questions* form.
3. Thank the candidate and tell him or her that you'll be back in contact should you decide to move forward.
4. Complete the *Other Observations* form after you terminate the call.

Because most salespeople often use the telephone in dealing with customers, they should sound upbeat, positive, and somewhat enthusiastic. If the candidate lacks these qualities or doesn't impress you, he or she is unlikely to impress your customers as well.

Only move forward with a Sales Temperament Assessment and formal interview if you liked what you heard. While there are no guarantees, if the person sounds good over the telephone, he or she is likely to be even better in person.

If you get poor answers to your questions, or the potential candidate doesn't communicate well over the telephone, go no further. Simply thank the candidate and tell him or her that you'll be back in contact should you decide to move forward.

A bit of preparation and a six- to ten-minute telephone call may save you hours of wasted time.

## Telephone Pre-Qualification Interview – Questions

**Candidate:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Interviewed by:** \_\_\_\_\_

UNSATISFACTORY  
 POOR  
 FAIR  
 SATISFACTORY  
 GOOD  
 EXCELLENT

**CV-Related Questions:**

- |    |   |   |   |   |   |   |
|----|---|---|---|---|---|---|
| 1) | 0 | 1 | 2 | 3 | 4 | 5 |
| 2) | 0 | 1 | 2 | 3 | 4 | 5 |
| 3) | 0 | 1 | 2 | 3 | 4 | 5 |

**Position-Related Questions:**

- |    |   |   |   |   |   |   |
|----|---|---|---|---|---|---|
| 1) | 0 | 1 | 2 | 3 | 4 | 5 |
| 2) | 0 | 1 | 2 | 3 | 4 | 5 |
| 3) | 0 | 1 | 2 | 3 | 4 | 5 |

**General Questions:**

- |    |   |   |   |   |   |   |
|----|---|---|---|---|---|---|
| 1) | 0 | 1 | 2 | 3 | 4 | 5 |
| 2) | 0 | 1 | 2 | 3 | 4 | 5 |

**Knock-Out Question(s):**

- |    |   |   |   |   |   |   |
|----|---|---|---|---|---|---|
| 1) | 0 | 1 | 2 | 3 | 4 | 5 |
| 2) | 0 | 1 | 2 | 3 | 4 | 5 |

**Score: \_\_\_\_\_ or \_\_\_\_\_%** (score ÷ 50 x 100 = %)  
**Maximum score is 50. Minimum acceptable score is 30 (60%).**

## Telephone Pre-Qualification Interview - Other Observations

**Candidate:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Interviewed by:** \_\_\_\_\_

<b>VOICE QUALITY</b>	<b>Yes</b>	<b>No</b>	<b>Comments/Observations</b>
<b>Tone:</b> pleasant, varied, some inflection and not monotone.			
<b>Pace:</b> good pacing, neither too fast nor too slow; not rushed.			
<b>Diction:</b> crisp, clear, correct word pronunciation.			
<b>Volume:</b> easily heard; neither too loud nor too soft.			
<b>Vocabulary:</b> avoided overuse of slang, filler words, non-professional words or phrases.			
Total			<i>5 yeses required*</i>

<b>LISTENING TECHNIQUES</b>	<b>Yes</b>	<b>No</b>	<b>Comments/Observations</b>
Acknowledged questions and statements.			
Answers were correct, clear and concise. Didn't over-answer.			
Didn't interrupt.			
Allowed interviewer to interrupt.			
Encouraged two-way communications by pausing occasionally.			
Asked questions to get more information or to ensure understanding.			
Total			<i>At least 3 yeses required*</i>

<b>SALES &amp; SERVICE ATTRIBUTES</b>	<b>Yes</b>	<b>No</b>	<b>Comments/Observations</b>
<b>Interested:</b> volunteered information without being prompted. Had a basic understanding of the company and the position.			
<b>Confident:</b> responded without hesitancy.			
<b>Courteous:</b> questions and comments were phrased politely.			
<b>Communicative:</b> acknowledged, paraphrased, recapped, or mirrored questions and answers.			
<b>Persuasive:</b> tried to sell himself/herself for an interview.			
Total			<i>At least 2 yeses required*</i>

**\*Scoring:** Candidates should score a Yes in all 5 categories under Voice Quality, 3 out of 6 under Listening Techniques, and 2 out of 5 under Sales & Service Attributes before doing a Sales Temperament Assessment or being considered for a face-to-face interview.



## Sales Temperament Assessment

This step is not an interview but is part of the hiring process. The Sales Temperament Assessment (STA) is a simple, easy-to-complete online assessment that you can use to determine whether the candidate is temperamentally suited for your particular selling situation.

While the STA was developed by Brian Jeffrey, it is now the property of Callidus Software and is marketed on their Sales Selector website at [www.SalesSelector.com](http://www.SalesSelector.com). A sample report and information on how it works, resources, and pricing can be found at that site.

We still highly recommend the use of the STA, or similar assessment, for the reasons outlined below and in Appendix A (page 28).

### Instructions:

1. Write down the candidates' name and email address on the form provided.
2. Log into your account at [SalesSelector.com](http://SalesSelector.com) and using the email address from the form, assign an assessment to the candidate.
3. After you have received and reviewed the STA, use the form to summarize the results.

We suggest you do the STA early in the hiring interview process to avoid wasting any more time and money on a potential dud. Also, the STA will give insights into what to watch for or what to explore during the face-to-face interview.

Some examples:

- If the STA indicates that the candidate is overly social, watch for long answers to short questions. Is the candidate charming but boring? Will his or her long-windedness confuse your customers?
- If the STA indicates low morale or a decrease in competitiveness, you may want to explore the reason why. Is the cause business or personal? You don't want to hire a problem.
- If the STA indicates that the candidate is inflexible and/or stubborn, how will the person react to your management style? Will the candidate take direction well? Will he go against company policies that he doesn't agree with? Is he a team player?
- If you get an "invalid" report, you should investigate the reasons why. An invalid report often results from the candidate having some unresolved problems and, again, you don't want to hire a problem.

## Sales Temperament Assessment

**Candidate:** \_\_\_\_\_

**Email Address:** \_\_\_\_\_

**Date Assigned:** \_\_\_\_\_

**Assigned by:** \_\_\_\_\_

**Date Completed:** \_\_\_\_\_

### Summary of Sales Temperament Assessment Results:

**Primary Selling Style:** \_\_\_\_\_

**Temperament to Succeed in Sales:** \_\_\_\_\_ out of 10

**Suitability for the Position:** \_\_\_\_\_ out of 10

**Overall Assessment:**

- has the potential to be a top performer
- has the potential to be a good performer
- has the potential to perform well with a minimum of supervision
- may succeed in sales *if given the proper guidance, supervision, and coaching*
- may succeed in sales *only if possessing a great deal of desire, drive and discipline*

**Competitiveness Rating:**

- not inclined to be competitive
- somewhat competitive
- competitive
- very competitive
- highly competitive
- extremely competitive

**Persistence Rating:**

- not inclined to be persistent
- somewhat persistent
- persistent
- very persistent
- extremely persistent

**Any Red Flags?**  Yes  No

**Any Other Comments?**  Yes  No

## Initial Face-to-Face Interview General Questions

The primary purpose of this interview is to uncover additional general information about the candidate. This form contains standard interview questions which are easy for the candidate to answer and provide you with insights into who the candidate is, where he worked, where he's been and where he wants to go. This step of the interview process takes between 20-30 minutes.

*Note:* If there are any issues from the Sales Temperament Assessment that you want to explore with the candidate, bring them up at this time (see page nine for examples).

### Instructions:

1. Questions may be asked in any order. Under each question, in italics, is the reason you're asking the question and/or what to watch for in the answer.
2. Rate how you *feel* about the candidate's responses by circling the appropriate number on the form.
3. Use the space below each question to make short notes. Only make detailed notes if it is important that you remember something.
4. Keep the interview moving along by glancing at the next question as you rate the response to the current one.
5. If a response warrants further exploration, ask the appropriate question. For example, if you get a *yes* response to the question, "Have you ever felt that you've been treated unfairly by an employer?", you might then ask, "Would you mind telling me about it?"
6. At the end of the interview, calculate the candidate's score by adding up the numbers you circled. The maximum attainable score is 85. We consider a pass to be 51 (60%) or more.

We recommend that you do not proceed with a second face-to-face interview, unless the candidate scores at least 60%.

We suggest that you conduct the initial face-to-face interview with all of your potential candidates before moving forward with anyone. Once all of your candidates have completed the first round of face-to-face interviews, you can review the overall results and determine who you want to continue with. You may find that none of the candidates are worth a second look. On the other hand, if you don't have a large number of candidates and they all look reasonable, you may bring them all back for another interview.

## Initial Face-to-Face Interview — General Questions

**Candidate:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Interviewed by:** \_\_\_\_\_

UNSATISFACTORY  
POOR  
FAIR  
SATISFACTORY  
GOOD  
EXCELLENT

**Why do you think you'd like to work for our company?**

*Does the applicant know anything about our organization?  
Was he/she interested enough to find out something about us before applying?*

0 1 2 3 4 5

**What types of positions have you held in the past?**

*Has he/she done similar types of jobs? What training may be required?*

0 1 2 3 4 5

**What types of things have you sold in the past?**

*Any similarity to our product/service? What product training is necessary?*

0 1 2 3 4 5

**Why did you leave your last position?**

*Do the same circumstances exist here?*

0 1 2 3 4 5

**What did you like best about your last position?**

*Will he/she be doing the same things with our company?*

0 1 2 3 4 5

**What did you like least about your last position?**

*Will he/she be required to do the same things with our company?  
Are the dislikes reasonable? Unreasonable?*

0 1 2 3 4 5

**What do you consider to be your strengths?**

*Are they usable strengths? Does the applicant know him/herself well?*

0 1 2 3 4 5

**What things about yourself would you like to improve or do better?**

*Will the weaknesses hamper this person on the job?  
Does the applicant know him/herself well?*

0 1 2 3 4 5

**Have you ever felt that you've been treated unfairly by an employer?**

*If yes, investigate closely. Is the applicant being reasonable?  
Is this person a potential troublemaker?*

0 1 2 3 4 5

UNSATISFACTORY  
POOR  
FAIR  
SATISFACTORY  
GOOD  
EXCELLENT

0 1 2 3 4 5

**What sales training have you taken?**

*If none, how serious is he/she about a sales career.  
If yes, was it company sponsored or did the applicant pay for it?*

0 1 2 3 4 5

**What do you feel would be good methods of finding prospects for our type of product/service?**

*Does the applicant know our market? Does he/she exhibit some creativity?  
Does the applicant already have some prospects?*

0 1 2 3 4 5

**Does it bother you when people outperform you?**

*Does this person exhibit any ego drive and competitiveness?*

0 1 2 3 4 5

**What types of books do you enjoy?**

*Is the applicant well rounded?  
Does he/she read career-related publications? Any sales or motivational books?*

0 1 2 3 4 5

**What's the worst day you've ever had in your selling career? How did you deal with it?**

*How quickly does the applicant think under pressure? Was the situation handled in a reasonable manner? Did he/she salvage a bad situation or make it worse?*

0 1 2 3 4 5

**What is the one thing you'd like most in your next job, apart from compensation or challenge?**

*Is this person really interested in this position, or is he/she simply waiting until their dream position comes along? Is the applicant being unrealistic?*

0 1 2 3 4 5

**What sort of thing would you like to be doing in 5 years?**

*Is the applicant realistic? Does he/she show a reasonable amount of ambition?  
Is this person being honest, or just saying what he/she thinks I want to hear?*

0 1 2 3 4 5

**What are your income requirements or expectations?**

*Are the applicant's expectations reasonable and attainable?  
Did the applicant try to avoid answering? Were they coy?*

0 1 2 3 4 5

**Score = \_\_\_\_\_ or \_\_\_\_\_% (score ÷ 85 x 100 = %)**  
**Maximum score is 85. Minimum acceptable score is 51 (60%).**

## Second Face-to-Face Interview Sales-Based Questions

The purpose of the second interview is to find out more about how the candidate goes about his or her selling day. This form contains general questions about how the candidate prospects, how he manages his time, what kind of selling style he uses, etc. This interview can usually be completed in 10-20 minutes depending upon how verbose the candidate is.

If this step isn't being conducted by a sales manager or seasoned salesperson, we recommend that one of these people be present during this interview to assist in evaluating the candidate's responses.

### Instructions:

1. Questions may be asked in any order. Under each question, in italics, is the reason you're asking the question and/or what to watch for in the answer.
2. Rate how you *feel* about the candidate's responses by circling the appropriate number on the form.
3. Use the space below each question to make short notes. Only make detailed notes if it is important that you remember something.
4. Keep the interview moving along by glancing at the next question as you rate the response to the current one.
5. If a response warrants further exploration, ask the appropriate question or questions.
6. At the end of the interview, take a few moments to calculate the candidate's score by adding up the numbers you circled. The maximum attainable score is 85. We consider a pass to be 51 (60%) or more.

If the candidate doesn't score well, there is no reason or any value in indicating that fact to the person. Simply thank the candidate for coming in, let him know you'll contact him should you wish to pursue the situation further, and send the person on his way feeling good about himself.

## Second Face-to-Face Interview — Sales-Based Questions

Candidate: \_\_\_\_\_ Date: \_\_\_\_\_

Interviewed by: \_\_\_\_\_

UNSATISFACTORY  
POOR  
FAIR  
SATISFACTORY  
GOOD  
EXCELLENT

0 1 2 3 4 5

**What is it about yourself that you feel makes you a good salesperson?**

*Can he/she sell him/herself to me? Are these qualities that will be successful in our particular business?*

0 1 2 3 4 5

**How do you go about organizing your selling day?**

*Does this person plan her/his day in advance or just simply take each day as it comes? When is planning done? Successful salespeople often use Sundays to plan their entire upcoming week.*

0 1 2 3 4 5

**How do you determine who to call, when to call, and how often to call?**

*Does the individual make calls in proportion to potential or does everyone get the same treatment?*

0 1 2 3 4 5

**What type of records do you keep on your prospects or accounts?**

*If some calamity were to befall this person, will I know what he or she has been up to?*

0 1 2 3 4 5

**How do you keep track of your potential sales and opportunities?  
What information do you keep?**

*Will this person be able to give me valid sales forecasts? Is she/he keeping track of pertinent information such as key contacts, prospect's interests, dollar value of the opportunity, estimated close dates, etc.*

0 1 2 3 4 5

**What type of pre-call planning, if any, do you do?**

*Does this person set call objectives or just fly by the seat of his/her pants?*

0 1 2 3 4 5

**What factors do you consider most important to successful selling?**

*Watch for listening skills, persistence, being organized, understanding the prospect's needs, servicing the account, follow-up, building rapport, motivation, enthusiasm, etc.*

0 1 2 3 4 5

**Give an example of when you are most easily discouraged and how you deal with it?**

*Is this person easily discouraged? How does she/he deal with adversity?*

0 1 2 3 4 5

**Where do you hope to be, career-wise, in five years?** (Part 1 of 2)

*Are the ambitions realistic?*

UNSATISFACTORY  
POOR  
FAIR  
SATISFACTORY  
GOOD  
EXCELLENT

0 1 2 3 4 5

**What plans do you have to reach your career goals?** (Part 2 of 2)

*Does the person know how to get to where he/she wants to go? Does he/she exhibit any ambition?*

0 1 2 3 4 5

**Tell me about a time when you had a serious setback and how you dealt with it?**

*Is there a sense of determination?*

0 1 2 3 4 5

**Apart from business, what personal experience or achievement are you the most proud of?**

*Is there a sense of enthusiasm?*

0 1 2 3 4 5

**Name some things you feel some salespeople do that indicate a lack of integrity.**

*Does the answer indicate that the person has given thought to the topic?*

0 1 2 3 4 5

**How would you deal with a situation where, in order to get a very big order, you are asked by the customer for tickets to an event and to do so is against company policy?**

*Is the candidate ethical or is he/she prepared to bend the rules? If the candidate says he wouldn't provide the tickets, ask him what he would say to the customer. Did the candidate deal with the situation tactfully?*

0 1 2 3 4 5

**What extracurricular activities do you participate in now?**

*Is this person active? Does he/she display any energy?  
Is this person involved in his/her community or volunteer work?*

0 1 2 3 4 5

**You are on a tight schedule. How do you deal with a very good customer who is being overly talkative?**

*Does the person deal with the situation in a creative and/or tactful manner?*

0 1 2 3 4 5

**If you were the sales manager of your previous company, what would you change?**

*Did the candidate give a thoughtful and positive response?*

0 1 2 3 4 5

**Score = \_\_\_\_\_ or \_\_\_\_\_% (score ÷ 85 x 100 = %)**  
**Maximum score is 85. Minimum acceptable score is 51 (60%).**



## Mini Competency Quiz

The purpose of this quiz is to determine the level of the candidate's knowledge about his or her chosen career — selling. Because it usually “takes one to know one,” this step of the interview process is best conducted by the sales manager or a seasoned and trained salesperson with the assistance of a HR specialist if available.

Seasoned salespeople will have a reasonable answer for most of the questions on this form. Their answers may not be exactly the same as those provided, but they will make sense. “Wannabe” salespeople won't have a clue about most of them. Watch for the ones who believe that BS baffles brains and try to snow their way through the quiz. They will do the same with your customers.

### Instructions:

1. You can start this step by saying something like, “I'm going to ask a few questions to assess your knowledge of selling. You'll probably find that some of my questions are right out of Sales 101.”
2. Ask the questions in a casual manner and allow a reasonable latitude in the answers. Being close counts. Those people who have had sales training will recognize that most of these questions are pretty fundamental while others who have not had any training will be completely stumped.
3. The questions are designed to be asked in the order presented and get more challenging as you progress. Watch how the candidate responds to the situation. Is the candidate nervous, showing signs of stress? Or is the candidate exhibiting the confidence of someone who knows that he or she knows how to do the job?
4. If you don't get reasonable answers to the first four or five easy questions, don't bother asking the rest. It will be too painful to watch.
5. If you complete the quiz, calculate the candidate's score by adding up the numbers you circled. The maximum attainable score is 50. We consider a pass to be 30 (60%) or more.

If the candidate doesn't score well, there is no reason or any value in indicating that fact to the person. Simply thank the candidate for coming in, let him know you'll contact him should you wish to pursue the situation further, and send the person on his way feeling good about himself.

*Note:* The form contains concise answers for your easy reference. Detailed answers to the quiz are included in Appendix B.

## Mini Competency Quiz

Candidate: \_\_\_\_\_ Date: \_\_\_\_\_

Interviewed by: \_\_\_\_\_

UNSATISFACTORY  
POOR  
FAIR  
SATISFACTORY  
GOOD  
EXCELLENT

**1. What three things do you HAVE to know to qualify a prospect?**

- Does the prospect have a *want or need* for what I am selling?
- Do they have the financial *ability* to pay?
- Who has the *authority* to make the final purchase decision?

0 1 2 3 4 5

**2. Give an example of two popular closing techniques.**

- The four most popular closes:
  - Assumptive
  - Alternate Choice
  - Minor Point
  - Direct Question

0 1 2 3 4 5

- Other closes:
  - Ben Franklin or Weighing
  - Summary
  - Recommendation
  - Puppy Dog
  - "Sign Here" or Order Form
  - Right Angle
  - Scare

- If the candidate can't identify a specific closing technique, ask him what he says or does to close a sale.

**3. Are you familiar with the term "trial close"?**

(If the answer is no, go to the next question. If yes, ask:

**What is your definition of a trial close?**

- A trial close is an opinion-asking question that tests the prospect's willingness to buy.

0 1 2 3 4 5

**4. What is the fastest way to get a prospect's favourable attention?**

- Talk about something that is of interest to the prospect.

0 1 2 3 4 5

**5. When you are describing your product or service to a prospect, what is the prospect listening for?**

- The prospect is listening for benefits, a reason to buy.

0 1 2 3 4 5

	UNSATISFACTORY	POOR	FAIR	SATISFACTORY	GOOD	EXCELLENT
<b>6. Are you familiar with the term Unique Selling Proposition (USP) or Elevator Pitch?</b>	0	1	2	3	4	5
<i>(If the answer is no, go to the next question. If yes, ask:</i>						
<b>What is your definition of the term and why is it important?</b>						
<ul style="list-style-type: none"> <li>• <i>The USP is a short statement that clearly and simply expresses an obvious reason why the prospect should do business with you.</i></li> <li>• <i>Can the candidate give you a USP for his current employer?</i></li> </ul>						
<b>7. What is the main reason for the price objection?</b>	0	1	2	3	4	5
<ul style="list-style-type: none"> <li>• <i>Your price exceeds the value of what you're selling in the prospect's mind.</i></li> </ul>						
<b>8. What is the first thing you should do when you get an objection?</b>	0	1	2	3	4	5
<ul style="list-style-type: none"> <li>• <i>Avoid a confrontational response by acknowledging the objection with an empathetic statement and/or seeking clarification of the prospect's concerns.</i></li> </ul>						
<b>9. When are the four times you can handle an objection?</b>	0	1	2	3	4	5
<ul style="list-style-type: none"> <li>• <i>The four times are now, later, never, or before the objection comes up.</i></li> <li>• <i>How creative is the candidate?</i></li> </ul>						
<b>10. Are you familiar with the concept of the prospecting pipeline or sales funnel?</b>	0	1	2	3	4	5
<i>(If the answer is no, the quiz is completed. If yes, ask:</i>						
<b>Describe how you use it in your current or recent sales position.</b>						
<ul style="list-style-type: none"> <li>• <i>A prospecting pipeline is a source of sales leads.</i></li> <li>• <i>The sales funnel is the sales process that leads to a closed sale.</i></li> </ul>						

**Score = \_\_\_\_\_ or \_\_\_\_\_% (score ÷ 50 x 100 = %)**  
**Maximum score is 50. Minimum acceptable score is 30 (60%).**

## Simulated Sales Call

The primary purpose of the simulated sales call as part of the hiring process is to see if the candidate knows how to sell in general and is not just able to sell whatever he or she already sells or has sold. In order to accomplish this, you want to use an appropriate sales scenario that puts the person outside of his or her usual selling environment. The two simulations we provide accomplish this and are deliberately simple and generic in nature. If the scenarios don't suit, simply make up your own.

Like the Mini Competency Quiz, the simulated sales call is best conducted by either a sales manager, a seasoned and trained salesperson, or someone who is familiar with professional selling and who will know what to watch out for during the sales simulation.

### Instructions:

#### The Set-Up

1. Decide which sales scenario is applicable and have a copy ready to give to the candidate:
  - Use Scenario 1 if the candidate currently sells, or has primarily sold, intangibles (services).
  - Use Scenario 2 if the candidate currently sells, or has primarily sold, tangibles (products).
  - If the candidate currently sells both tangibles and intangibles, you can use either scenario.
2. Explain to the candidate that you'd like to get some idea of his ability to sell and think on his feet and in order to do that, you are going to do a simulated sales call with him. (You can expect some candidates to start looking around for the nearest exit but the confident ones will stand their ground.)

We recommend you use the words "simulated sales call" and not the words "role play." Most people would rather sit around sticking pins in their eyes than do a role play! Simulated sales call sounds less threatening.
3. Tell the candidate that he will be given a sales scenario and 10 minutes to prepare.
4. Instruct the candidate to, as much as possible, treat the simulated sales call like a real sales call.
5. Point out that there are no tricks or hidden agendas. You will respond like a typical prospect to whatever questions he asks.

### The Execution

1. Give the candidate a copy of the simulated sales call scenario along with some note paper, and allow 10 minutes so he can prepare. (Note: Be sure to get the sheet back at the end of the simulation.)
2. Begin the simulated sales call by greeting the candidate as if he were a salesperson coming in to sell the product/service you have assigned.
3. The simulated sales call should be as realistic as possible and done in a kind and courteous manner.
4. Allow no more than 30 minutes for the simulation.
5. Once the simulated sales call and interview are over and the candidate has left, complete the checklist/scoring sheet. Calculate the candidate's score by adding up the numbers you circled. The maximum attainable score is 100. We consider a pass to be 60 (60%) or more.

-----  
*Note:*

You might want to consider giving the candidate the option of NOT doing the simulated sales call . The results can be very telling. It will be your decision as to whether or not to move forward with the candidate should he or she decline to do the simulation.

This is an opportunity for the candidate to prove to you that he or she knows how to sell. In our view, if the candidate doesn't have the confidence to do the simulated sales call , I'd be very concerned about the person's ability to perform in the real world.

Our suggestion is that if the candidate declines to do the simulated sales call , politely terminate the process and send the person on his or her way.

If you decide to give the candidate the option of NOT doing the simulated sales call , you can do so by saying something like:

"I'm going to give you the option of doing or not doing a simulated sales call with me. What we do is give you a neutral sales situation and some time to prepare and then have you make a simulated sales call. The decision is yours. Will you do it?"

-----

## Simulated Sales Call - Scenario 1

**For use with a salesperson who currently sells,  
or has primarily sold, intangibles (services)**

### **Scenario:**

You are selling promotional/ad specialty items (coffee cups, calendars, pens, etc).

We recently met at a networking event and I expressed an interest in meeting with you. You know the following about me:

- I own and operate a small flower shop.
- I've been successful in getting local business but there is room to expand.
- I do very little advertising and count primarily on walk-ins and call-ins.
- I'm looking for ways to expand the business.
- The business is split about 35% businesses and 65% individuals.

We made an appointment to get together and this is that meeting.

### **Note:**

- You have 10 minutes to prepare.
- As much as possible, treat the simulated sales call like a real sales call.
- There are no tricks or hidden agendas. I will respond like a typical prospect to whatever questions you ask.

---

Upon completion of the simulated sales call,  
please return this sheet to the interviewer.  
Thank you.

---

## Simulated Sales Call - Scenario 2

**For use with a salesperson who currently sells,  
or has primarily sold, tangibles (products)**

### **Scenario:**

You are selling temporary personnel services.

We recently met at a networking event and I expressed an interest in meeting with you. You know the following about me:

- I operate a seasonal landscape design business.
- I use the winter months to prepare for the upcoming year's activity.
- We get lots of leads from local trade shows.
- My salespeople do the lead follow-up and set their own appointments.
- I need more sales but I have problems finding additional salespeople. The ones I have now are good and I don't want to lose them.

We made an appointment to get together and this is that meeting.

### **Note:**

- You have 10 minutes to prepare.
- As much as possible, treat the simulated sales call like a real sales call.
- There are no tricks or hidden agendas. I will respond like a typical prospect to whatever questions you ask.

---

Upon completion of the simulated sales call,  
please return this sheet to the interviewer.  
Thank you.

---

## Simulated Sales Call — Checklist & Scoring Sheet

**Candidate:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Interviewed by:** \_\_\_\_\_

*To be completed after the simulated sales call is over and the candidate has left.*

### GENERAL

**Approach:** Greeting should be warm and friendly.  
Handshake should be firm but not excessive.

WRONG OR INAPPROPRIATE  
NOT ACCEPTABLE  
MINIMUM ACCEPTABLE  
REASONABLE  
OUTSTANDING OR EXCEPTIONAL

0 1 2 3 4

**Introduction:** Did the salesperson give a brief introduction of the company and himself.

0 1 2 3 4

**Eye Contact:** Is eye contact natural and often. Watch for excessive blinking or looking away that would indicate a lack of confidence or insincerity.

0 1 2 3 4

**Voice & Verbal Skills:** Doesn't speak in a monotone.  
Uses complete sentences and good grammar.

0 1 2 3 4

**Uses Prospect's Name:** Does the salesperson use but not overuse the prospect's name?

0 1 2 3 4

### QUALIFYING THE PROSPECT

**Listening Skills:** Acknowledges and responds appropriately to the prospect's responses. Give full marks if the person takes notes.

0 1 2 3 4

**Determining Prospect's Needs:** How well did the salesperson uncover the prospect's needs?

0 1 2 3 4

**Timing Issues:** Did the salesperson determine when a decision to make a purchase would be made.

0 1 2 3 4

**Competition:** Did the salesperson ask who he/she was competing with?

0 1 2 3 4

**Budget/Funding:** Did the salesperson determine how much the prospect was prepared to spend?

0 1 2 3 4

**Authority:** Did the salesperson ask who would make the final purchasing decision?

0 1 2 3 4



WRONG OR INAPPROPRIATE  
NOT ACCEPTABLE  
MINIMUM ACCEPTABLE  
REASONABLE  
OUTSTANDING OR EXCEPTIONAL

**SALES PRESENTATION**

<b>Structure:</b> Did the presentation follow a logical sequence?	0	1	2	3	4
<b>Prospect Involvement:</b> Did the salesperson get the prospect involved in the presentation?	0	1	2	3	4
<b>Feature/Benefits:</b> Was there a relationship established between the facts/features and the prospect's needs?	0	1	2	3	4
<b>Credibility:</b> Did the benefits make sense?	0	1	2	3	4
<b>Creativity:</b> Was she/he creative?	0	1	2	3	4
<b>Objection Handling:</b> How effectively did the salesperson deal with the prospect's objections or concerns?	0	1	2	3	4

**ASKING FOR THE BUSINESS**

<b>Transition:</b> Did the salesperson move steadily towards closing the sale?	0	1	2	3	4
<b>Summary:</b> Did the salesperson summarize key points?	0	1	2	3	4
<b>Close:</b> Did the salesperson ask for the business or, at a minimum, use a trial close?	0	1	2	3	4

**OVERALL IMPRESSIONS**

<b>Personality:</b> Is the salesperson's personality typical of that of successful salespeople?	0	1	2	3	4
<b>Attitude:</b> Is the salesperson self-assured and self-confident?	0	1	2	3	4
<b>Enthusiasm:</b> Does the salesperson exhibit a natural enthusiasm?	0	1	2	3	4
<b>Impression:</b> Would you do business with this person?	0	1	2	3	4
<b>Referrals:</b> Would you give this person the names of your friends?	0	1	2	3	4

**Score = \_\_\_\_\_ or \_\_\_\_\_%** (score ÷ 100 x 100 = %)  
**Maximum score is 100. Minimum acceptable score is 60 (60%).**

## Subjective Assessment Other Considerations

The purpose of this form is to have a place to consolidate and record your overall impression of the candidate. The form contains 14 categories with suggested standards to allow you to consistently evaluate candidates.

Complete this form at the end of the interview process.

**Instructions:**

1. Using the criteria under each of the columns, make a subjective judgement in each of the 14 categories. Circle the appropriate comment.
2. Total the number of circled comments in each column and complete the scoring at the bottom of the form.

## Subjective Assessment — Other Considerations

**Candidate:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Interviewed by:** \_\_\_\_\_

Circle or highlight your selection in each category for easy reference.

	<b>POOR</b>	<b>FAIR</b>	<b>SATISFACTORY</b>	<b>GOOD</b>	<b>EXCELLENT</b>
<b>Personal Appearance / First Impression</b>	Poor appearance, careless, unkempt, poor/bad taste	No evidence of special care or display of judgement	Generally neat, good appearance, appropriately dressed	Careful of personal appearance and dresses in good taste	Immaculate in dress and person; presents a professional image
<b>Physical Appearance</b>	Anemic, sickly, overweight, slouchy carriage	Slow moving, low energy	Looks to be in good health and trim	Appears energetic, clear skin, alert eyes	Seems to be in excellent condition; especially attractive
<b>Voice</b>	Unpleasant, irritating	Hard to hear or understand; speaks indistinctly	Pleasant, good tone, not monotone	Very clear and easy to understand	Unusually pleasing in quality, tone, strength, and clarity
<b>Poise / Maturity</b>	Ill at ease, uncomfortable, embarrassed	Displays little self-confidence	Shows no unusual lack of poise or maturity	Apparently completely at ease	Unusually self-possessed
<b>Communication Skills</b>	Confused, illogical	Scattered and overly involved; too talkative	Gets ideas across well	Superior ability to express self	Unusually logical, clear, and convincing
<b>Self-confidence</b>	Timid or cocky	Hesitant or overbearing	Reasonably self-assured	Very sure without being cocky	Not only sure of self but inspires confidence in ability
<b>Initiative</b>	Doesn't display any initiative	Will undertake projects if pushed or motivated	Willing to do the job	Prepared to go the extra mile	Strong take-charge attitude; wants to lead the way
<b>Tact</b>	Overly blunt	Very frank and straight forward	Forthright without being rude	Very tactful	Unusually tactful and proper
<b>Attitude</b>	Quite negative	Somewhat negative	Generally positive	Very positive	Extremely positive
<b>Enthusiasm</b>	Very laid back and low key	Displays mild enthusiasm for particular topics	Generally upbeat and enthusiastic	Enthusiastic and animated	Very positive without hype or insincerity
<b>Manners</b>	Rude and uncaring	Insensitive to others	Polite and proper	Displays deference to others	Unusually polite and proper
<b>Persistence</b>	Quits or gives in easily	Not particularly persistent	Will commit to getting the job done	Will stick to a project but knows when to quit	Prepared to see a project through to the end regardless without being stubborn
<b>Decisiveness</b>	Will usually defer to others for a decision	Will make a decision after much consideration and fact collection	Makes decisions after collecting the facts and pertinent information	Prepared to make decisions fairly quickly	Prepared to make a quick decision but prepared to change it if necessary
<b>Interview Preparation</b>	No apparent preparation; knew little or nothing about the position or the company	Somewhat aware of the position he/she is applying for	Knew something about both the company and the position	Displayed good knowledge of both the company and the position	Fully investigated both the position and the company prior to the interview
<b>TOTALS</b>	_____ x 1 = _____	_____ x 2 = _____	_____ x 3 = _____	_____ x 4 = _____	_____ x 5 = _____

**Score = \_\_\_\_\_ or \_\_\_\_\_%** (score ÷ 70 x 100 = %)  
**Maximum score is 70. Minimum acceptable score is 42 (60%).**

## Sales Temperament Assessment™ — Additional Information —

What's your time worth?

- ➡ If you knew that the candidate you're about to interview is going to be a complete waste of time, would you do it anyway?
- ➡ Would it be helpful to know in advance of an interview that the candidate is unlikely to succeed in sales, or maybe the person is going to require a lot of handholding if he is to be successful?
- ➡ How about if you knew that the candidate was a poor match to sell what you wanted sold, would you spend your time interviewing such a person?

If you're like me, you don't have a lot of time to waste these days and if I can find a tool that will help eliminate wasted time, I want to use it.

The Sales Temperament Assessment (STA) is just such a tool. Those of you who already use the STA know that it is an inexpensive way to get an impartial view of a candidate before you invest a lot of time and money.

Here are just a few things the STA will tell you:

- On a scale of 1 to 10, how successful the candidate is likely to be in sales in general.
- On a scale of 1 to 10, how suitable the candidate is to sell what you want sold.
- How competitive the candidate is.
- How persistent the candidate is.
- Whether there are any "red flags" that you should be aware of.
- The candidate's selling style.

If you're not already using the STA and want to know more about it, go to [www.SalesSelector.com/SalesSelection/faqs.html](http://www.SalesSelector.com/SalesSelection/faqs.html). You can also request a sample report, check out the various resources, and set up your free account.



Brian Jeffrey  
President

## Mini Competency Quiz for Prospective Salespeople — Detailed Answers —

### 1. What three things do you HAVE to know to qualify a prospect?

The three things a salesperson absolutely needs to know in order to qualify a prospect are:

- **need** (or want)
- **ability** to pay, and the
- **authority** to buy

Does the prospect have a real need (or want) for your product or service, does he have the ability to pay for it (can he afford it!), and does he have the authority to make the final decision (if not, then who?).

-----  
*NOTE:* We find that people either haven't a clue and give some very creative answers, or get two out of the three. Of the three factors, most people will usually miss "authority."  
-----

### 2. Give an example of two popular closing techniques.

The four most popular closes are the:

- **Assumptive**
- **Alternate Choice**
- **Minor Point** and
- **Direct Question**

Other less popular closes are the:

- **Ben Franklin**
- **Weighing** or **Summary**
- **Puppy Dog**
- **Sign Here**
- **Right Angle**
- **Scare** and
- **Order Form**

-----  
*NOTE:* Don't worry if the person can't give the actual names. They get more points for describing how a particular close is executed. Ask the individual to describe his favourite closing technique. Watch to see if he has one or two specific closing techniques he is comfortable with. If he doesn't, he may not be attempting to close very often. If a person doesn't know what or how to do something, chances are he isn't doing it.  
-----

### 3. Are you familiar with the term trial close? What is your definition of a trial close?

A trial close is an opinion-asking question, the answer to which indicates where you are in the sale or how responsive the prospect is to your proposal. It's a way of testing the prospect's buying temperature before attempting a close.

-----  
*NOTE:* Many salespeople confuse the Alternate Choice close with a Trial Close.  
-----

### 4. What is the fastest way to get a prospect's favourable attention?

The fastest way to get someone's favourable attention is to talk about something that is of interest to the prospect. The best way to do this is to ask questions pertaining to the prospect's needs or interests. Ask about the *prospect*.

-----  
*NOTE:* The real sales pro will get this one. Others will say that the best way to get the prospect's attention is to tell the prospect about the product/service. These are the people who think that "telling is selling."  
-----

### 5. When you are describing your product or service to a prospect, what is the prospect listening for?

**Benefits!** More specifically, benefits to *the prospect*. A reason to buy. Like everyone else, prospects listen to radio station WIFM-FM, "What's In It For Me — FOR ME!"

-----  
*Note:* On our initial mini-competency test, the question was, "What three key questions are on a prospect's mind and why is it important to answer them?" Only the most seasoned sales pros or someone who just came off a sales training program could answer that question easily. You may still want to use it in some situations, so here is the answer:

- 1 - Why should I buy your product or service?
- 2 - Why should I buy it from you?
- 3 - Who says so? (Prove it!)

If a salesperson doesn't answer these questions for the prospect, the prospect will answer them for himself and you may not like the answers he comes up with. Give the prospect a reason to buy by answering these three questions.  
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## 6. Are you familiar with the term Unique Selling Proposition (USP) or Elevator Pitch? What is your definition of the term and why is it important?

Also known as the “elevator pitch,” the USP is a **short statement** that clearly and simply expresses an obvious reason for the prospect to do business with you. It’s important in order to clearly distinguish your firm (or you) from all others in your field. **It often answers the question, “Why should I buy from you?”** A good USP **differentiates you from your competition.**

-----  
*NOTE:* If the answer is no, then ask if he/she would like to take a guess at the answer. Or, if the interview isn’t going well, simply say, “Then I won’t ask you why it’s important,” and go on with the interview. The sharp ones figure it out and the creative ones get close.  
-----

## 7. What is the main reason for the price objection?

**The prospect doesn’t see the value. His want or need is less than the cost of the product or service.**

That’s why salespeople should never talk cost (or price) until they have established value. There are three reasons why the price objection usually comes up. They are:

- 1 - Your price *is* too high.
- 2 - The prospect *can’t* afford it.
- 3 - The prospect *doesn’t want* to afford it.

Number three is the main reason people don’t buy. If they don’t want it, they won’t buy it!

## 8. What is the first thing you should do when you get an objection?

**Acknowledge it.** Too many salespeople start to answer the objection without first cushioning it **with an empathic statement.**

Acknowledging the objection doesn’t mean you agree with the prospect, but it does imply a degree of understanding on the part of the salesperson. A simple, “I understand how you feel,” or, “That’s a good point,” will go a long way towards smoothing out the objection-answering process.

-----  
*NOTE:* This is a simple question so look for a simple answer. Many people turn this question into a disaster just like they turn simple objections into a disaster. You may have to restate the question in order to get a reasonable answer.  
-----

## 9. When are the four times you can handle an objection?

The four times you can handle an objection are:

- **Now** – when the objection arises (half-baked objections or objections based on misunderstandings).
- **Later** in the sale (trivial objections or a put-off).
- **Never** (trivial objections).
- **Before** it comes up (price or other common objections).

-----  
*NOTE:* We usually preamble this question by saying that the next two questions are trick ones. Sometimes we'll disclose the first part of the answer (when the objection arises) as an example and hope that the person picks up at least two of the remaining three times.  
-----

## 10. Are you familiar with the concept of the prospecting pipeline or sales funnel? Describe how you use it in your current or recent sales position.

The “prospecting pipeline” refers to the various sources of leads, prospects, suspects, possible opportunities, etc, that are fed into your “sales funnel” for processing. A simple definition of a prospecting pipeline might be sources of leads. Most salespeople will have several sources of possible opportunities.

The “sales funnel” is the process flow that happens once the salesperson has identified someone as being a real prospect. Salespeople will have different terms for the various stages of their sales funnels. Some identify the stages by where they are in the sales process (i.e. pre-qualify, qualify, presentation, close, etc), while others may use the prospect’s state of mind (i.e. cold, lukewarm, warm, hot, etc).

Unless the candidate works in an environment of transactional sales or sales with an extremely short sales cycle, he or she should have heard of one or both of these terms.

Be wary of a candidate who works in B2B sales and has not heard of these terms.

-----  
*NOTE:* While technically different, some salespeople will use the terms “prospecting pipeline” and “sales funnel” interchangeably.  
-----