



# SUCCESS in SELLING

Developing a World-Class  
Sales Ecosystem

**EXECUTIVE SUMMARY**

Reza Sisakhti

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# EXECUTIVE SUMMARY

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Sales has always been a dynamic profession. Today's fluid business environment, however, is characterized by disruptive business practices, ever-changing customer needs and demands, the emergence of new market opportunities, dramatic technological advances, and a continuing reconfiguration of the sales force. Both sales organizations and sales professionals need to monitor the business landscape continuously in order to identify newly required competencies. To address these evolving trends and sales practices, ATD revised and updated the World-Class Sales Competency Model (WCSCM), originally created in 2008, and published *Success in Selling: Developing a World-Class Sales Ecosystem*, which details the new model's research methodology, describes how recent trends and sales practices are reshaping the sales profession, and explains the architecture and content of the new model and how it can be used by sales organizations and professionals.

## **Value Proposition for the New ATD WCSCM**

The value of the new WCSCM comes from its basis in research: from a robust process for development of the model and from a strong focus on usability. The research uncovered new trends shaping the sales profession, which were incorporated into the model to ensure that the competencies in the model are business essential, future oriented, global, and applicable across industries. The focus on usability resulted in a model that can be scaled and adapted to different types and sizes of organizations.

## **Research and Development Approach**

The study began with an extensive exploration of evolving sales trends that are shaping the sales profession and influencing the competencies needed by all key members of the sales ecosystem, including quota-carrying and customer-facing roles, sales management and leadership roles, and sales enablement roles (for example, sales recruiters, sales trainers and coaches, and professionals in sales compensation and sales operations). Research revealed 12 trends that affect needed knowledge, skills, and key actions for various members of the sales ecosystem.

Next, in-depth, one-on-one interviews with 59 thought leaders and leading sales practitioners worldwide in various industries were conducted to explore evolving sales practices and their impact on the competencies needed by sales professionals today and in the foreseeable future. The results of these interviews, combined with the study of trends, were used to revise the architecture and content of the 2008 sales competency model.

Data then were collected to validate the new sales competency model through one-on-one reviews with thought leaders, focus group discussions with leading sales practitioners and consultants, and a large-scale survey of a wide range of sales and sales enablement practitioners, managers, and leaders worldwide. A total of 295 sales professionals from various regions of the world, numerous industries, and multiple generations participated in the validation process. These results were used to revise and finalize the new ATD WCSCM.

### **Resulting New WCSCM**

The research efforts ensure the incorporation of business-essential and future-oriented competencies. The extensive validation certifies that the model is comprehensive, and the attention to usability issues and input from focus groups and experts in the field enable the model to be adapted and scaled to all types of organizations, for use by individuals as well as organizations.

### **Key Trends Shaping the Sales Profession**

Research identified 12 trends that are shaping the sales profession and influencing the competencies needed by sales and sales enablement professionals today and in the near future. These trends are grouped into four categories: 1) market dynamics and changing customer demands, 2) advances in technology, 3) workforce reconfiguration, and 4) sales talent development (Figure 1).

Figure 1: Trends Shaping the Sales Profession



Each of these trends has the potential to push a sales organization off course, but the combination of them has created a “perfect storm,” requiring organizations to rethink their sales talent development practices. To stay on course and navigate the future, organizations need to adopt a multifaceted strategy to attract, select, engage, assess, retain, and continuously develop competent multigenerational global sales teams. These sales teams must be capable of interacting effectively with tech-savvy, educated, and demanding multigenerational global customers who are far advanced in the buying process by the time they engage a sales team. These sales teams need to develop and maintain competencies in:

- collaborating with marketing professionals and using marketing resources to monitor and establish a social media presence that potential customers will consult
- using conventional and emerging research and analysis to assess customers’ needs and evolving opportunities during planning and pursuit of sales activities
- challenging the customer’s status quo, providing insights into the customer’s current and evolving needs and opportunities, and articulating unique value propositions for proposed solutions
- understanding generational and cultural differences and incorporating a global perspective into sales planning and pursuit efforts.

### **Trend Category 1: Market Dynamics and Changing Customer Demands**

This category highlights the emergence of empowered buyers who are tech-savvy, with access to a wider range of information sources, and better educated than before about available solutions. These educated and empowered buyers increasingly have a low tolerance for generic product and service information and expect sales teams to understand the dynamics of their vertical industry, including their industry's key performance indicators (KPIs) and the major challenges and opportunities that they and their competitors are facing.

Furthermore, these buyers are less interested in dealing with sales professionals who engage in transactional selling by citing product “feature, advantage, and benefit” (FAB). Instead, they are looking for a credible partner who has a solid understanding of their needs and who also challenges them, provides insights, and proposes customized and contextualized solutions to help them both solve tomorrow's problems and optimize and transform their current business. To survive and thrive in this new market of changing customer demands, sales teams need to develop and enhance their competencies in new areas.

This trend category also highlights a shift in traditional boundaries between the sales and marketing functions and a shift in organizational models (outside versus inside sales models). These shifts have implications for sales talent development. For example, the lines between sales and marketing functions are becoming blurred. Current tech-aware, resourceful, and educated customers have access to the marketing messages and digital footprint of multiple solution providers. In most cases, they have begun to compare multiple solutions before calling a sales representative. Organizations are moving toward aligning and integrating their sales and marketing functions to ensure consistency in branding messages. This trend also calls for new competencies.

Another example of shifting organizational models is the adoption of a hybrid sales model, in which “face time” is not the only means of communication with potential buyers. More and more, customers are comfortable making decisions based on a mix of both face-to-face and virtual interactions. Therefore, an increasing number of organizations are expanding and augmenting the traditional role of their “inside sales representatives (ISRs).” ISRs are no longer engaged just in task substitution for the “feet-on-the-street” sales reps.

### **Trend Category 2: Advances in Technology**

This category highlights dramatic technological advances and their impact on sales practices and required sales competencies. For example, conventional and advanced mobile devices (tablets, smartphones, and wearables) have contributed to on-demand availability and accessibility of both sellers and buyers. On-demand voice, video, and text continues to reduce the need for exclusive in-person selling activities, while contributing to reduced cost and improved productivity of the sales force.

The spread of social media as a major source of sales information has provided buyers with a platform to share their issues, concerns, requirements, and opinions with the world (including sales professionals). More often today, sales professionals are expected to make intelligent contributions to buyers' social communities.

Finally, powerful pipeline and customer relationship management (CRM) technologies and applications, along with “big data” mining and advanced analytics, are changing the way many sales organizations target and engage with potential buyers and existing customers. These organizations use data mining and advanced analytics to assess customer data at a more granular level than with traditional approaches. They use intelligence gained from this analysis to obtain insights into customers’ challenges, their past purchasing habits, what they value, and any untapped opportunities.

### **Trend Category 3: Workforce Reconfiguration**

This category highlights the multigenerational trend for both sales teams and customers, with Millennials (born 1981 to 2000) becoming the dominant force as Baby Boomers (born 1946 to 1964) continue to retire, taking with them their experience-based wisdom. Millennials exhibit characteristics that make them uniquely different from preceding age groups. In terms of size, *Time* magazine reports, Millennials are now the largest generation across the globe (Schawbel 2012). According to the Pew Research Center, in 2015 Millennials became the majority demographic of the U.S. workforce, surpassing Generation X (those born between 1965 and 1980) (Fry 2015).

Another trend is continued globalization, accelerated by the interconnectedness of the world economy and by advances in virtual communication technologies. This trend has created global sales teams and global customer purchasing teams, where decisions are made in a distributed but unified manner, especially in global companies.

### **Trend Category 4: Sales Talent Development**

This category reveals changes in the way sales talent is developed. It highlights advancements in CRM systems and web-analytics tools that make it possible to capture information in unprecedented detail on sales successes and win challenges. Once mined, these granular data offer valuable insights into the development needs of sales professionals and can be used to target desired behaviors and learning needs of individuals or teams, thereby remedying poor opportunity qualification, partnering issues, weak account planning, lack of timely follow-up, or poor call-to-close ratios.

Another trend in sales talent development is the emergence of learning environments as a necessity to better accommodate rapidly shifting business needs, the growing virtualization and mobility of the sales force, and the learning preferences of Millennials. For example, according to ATD and i4cp’s *The Mobile Landscape 2015* report, 56 percent of mobile learning programs are designed to support the sales organization.

## **Overview of the New ATD WCSCM**

The new ATD WCSCM, like the original model, covers all key roles in the sales ecosystem. To enhance usability of the new model, and ensure its applicability across the sales professions, these roles are grouped into three categories: 1) Sales Force, 2) Sales Management and Leadership, and 3) Sales Enablement (Table 1).

**Table 1: Key Roles Covered by the New ATD WCSCM**

Sales Force	Sales Management and Leadership	Sales Enablement
<ul style="list-style-type: none"> <li>• Sales representative:                             <ul style="list-style-type: none"> <li>◦ Account manager</li> <li>◦ Territory manager</li> <li>◦ Account executive</li> <li>◦ Inside and outside sales representative</li> </ul> </li> <li>• Sales specialist</li> <li>• Presales technical consultant</li> <li>• Partner/channel account manager</li> </ul>	<ul style="list-style-type: none"> <li>• Sales executive</li> <li>• Sales manager</li> <li>• Sales specialist manager</li> <li>• Presales manager</li> <li>• Partner/channel sales manager</li> </ul>	<ul style="list-style-type: none"> <li>• Sales recruiter</li> <li>• Sales compensation planner</li> <li>• Sales IT specialist</li> <li>• Sales operations analyst</li> <li>• Sales trainer, coach, or consultant</li> <li>• Sales training designer and developer</li> <li>• Sales professor/academic</li> <li>• Sales enablement manager</li> <li>• Sales enablement executive</li> </ul>

The new ATD sales competency model consists of 12 areas of expertise (AOE) divided into the three role categories, as well as four clusters of foundational competencies that are common to all roles within the sales ecosystem. Additionally, each AOE consists of four components: key knowledge areas, skills, actions, and sample outputs.

**Architecture, AOE, and Foundational Competencies**

A major change in the new model is the organization of new and revised AOE into three groups (Sales Force, Sales Management and Leadership, and Sales Enablement). This new architecture enhances the usability of the new model and makes it easier for users to quickly locate and use information about each role (Figure 2).

**Figure 2: Architecture of the New ATD Three-Part Model**



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## Sales Force

This section of the model focuses on quota-carrying, customer-facing sales professionals who need knowledge and skills in acquiring, developing, and retaining accounts, in defining and positioning complex solutions, in selling with and through partners, and in managing and advancing the sales pipeline.

Roles include account managers, inside and outside sales representatives, sales specialists, presales consultants, and partner and channel sales representatives.

The following five AOE are aligned to Sales Force roles:

- *AOE 1: New Account Acquisition*—This AOE includes the knowledge, skills, and actions required to pursue opportunities and acquire new accounts.
- *AOE 2: Account Development and Retention*—This AOE includes the knowledge, skills, and actions required to nurture, grow, and maintain existing accounts.
- *AOE 3: Complex Solution Definition and Positioning*—This AOE includes the knowledge, skills, and actions required to drive or support complex sales opportunities.
- *AOE 4: Partner Sales Support*—This AOE includes the knowledge, skills, and actions required to manage and support indirect (channel) selling.
- *AOE 5: Sales Pipeline and Forecast Management (shared with Sales Management and Leadership)*—This AOE includes the knowledge, skills, and actions required to follow the sales process and leverage analytics to exploit sales opportunities and ensure achievement of business results.

## Sales Management and Leadership

This section of the model focuses on sales professionals who need skills and knowledge in setting and executing sales strategies, coaching and managing high-performing sales teams, and managing sales forecasts.

Roles include sales managers, presales managers, partner and channel sales managers, sales directors, and sales executives.

The following four AOE are aligned to sales management and leadership roles. Two AOE are unique, one is shared with Sales Force, and one is shared with Sales Enablement:

- *AOE 5: Sales Pipeline and Forecast Management (shared with Sales Force)*—This AOE includes the knowledge, skills, and actions required to use the sales process to manage sales opportunities and to leverage the power of sales analytics to exploit sales opportunities and ensure achievement of business results.
- *AOE 6: Sales Strategy Definition and Execution*—This AOE includes the knowledge, skills, and actions required to develop and implement sales strategies appropriate to market segments and customer-unique needs.
- *AOE 7: Sales Team Management*—This AOE includes the knowledge, skills, and actions required to manage sales teams effectively.
- *AOE 8: Sales Coaching (shared with Sales Enablement)*—This AOE includes the knowledge, skills, and actions required to use sales coaching to develop sales teams and drive sales effectiveness.

### Sales Enablement

This section of the model focuses on sales enablement professionals who need knowledge and skills in attracting, selecting, onboarding, developing, equipping, motivating, rewarding, and retaining the sales force and sales management professionals needed to achieve business results. Roles include sales trainers, sales recruiters, sales operations, and sales compensation.

The following five AOE are aligned to sales enablement roles:

- *AOE 8: Sales Coaching (shared with Sales Management and Leadership)*—This AOE includes the knowledge, skills, and actions required to use sales coaching to develop sales teams and drive sales effectiveness.
- *AOE 9: Sales Talent Selection*—This AOE includes the knowledge, skills, and actions required to recruit, screen, and hire sales talent.
- *AOE 10: Sales Talent Development*—This AOE includes the knowledge, skills, and actions required to train and develop high-performing sales teams.
- *AOE 11: Sales Tool and Process Improvement*—This AOE includes the knowledge, skills, and actions required to ensure availability and effectiveness of tools and processes to facilitate sales.
- *AOE 12: Sales Incentive and Compensation Design*—This AOE includes the knowledge, skills, and actions required to create, implement, and maintain equitable compensation and incentive practices to drive motivation and sales performance.

### Foundational Competencies

This section of the model—shared by all professionals within the sales ecosystem—consists of four clusters of competencies. The following is a brief description of each competency cluster (Table 2):

- **Collaboration**—Enables sales professionals to interact and work interdependently with others
- **Insight**—Allows sales professionals to develop a robust understanding of their customers and to use this insight to facilitate and guide customer decision making through skills in information analysis and synthesis
- **Solution**—Empowers sales professionals to develop strategies for identifying the right solutions to customers' complex problems, generating enthusiasm for the solution they propose, competitively positioning the solution, and negotiating and gaining commitment
- **Effectiveness**—Permits sales professionals to deal with accelerating change and the dynamic nature of the sales environment by demonstrating personal and professional agility and responsibility.

**Table 2: Foundational Competencies**

Collaboration	Insight	Solution	Effectiveness
<ul style="list-style-type: none"> <li>• Relationship building</li> <li>• Alignment building</li> <li>• Strategic partnering</li> <li>• Teaming</li> <li>• Transformational leadership</li> <li>• Customer advocacy</li> </ul>	<ul style="list-style-type: none"> <li>• Business and financial acumen</li> <li>• Sector/industry insight</li> <li>• Evaluating customer experiences</li> <li>• Research analysis</li> </ul>	<ul style="list-style-type: none"> <li>• Product/service acumen</li> <li>• Competitive intelligence</li> <li>• Consultative insight</li> <li>• Negotiating and gaining commitment</li> <li>• Complex problem solving</li> </ul>	<ul style="list-style-type: none"> <li>• Diversity effectiveness</li> <li>• Global awareness</li> <li>• Multigenerational effectiveness</li> <li>• Sales process acumen</li> <li>• Technology fluency</li> <li>• Project management</li> <li>• Effective communication</li> <li>• Ethical decision making</li> </ul>

## Benefits of the New ATD WCSCM

The new ATD WCSCM provides sales organizations and individual members of the sales profession with a state-of-the-art competency framework that can be used as a critical tool and as a set of standards for supporting a variety of talent management goals. For example, the WCSCM can be used to:

- Assess sales competencies at individual, work group, and organizational levels.
- Delineate sales job descriptions and career lattices.
- Develop competency-based hiring guides.
- Define and design sales learning solutions.
- Create learning and career development plans.

The benefits of the WCSCM can be realized at both the organizational and individual level. For example, a sales organization might use the WCSCM to develop and implement a competency assessment initiative to assess gaps at individual, work group, and organizational levels. The results of the competency gap analysis could then be used:

- by individual sales professionals to develop personal career and development plans
- by sales managers to define coaching and development plans for their sales teams
- by an organization to implement strategies and identify investment opportunities to fill the gaps in sales competency acquisition (through hiring) and development (through training and coaching).

## How Organizations Benefit From the WCSCM

The WCSCM sets competency goals and requirements for a full range of sales and sales enablement roles. In doing so, it serves as a guiding force for many groups and functions that are engaged in the following sales talent management and development activities.

### **Creating Sales Job Descriptions and Career Lattices**

The new WCSCM forms the basis of role definitions as well as requirements for both vertical (advancement within a role), horizontal (lateral moves among roles), and diagonal (advancement to a different role) career movements. The WCSCM allows organizations to set objective employee expectations for success by defining not only role-specific knowledge, skills, and actions but also common foundational competencies. Insights gained from the WCSCM can help organizations to:

- Update their existing job descriptions or create new ones in the context of the organization's strategic direction.
- Create career lattices for upward, lateral, and diagonal movements within the sales ecosystem.

**Example:** An inside sales rep can strive to become a territory account manager (advancement within a role) or to become a presales consultant or sales talent developer (lateral career move) by identifying the competency requirements and placing herself at the crossroads of needed experiences and learning opportunities.

### **Screening, Selecting, and Hiring Sales Talent**

The new WCSCM provides a solid foundation for creating competency-based staffing guides that can help a sales organization to screen, select, and recommend job candidates based on an objective set of competency requirements.

### **Conducting Sales Talent Assessments**

The objective standard of excellence defined by the new WCSCM can serve as the basis for determining strengths and opportunities for development for all members in the sales ecosystem. Gaps identified through a “competency assessment” process can be used by various teams in the sales organization to:

- Define plans for creating learning solutions that are targeted to the well-understood needs of sales professionals both at the individual and aggregate levels.
- Create staffing plans to fill sales competency gaps with agility in business-critical areas through hiring and partnering.

### **Creating Sales Learning Solutions and Learning Road Maps**

Together, the areas of expertise and foundational competencies of the new WCSCM can serve as a structural framework upon which entire learning road maps or curriculums can be designed for various roles within the sales ecosystem. The detailed key knowledge, skills, and actions in the WCSCM also provide fine detail to support the design and content of new learning solutions as well as the revision or updating of existing courses and learning modules.

### **How Individuals Benefit From the WCSCM**

The WCSCM provides accurate and objective information to individuals in the sales ecosystem, empowering them to assess their core competencies, seek development opportunities in an informed manner, and pursue personal career goals. The following are examples of how the new WCSCM can benefit individuals in the sales ecosystem:

## Self-Assessment

A self-assessment tool based on common expectations shared through the WCSCM empowers individuals to determine their own sales competency strengths and development gaps for their current and aspirational roles. Such a tool thus provides direction for individuals as they seek formal and informal learning opportunities to fill gaps and increase their value to organizations in their current roles while preparing themselves for the next steps in their sales careers.

## Personal Development

The new WCSCM gives professionals in the sales ecosystem a description of expected job competencies upon which they can base a solid development plan that may include formal learning, work-based learning, and knowledge sharing. The result is an efficient approach to competency development to enhance current job performance.

## Career Development Planning

Besides helping employees understand competency requirements for their current roles, the new WCSCM provides individuals in the sales ecosystem with insight on the state-of-the-art competencies they need both today and in the near future in order to move their careers forward. By accessing professional and learning opportunities in line with WCSCM-based career paths, professionals in the sales ecosystem can begin to prepare for their next career moves.

## Conclusion

The new WCSCM contains business-essential competencies needed for success both today and in the future and offers benefits for both organizations and individuals. The research methodology for the new model involved an extensive exploration of evolving sales trends that are shaping the sales profession and influencing the competencies needed by sales professionals. Designed to accommodate the variety of trends that challenge today's organizations, the new WCSCM focuses on both applicability and usability, resulting in a model that can be scaled and adapted for use by different types and sizes of organizations as well as individual members of the sales profession.

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