
Assessment 2-1

Sales Gap Analysis—Knowledge

For: _____ Baseline Date: _____

Self-Assessment: Read each item under “Knowledge” in the chart below and mark an “A” in the column that reflects the knowledge and/or behavior you currently demonstrate.

Identify Goal: Review each item and mark a “B” in the column that is your goal for future competency. (*Note:* it is not necessary or practical to set goals for any category with a “6” rating.)

Gap: Now, draw a line between A and B on each item, illustrating the gap.

Action: Select the items that you would like to improve on and put a checkmark in the first column beside each choice. Write the bullet points of your learning plan in the space provided.

Going Forward: Check your progress monthly.

Rating Key:

1 = THIS IS NEW TO ME.

2 = I UNDERSTAND AND DEMONSTRATE THIS KNOWLEDGE/BEHAVIOR/SKILL LESS THAN 25 PERCENT OF THE TIME.

3 = I UNDERSTAND AND DEMONSTRATE THIS KNOWLEDGE/BEHAVIOR/SKILL 26–50 PERCENT OF THE TIME.

4 = I UNDERSTAND AND DEMONSTRATE THIS KNOWLEDGE/BEHAVIOR/SKILL 51–75 PERCENT OF THE TIME.

5 = I UNDERSTAND AND DEMONSTRATE THIS KNOWLEDGE/BEHAVIOR/SKILL 76 PERCENT OR MORE OF THE TIME.

6 = I USE THIS KNOWLEDGE/BEHAVIOR/SKILL TO ENHANCE CREATIVITY/ADAPTABILITY AND TO CREATE HIGHER STANDARDS.

✓	KNOWLEDGE	1	2	3	4	5	6
	1. I have effective product/service knowledge so I can develop solutions/benefits for my customers.						
	2. I have effective competitor knowledge to offer implications and options to my customers so they can make informed decisions.						
	3. I have effective customer/market knowledge so that I do not waste my customers' time by asking questions for information that is readily available.						
	4. I have effective company knowledge so that I can represent our organization's values/mission and sell products at a profitable level.						

Learning Plan:

Assessment 2-2

Sales Gap Analysis—Sales Mind Focus

For: _____ Baseline Date: _____

Self-Assessment: Read each item under “Sales Mind Focus” in the chart below and mark an “A” in the column that reflects the knowledge and/or behavior you currently demonstrate.

Identify Goal: Review each item and mark a “B” in the column that is your goal for future competency. (*Note:* it is not necessary or practical to set goals for any category with a “6” rating.)

Gap: Now, draw a line between A and B on each item, illustrating the gap.

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✓	SALES MIND FOCUS	1	2	3	4	5	6
	1. I separate fact from assumptions and opinions.						
	2. I review my assessments by rigorously analyzing data, assumptions, and concerns for the purpose of taking effective action.						
	3. Using sales mind focus thinking skills, I develop effective strategies for my accounts.						
	4. Using strategic thinking skills, I prepare for all of my interactions with customers.						

Learning Plan:

Assessment 2–3

Sales Gap Analysis—Managing Tasks and Relationships

For: _____ Baseline Date: _____

Self-Assessment: Read each item under “Managing Tasks and Relationships” in the chart below and mark an “A” in the column that reflects the knowledge and/or behavior you currently demonstrate.

Identify Goal: Review each item and mark a “B” in the column that is your goal for future competency. (*Note:* it is not necessary or practical to set goals for any category with a “6” rating.)

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✓	MANAGING TASKS AND RELATIONSHIPS	1	2	3	4	5	6
	1. I make sure my activities support the tasks and relationships appropriate for each of my accounts.						
	2. I regularly assess my relationships with my accounts so that I minimize time spent repairing relationships.						
	3. I align my style and my offer to each customer’s style and situation.						
	4. I regularly show appreciation to my customers beyond the sale or task.						

Learning Plan:

Assessment 2-4

Sales Gap Analysis—Conditions of Satisfaction

For: _____ Baseline Date: _____

Self-Assessment: Read each item under “Conditions of Satisfaction” in the chart below and mark an “A” in the column that reflects the knowledge and/or behavior you currently demonstrate.

Identify Goal: Review each item and mark a “B” in the column that is your goal for future competency. (*Note:* it is not necessary or practical to set goals for any category with a “6” rating.)

Gap: Now, draw a line between A and B on each item, illustrating the gap.

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✓	CONDITIONS OF SATISFACTION	1	2	3	4	5	6
	1. I clearly define and capture explicit conditions of satisfaction.						
	2. I uncover implicit conditions of satisfaction.						
	3. I verify conditions of satisfaction with my customers.						
	4. I use conditions of satisfaction to drive my offers.						

Learning Plan:

Assessment 2–5

Sales Gap Analysis—Listening, Inquiry, and Advocacy

For: _____ Baseline Date: _____

Self-Assessment: Read each item under “Listening, Inquiry, and Advocacy” in the chart below and mark an “A” in the column that reflects the knowledge and/or behavior you currently demonstrate.

Identify Goal: Review each item and mark a “B” in the column that is your goal for future competency. (*Note:* it is not necessary or practical to set goals for any category with a “6” rating.)

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✓	LISTENING, INQUIRY, AND ADVOCACY	1	2	3	4	5	6
	1. I use effective questions to uncover and understand my customers' conditions of satisfaction, concerns, needs, and motivation.						
	2. I craft questions that evoke comfortable disclosure of facts and feelings.						
	3. I frame linking questions that deepen dialogue.						
	4. I listen with empathy for unspoken concerns and implicit conditions of satisfaction.						
	5. I clarify word traps and other potential misconceptions to help stay in alignment with my customers.						
	6. I advocate my opinions in alignment with my customers' concerns and conditions of satisfaction.						

Learning Plan:

Assessment 2–6

Sales Gap Analysis—Communicating

For: _____ Baseline Date: _____

Self-Assessment: Read each item under “Communicating” in the chart below and mark an “A” in the column that reflects the knowledge and/or behavior you currently demonstrate.

Identify Goal: Review each item and mark a “B” in the column that is your goal for future competency. (*Note:* it is not necessary or practical to set goals for any category with a “6” rating.)

Gap: Now, draw a line between A and B on each item, illustrating the gap.

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✓	COMMUNICATING	1	2	3	4	5	6
	1. I craft messages that add value for my customers and conform to my company's brand and style.						
	2. I customize my communication with consideration of my customers' style and our relationship.						
	3. I actively practice the use of professional, positive, and authentic language.						
	4. I am disciplined in my approach to proofreading and dispatching communications.						
	5. My communications are focused on my customer.						

Learning Plan:

Assessment 2–7

Sales Gap Analysis—Benefits

For: _____ Baseline Date: _____

Self-Assessment: Read each item under “Benefits” in the chart below and mark an “A” in the column that reflects the knowledge and/or behavior you currently demonstrate.

Identify Goal: Review each item and mark a “B” in the column that is your goal for future competency. (*Note:* it is not necessary or practical to set goals for any category with a “6” rating.)

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✓	BENEFITS	1	2	3	4	5	6
	1. I develop and update a repertoire of refined benefit statements that are easily customized.						
	2. My benefit statements are customized and create impact.						
	3. I link benefits to my customers' explicit and implicit conditions of satisfaction.						
	4. I quantify the impact of the benefits and solutions that I offer.						
	5. I use credible proof.						

Learning Plan:

Assessment 2–8

Sales Gap Analysis—Networking

For: _____ Baseline Date: _____

Self-Assessment: Read each item under “Networking” in the chart below and mark an “A” in the column that reflects the knowledge and/or behavior you currently demonstrate.

Identify Goal: Review each item and mark a “B” in the column that is your goal for future competency. (*Note:* it is not necessary or practical to set goals for any category with a “6” rating.)

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✓	NETWORKING	1	2	3	4	5	6
	1. I create and evolve a networking strategy.						
	2. I devote adequate time and energy to cultivating my network.						
	3. I find creative ways to disperse value to my network.						
	4. I am involved in community activities and community building.						

Learning Plan:
