

# How to create a sales competencies assessment

Sales competencies are the skills and traits that your reps either possess, or do not.

A sales competencies assessment is a useful tool which allows you to see where your reps need to develop. Additionally, it provides a lens through which you can analyze the impact of your training programs to see if you've been achieving the goals you set.

A sales competencies assessment ultimately provides you with an effective way of measuring your reps and seeing where skill gaps lie.

Every organization will have unique skills, abilities, and competency needs so make sure you tailor the assessment to suit your aims. As well as that, regularly review your assessment framework to make sure it's still measuring and analyzing your reps in the way you need.

We realize that creating a sales competencies assessment framework from scratch might seem daunting at first, so we've put together a quick how-to guide to get you started on the right track:

Step	Why and how do I do this step?
<b>Step 1:</b> <b>Identify the competencies needed for the roles you want to measure</b>	<p>The very first step isn't as straightforward as it seems. You need to look at all of the roles you want to assess, and consider the competencies you want to measure.</p> <p>Remember to define these clearly, as well as the metrics you'll use to measure them.</p> <p>Ultimately, your reps should be able to</p>

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examine the list of competencies and understand each one, as well as what improvement means in that area.

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**Step 2:  
Share your results from step 1 with others  
in the organization**

Creating a sales competencies assessment can't be an individual process.

Ask sales managers, top-performing reps, and others in the organization to suggest what the key competencies are for these roles. Use questionnaires even! The goal is to help benchmark your reps' skills and help them improve, so asking them can be enlightening.

Best of all, this will make the process a team effort, rather than the sales enablement department 'imposing' assessments onto the team.

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**Step 3:  
Examine the competencies that you've  
selected and assess whether they align  
with the sales strategy**

So, you've determined which skills, abilities, and competencies you need to measure in order to assess performance. You've collaborated with the rest of the sales organization on this. What now?

Before you dive into developing an assessment, review the competencies you came up with.

Do they align with the overarching sales strategy? Are there skills that you didn't account for? Do you think your reps need an additional skill set that isn't being used right now?

These are all things to consider after you've completed your initial observation.

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**Step 4:**  
**Ensure you have a streamlined, efficient way of delivering the assessment**

While it may be tempting to get your reps to self-assess on paper and then work out their progress by hand yourself, this is time-consuming and inefficient.

At the minimum, use your spreadsheet platform of choice so that you can automate formulas and calculations, and track numbers and progress with ease.

Additionally, there are sales competency training platforms available to sales enablement professionals on the market. Doing your due diligence and researching which of these could be appropriate for your organization

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**Step 5:**  
**Encourage the organization to embrace the assessment when you launch it**

Adoption of the framework will ultimately be your sink-or-swim moment. Without buy-in, you'll likely fail no matter how much you want the launch to succeed.

Therefore, communication with the reps is key in the leadup to, during, and after the launch of the framework. They need to feel as if their voice is heard and that they want to do this. The last thing you want is for reps to feel like they're being forced into doing this.

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**Step 6:**  
**Build your enablement, learning, and development programs around the assessment results**

Once you've achieved the buy-in from the previous step, it's vital that you capitalize on this.

If done right, you'll have created an environment where improvement is desired, so build your programs around that. Give your reps the opportunity to grow and develop in a self-driven fashion.

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**Step 7:  
Utilize the full potential of the  
competencies assessment**

The assessment will provide your department with a list of the core skills and competencies that you require from your sales reps, and exactly how good each rep is at that competency.

This is not the time for a one-size-fits-all solution. You have the potential to tailor training and development to very specific skill gaps.

Additionally, if your reps are all strong in a certain area, you can divert some focus away from development there.

This assessment gives you insights and the potential for focused, flexible rep development so don't be afraid to make use of that with really unique training.

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**Step 8:  
Encourage by highlighting strengths as  
well as weaknesses**

This is less of a step, and more of an overarching theme, but it's just as important as the other steps.

You cannot focus solely on the 'negative' or 'needs improvement' side of the assessment results. Make sure you recognize and highlight when reps are performing well, otherwise you risk creating a negative atmosphere and lowering the morale of the team.

No one just wants to hear where they need improvement, everyone likes some well-deserved praise!

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P.S. We've got a whole course on perfecting your [sales training skills](#). Why not check it out?