



Success Profiles & Assessments for Field Sales Roles

Executive Summary

This research looks at the typical competencies and success profiles for Field Sales Roles in market-leading organizations across 5 commercial sectors. What was noticeable in the research was that sales and relationship roles typically had overlapping duties.

In modern times, perhaps in response to the diversification of the product/service landscape and the constant re-engineering of business process and teams, sales roles have become more flexible and customized.

Rather than sales and relationship management roles being separate, there exists a spectrum with appointment driven sales at one end and relationship-driven sales at the other end.

Many of the sales roles surveyed appeared around the middle of this sales vs relationship management spectrum.

These days both sales and relationship managers are targeted and are expected to deliver revenue via a sales forecast or account development plan respectively.

While relationship managers use skills in relationship management, they also need to soft-sell via cross-selling and up-selling. Selling via cold-calling is more exclusive to sales types roles, but many sales reps were also expected to have the ability to sell in a relationship driven way.



ADP. Consistently named one of the 'Most Admired Companies' by FORTUNE® Magazine, and recognized by DiversityInc® as one of the 'Top 50 Companies for Diversity,' ADP works with more than 740,000 organizations across the globe to help their people work smarter, embrace new challenges, and unleash their talent.

This ADP job description was selected as a financial services/tech example because it has a clear success profile and competencies. This is a field sales role which has a good emphasis on relationship management too, particularly as their products/solutions are being sold consultatively into the typically conservative payroll and HR functions primarily.

Major Markets Sales-(Outside Sales)

ADP is hiring ...

Does this sound like you?

- Fearless. Embraces opportunities and challenges the status quo
- Go-getter and self-Starter. High-reaching and unstoppable. A can't-stop-won't-stop attitude and an urge to persevere until you get it right.
- Trusted Advisor. Lives integrity and delivers on promises...every time
- Passionate advocate. Strengthens relationships and builds advocacy while delivering measureable results

Well, then you might be just the person we're looking for. #HelloWork

Every day, our extraordinary Sales team gains client and prospect's trust and establishes long-term partnerships. As a Major Accounts Broker District Manager, you will help employee benefits brokers and your brokers' clients grow — with custom Human Resource solutions built on smart technology, superior service, and data. You'll collaborate with internal and external partners, strategically profile and hunt for new business, independently manage a full sales cycle, and accurately forecast sales while managing a pipeline to meet and exceed your assigned quota.

Things you'll do (Responsibilities)

Drive our Business Forward

- Work within a geographic territory to close sales, win business, and reach sales goals
- Engage and collaborate with external Employee Benefits Brokers to gain referrals while providing additional services to their clients

Turn Prospects into Loyal Clients and Raving Fans

- Host collaborative meetings, educational webinars, and seminars with local partners
- Implement a top-down sales strategy targeting Presidents, CEOs, CFOs and Owners to build a network with C-level executives. Now that's what we call networking

Deepen Relationships across the ADP Family

In addition to cloud-based HR solutions, strategically cross-sell with other ADP associates by putting the spotlight on ADP's shiny, new products and solutions.

Collaborate daily

- Serve as a trusted advisor to your clients
- Develop and maintain relationships with other internal groups within the territory

Experience you need (Required Qualifications)

- Associates or Bachelor's degree
- 2+ years of quota carrying, outside business-to-business sales experience
- An impressive track record of closing sales, winning clients, and managing a territory, as well as stellar presentation skills

Bonus points for these (Preferred Qualifications)

- 3-10 years of relevant experience in HCM, technology, business equipment, uniform or software sales
- Ambitious spirit, with demonstrated ability to exceed sales quotas
- Established network contacts
- Ability to cold call with assertive, positive and persistent style
- Organized, with time management skills
- Ability to communicate effectively (verbal, listening, and written)
- Thrives under pressure



Bayer. They are at the forefront of digitization and innovation in the sales process. Bayer Crop Science recently digitally transformed its operation and drove innovation within the business. They focussed on a world-class integrated customer experienced which led to high adoption rate, considerable increase in royalty sales incomes and substantial increases in sales orders. www.salesforce.com/video/3632191

This Bayer job description was selected as a pharmaceutical example because again there is a good emphasis on relationship management too. It's value-based sales based on trust, selling crop protection products. Bayer's Life Values are referenced in the job description and these have been included at the end of this entry.

Field Sales Rep II - North Texas

As a Crop Protection Field Sales Representative you will be responsible for growing the market share of crop protection business within Northern Texas (17 counties North of Amarillo) and the Oklahoma Panhandle. In his position, you will create demand for Bayer seed growth and crop protection chemistry products through retailers, dealers, and top growers.

Primary responsibilities of this role, Field Sales Rep II:

- Develop and implement dealer business plans, manage forecasting, inventory management and product line demand issues, set the business direction, and coordinate follow-ups with dealers
- Serve as the key business consultant to retailers and dealer and effectively sell the value of Bayer Crop Science products
- Demonstrate proof of product performance against the competition by being the champion of Bayer brands and product/technical/agronomic knowledge
- Collaborate with Bayer Agronomists and Technology Development Representatives (TDR) to maximize services, information, and sales to preferred growers desiring extensive technical/agronomic expertise
- Partner and manage the relationship with top growers, act as the business expert for top growers, and negotiate and plan for customer needs (handle product performance inquiries, establishment of customer trial/plot plans, and coordination of plot tours with key customers)

Who You Are

Your success will be driven by your demonstration of our LIFE values. More specifically related to this position, Bayer seeks an incumbent who possesses the following:

Required Qualifications:

- Minimum of three years of experience in Sales, marketing, account management or agriculture
- Excellent communication skills (interpersonal, oral and written)
- Demonstrated self-motivation, initiative, assertiveness, and results orientation
- Strong business acumen, account planning, influencing and critical thinking skills
- Financial, time, and territory management proficiency
- Proven ability to multi-task in a rapid-paced and matrixed environment
- Strong computer and presentation skills (proficiencies in Word, Excel, PowerPoint, Outlook)
- Demonstrated digital acumen and ability to analyze data to influence decisions
- Willingness to travel and live/work in a rural environment
- Ability to pass driving record background check (i.e. moving violations, accidents, License suspension, etc.)

Preferred Qualifications

- Bachelor's degree
- Demonstrated product, portfolio and agronomic knowledge
- Domestic relocation assistance may be offered for this role

Bayer's Life Values follow: and this is the success profile for employees

Leadership	Integrity	Flexibility	Efficiency
• Be passionate for people and performance • Show personal drive, inspire and motivate others • Be accountable for actions and results, successes and failures • Treat others fairly and with respect • Give clear, candid and timely feedback • Manage conflicts constructively • Create value for all our stakeholders	• Be a role model • Comply with laws, regulations and good business practices • Trust others and build trustful relationships • Be honest and reliable • Listen attentively and communicate appropriately • Ensure sustainability: balance short-term results with long-term requirements • Care about people, safety and the environment	• Drive change actively • Be ready to adapt to future trends and needs • Challenge the status quo • Think and act with customers in mind • Seek out opportunities and take calculated risks • Be open-minded • Embrace lifelong learning	• Manage resources smartly • Focus on activities that create value • Do things simply and effectively • Deliver with appropriate costs, speed and quality • Speed up good decision-making • Be accountable for consistent execution • Collaborate for better solutions



Shell. Their sales and relationship management process is being stress-tested by its transformation and growth strategy. Global Commercial (GC), Americas is leading a transformational business growth agenda. The GC B2B business is a key Accelerated Growth strategic lever and aspires to double its bottom-line results by 2025. Accelerating lubricants growth in certain resilient sectors has been identified as a foundation for our growth. They are looking to bring on new sales talent to maintain and develop existing B2B customer relationships.

This Shell job description was selected as a good oil and gas sector example because again there is a good emphasis on relationship management too. It specifically references sales AND account management in the second paragraph of the role summary.

Field Based Account Manager - Northern Ohio/Michigan

Where you fit

Global Commercial (GC), Americas is leading a transformational business growth agenda. The GC B2B business is a key Accelerated Growth strategic lever and aspires to double its bottom-line results by 2025.

Accelerating our lubricants growth in certain resilient sectors has been identified as a foundation for our growth. We are looking to bring on new sales talent to maintain and develop existing B2B customer relationships. The role will specialize in sales and account management in the heavy industry sectors.

What's the role?

- Qualified candidates will have proven sales track record and be able to identify, qualify, negotiate and win new business, delivering volumes and margins in line with businesses objectives and sector strategies
- Strengthen SOPUS brands and increase market share in respective territory
- Provide high level support to Key Accounts in both OEM and Sectors, including but not limited to Local and global key accounts
- Work closely with distributors on our delivery promise in terms of service of existing and onboarding of new customers

Accountabilities

- Fill pipeline with qualifying accounts, identify these accounts through cold calling, networking and business journals
- Exceed team and individual KPIs as set by the leadership team. Be proactive in building an action plan and prioritizing time and activities to deliver against financial targets
- Plan customer calls and visits to provide the appropriate level of service to existing and new customers with

a focus on retaining/expanding existing business relationships and acquiring new business relationships

- Increase the value for existing Shell customers through cross, range and up selling
- Understand the activity, business and needs of customers, provide sound information and advice on products and services, and to sell and negotiate win-win solutions with customers

Requirements

- Must have legal authorization to work in the U.S on a full-time basis for anyone other than current employer
- Bachelor's degree in a technical discipline is preferred
- Minimum 5 years of sales experience dealing with complex & multi-site corporate accounts
- Proven track record of delivery in a B2B/B2C sales environment
- Current experience and relationships with B2B companies in the US is preferred
- Commercial instinct and strong customer orientation
- Excellent interpersonal skills; including experience of and ability to build and manage high-level relationships within large global, complex accounts
- Solid working knowledge of technical applications, CVP's and troubleshooting capabilities
- Ability to manage interfaces and relationships within a B2B environment both internally and externally
- Previous experience developing and negotiating multi-year sales agreements
- Previous experience negotiating independent dealer contract renewals
- Roughly 50% overnight travel required (Depends on territory)

J.P.Morgan

***JP Morgan** leads across capital markets and FICC. It is a powerful force in equities and advisory. It has built impressive franchises in areas such as transaction services. All the parts are there, but the sum of them makes JPMorgan the clear number one firm in the industry, perhaps to an extent that no bank has been before. It's the number one ranked investment bank by revenue. JP Morgan has been built and sustained over many years and through different phases of crisis, recovery, coordinated global growth and, more recently, returning macro uncertainty.**

This JP Morgan job description was selected as a good financial services sector example to provide some insight into senior field sales. It is a sales heavy role but there is also a strong relationship management component as reflected under the Portfolio Management section.

**Euromoney, July 10, 2019, Award For Excellence 2019: JP Morgan.*

Field Sales Management Director

Description

The role of the Middle Market Commercial Card Regional Manager, is responsible for managing a Field Sales team of up to 10 sales professionals driving commercial card growth by selling card solutions to business (companies with annual sales revenues between \$5M and \$500M) in a defined territory. Regional Manager candidate must have a strong track record of leading a Sales team in the Financial Services industry and a proven record of successful selling. A strong history of building internal and external strategic selling networks will be key to your success. She/he will be a master of all aspects of direct selling including developing national relationships for lead generation. In addition, will be responsible for establishing solid partnerships with other JPMorgan Chase businesses in your region to identify and close cross-sell corporate card opportunities.

Responsibilities include:

- Liaise with local Commercial Bank Senior Management and C-Level Partner Contacts to develop and execute Corporate Card sales strategy
- Lead and motivate sales team to deliver on business growth objectives through direct/joint calling efforts, providing real time coaching opportunities

Direct Sales Efforts

- Achieve aggressive Card sales goals with the team through a focus on new business to the

firm via new clients, cross-selling and expansion in the client base

- Cultivate larger prospect relationships that are regional/national in scope
- Have proven skills in calling into the C-Level suite with proven confidence and success

Portfolio Management (Book of Business)

- Collaborate with sales team, Portfolio and Product, to ensure retention, revenue growth and relationship management of portfolio clients
- Responsible for helping create client account plans for reviews to produce meaningful growth of client's utilization and realization of spend targets

Technical Skills

- Previous Card Industry sales expertise in Purchasing, T&E and Accounts Payable spend
- Knowledge of electronic payment options including Card, Single Use, Order-to-Pay, etc.
- Knowledge of security, compliance, fraud liability, AML, etc., to enforce appropriate safeguards
- Ensure accurate and timely reporting using Microsoft suite as well as CRM tool
- Recruit, train, lead, coach, and motivate field sales managers
- Analyze and leverage data to uncover growth opportunities and implement growth strategies
- Develop, monitor and analyze performance metrics to evaluate regional effectiveness relative to key metric performance and goals
- Implement strategies and tactics to improve performance, efficiency and partner service
- Demonstrate exceptional leadership, follow-up and project management skills
- Lead/execute special projects and assignments as required
- Strong controllership skills including managing to expense policies and adherence to process policies and procedures

Qualifications

- Bachelors Degree, MBA or Masters preferred
- 5-10 years of regional sales management in an outside business to business sales environment with a documented track record of success / top performance

- Excellent selling, influencing and negotiation skills
- Strong ability to effectively communicate (oral and written) with multiple levels of the organization (internally and externally)
- Past experience in customer-focused role of understanding/servicing customers needs; building trust and rapport with the customer; adapting approach that mirrors customers' culture/environment; and developing strategies to add value to the customer
- Capable of solving business problems and provide workable solutions through logical and systematic approaches
- High level of integrity, energetic, competitive and goal-oriented; highly motivated; outstanding interpersonal, time management and leadership skills
- Proven expertise in developing relationships from a cold call, networking activity, or business partner referral
- Knowledge of credit card industry, banking environment, or merchant services is preferred, but not required
- Available for extensive travel (50%-75%)
- Sense of urgency for goal achievement, strong commitment to driving sales results
- Exceptional presentation skills are mandatory-ability to flex style to audience
- Computer skills necessary - Word - Excel - PowerPoint - Outlook

Honeywell

Honeywell. For the 13th consecutive year, Honeywell has been selected as one of the "World's Most Admired Companies®" by FORTUNE Magazine. Leading the list for the third year of most admired companies in the electronics industry, Honeywell ranked first overall with a score of 7.17, up from 7.13 in 2018. Within the electronics industry, Honeywell received first place rankings in reputation attributes for use of corporate assets, social responsibility, quality of management, financial soundness and long-term investment. Honeywell ranked second place in innovation, people management, quality of products / services and global competitiveness.

www.honeywell.com/en-us/newsroom/news/2019/01/honeywell-tops-electronics-industry-on-the-fortune-2019-worlds-most-admired-companies

This Honeywell job description was selected as good aviation and engineering services sector example to provide some insight into senior field sales. There is again a good balance of sales and customer relationship management.

Sr Outside Sales Representative

We are seeking an experienced Sales Professional with proven results. This position is responsible for managing all aspects of engagements with existing and new customers for our organization. You will build relationships and understand customer business in order to provide appropriate products or solutions. You will define sales and growth strategy toward key customers while aligning with critical sales business objectives. You will identify opportunities and build credibility with customers. Utilize your product knowledge to deliver the value proposition to the customers.

Key Responsibilities

- Forecast sales from assigned accounts 6 to 12 months into the future and deliver on resulting annual targets
- Manage customer relationships and coverage by sharing information and developing account plans throughout Honeywell
- Lead opportunities through the entire sales cycle: Identify opportunity, clarify bid, develop sales strategy, enroll and aligning sales support, submit proposal, close the deal, work with order management, production planning and service to make, deliver and service the product
- Support Business and Technology functions by providing market and competitor intelligence
- Maintain all internal work and sales processes, e.g. customer relation management tools
- The ability to travel 50% annually. Accounts are expected to be in MN, WI and potentially IA

Must Have

- BS degree in Engineering or Business Technical
- Minimum of 5 years day-to-day operating experience in a customer-facing sales or sales support role
- Minimum of 5 years' experience in the industrial space (ex. Pharmaceutical, Refining, Oil, Gas, Metals & Mining, Chemicals, Pulp & Paper, Manufacturing, IoT)

We Value

- Engineering Degree
- 10 or more years of direct product sales and/or sales support experience is preferred
- Software sales experience; Complex sales experience
- Demonstrated ability to sell into a competitive market place and achieve premium prices by communicating the value achieved by the customer using Honeywell products and services
- Experience using SalesForce.Com (SFDC) and Altify for Account Planning
- Good listening and communication skills
- The ability to work effectively with other sales colleagues and sales support functions is key
- A strong customer and business focus

Appendices

Contacts

1. Bayer worked with [Salesforce and Fujitsu](#) to help connect to its partners in a revolutionary way. Bayer Crop Science digitally transformed its operation and drove innovation within the business. They focussed on a world-class integrated customer experience which led to high adoption rate, considerable increase in royalty sales incomes and substantial increases in sales orders.
www.salesforce.com/video/3632191/
2. Phillips worked with ETS to develop their employees through a competency framework and assessment programme: www.etsplc.com/wp-content/uploads/2016/11/ETS_Case_study_Philips_TCA_FINAL.pdf
3. Sodexo have introduced a competency model for sales executives and sales VPs. The Competency Model guides recruitment, hiring, performance management, talent review, training, and development here at Sodexo. At the core of the competency wheel are the competencies that all of our managers need to achieve excellence on the job. Around the outside of the wheel are competencies that are needed for success in specific positions.
[www.us.sodexo.com/files/live/sites/sdxcom-us/files/050C_Country.com_USA_\(English\)/Building_Blocks/LOCAL/Multimedia/OnboardingPortal/Site_Files/Competencies_of_a_Sales_Executive_or_Sales_Vice_President.pdf](http://www.us.sodexo.com/files/live/sites/sdxcom-us/files/050C_Country.com_USA_(English)/Building_Blocks/LOCAL/Multimedia/OnboardingPortal/Site_Files/Competencies_of_a_Sales_Executive_or_Sales_Vice_President.pdf)