



User Manual

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INTRODUCTION

The Sales Aptitude Inventory (SAI) is designed to assess the attitudes and values that underpin sales effectiveness.

Helping customers to buy products and services is a pivotal role in nearly every commercial organization, large or small. The context of the customer dialogue may vary (eg face-to-face, over the telephone, online) as will the product or service being sold, but the effective handling of these vital interactions usually requires a particular set of skills and behaviours.

Effective salespeople seek to influence the outcome of the conversation – they believe they can make a difference, adding value to the customer through the sales process. The best performers tend to enjoy selling, identifying with sales as an important and worthwhile job function. Behind these motivations sit other important dimensions that determine effectiveness including confidence, being organized, being willing to operate within ethical and regulatory principles, and of course a level of resilience.

The *SAI* has been designed specifically to measure these critical performance dimensions. It was developed in partnership with leading sales organizations. The *SAI* has been built upon rigorous analysis of the actual behaviours that distinguish the best sales people. In choosing to use the *SAI*, you are deploying a tool that will add considerable value to your selection and assessment activities.

WHEN TO USE THE SAI

2.1. Selection

The decision to hire someone has great significance for both the organization and individual. For most businesses, the supply of customer orders is the lifeblood of the organization. Sales staff are often the first point of personal contact with the customer. If these moments of truth are handled effectively, they can blossom into mutually beneficial relationships for both customer and supplier. If mis-handled however, the lead can be lost, and worse, the organization may suffer reputational damage. The attitudes and values that underpin effective sales relationships are the qualities assessed by the SAI.

The SAI has been designed to be used as either a screening tool or a selection aid alongside the interview. Where very high volumes of applicants have to be managed, the SAI provides a robust, inexpensive and effective way of identifying the most suitable applicants for interview. Alternatively, the SAI can be used to deepen the interview experience with candidates. This is because it provides interviewers both with a succinct verbal report and helpful probe questions.

2.2. Development

When used discerningly, an SAI report can form an excellent basis for a discussion about an individual's strengths and development needs. The test can play a useful role in training courses, coaching, mentoring and other learning interventions. It can also be used in career counselling sessions, for example, to give participants insight into the likely challenges and rewards of a sales role.

2.3. Caution: Using the SAI Wisely

Tests should only form part of an overall selection decision. It is important to take into consideration other factors such as previous work history, academic or vocational qualifications, and information from other sources such as interviews and references.

When a tough decision has to be made, especially one that impacts negatively on others in the workplace, it can be tempting to look for a tool or a process to make this decision for you. In these circumstances, psychometric tests are a poor substitute for an open, honest conversation as part of a broader performance management dialogue.

To be clear, psychometrics such as *SAI* can play an important part in helping to identify who, for example, is most equipped to make the transformation to a new role or a new way of working. Wherever possible, however, it should be used alongside other relevant sources of data about the person to help reach a balanced, fair conclusion.

2.4. Legal and Professional Considerations

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