

# Foundation Interview

*(purpose: to clearly understand what a rep wants, their motivations - their "why," their development needs - "what," and support or training wants - "how" - and any personalized approach, method and culture with necessary coaching actions and attitudes)*

Date: \_\_\_\_\_

Sales Rep: \_\_\_\_\_

Sales Leader: \_\_\_\_\_



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COACHING PEOPLE FROM GOOD TO GREAT

# Foundation Interview (for Sales Leaders/Coaches)

**Rep Name:** \_\_\_\_\_ **Tenure:** Years/months \_\_\_\_\_

## **Approach**

*Seek to understand the rep. Adopt a nonjudgmental attitude and a desire to benefit the other person by knowing their motivations, strengths and support needs. LISTEN. Plan to take action and to help each person reach their goals and have higher job satisfaction.*

## **Sales (communication) Style of Person** (if available)

Dynamo \_\_\_\_\_ Thinker \_\_\_\_\_ Socialite \_\_\_\_\_ Performer \_\_\_\_\_

## **CTS SaleProfile - Primary Traits** (if available)

Deadline Motivation \_\_\_\_\_

Recognition Drive \_\_\_\_\_

Assertiveness \_\_\_\_\_

Independent Spirit \_\_\_\_\_

Analytical \_\_\_\_\_

Compassion \_\_\_\_\_

Self-Promotion \_\_\_\_\_

Belief in Others \_\_\_\_\_

Optimism \_\_\_\_\_

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## **General Information**

- 1. What's in your past or previous employment that relates to understanding sales and general business practices?*
  
- 2. Please describe our company and its culture. (anchor) What do you like best about it? What changes would you like to see? What could you do to help it move in that direction? How will these changes and your part in them impact you, customers or other reps?*

## **General Information (cont.)**

3. *What is the purpose of your sales position here? Then ask, "Any other important purposes?"*

## **Perceptions of Self**

4. *What type of people do you get along with best (specific traits)? How do your closest friends describe you?*

5. *What are your three most important strengths? What do you do best?*

6. *What are your three most important areas for development? How do they impact achieving your sales or income goals?*

- *What are you doing to grow in these areas?*

7. *What is the single issue that keeps you from achieving your maximum potential? (anchor)*

- *What are you doing or plan to do to develop past this?*
- *How will your growth help you?*
- *What do you want me to do?*

8. *How would you describe your most important accomplishment to date? (anchor)*

- *Why did you chose that one?*
- *How does that affect or impact your life today?*

## **Motivations and Goals**

9. *How motivated are you on a scale of 1-10? (anchor) How can you increase your motivation and satisfaction at work? Why would this help?*

## **Motivations and Goals (cont.)**

10. *What are the three most important things in your life in order of priority? (anchor)*  
(note: be sure to ask about the names significant people mentioned in their answer)
- *How does \_\_\_\_\_ (insert one of them) relate to the amount of sales or income you strive to achieve or earn? (ask about other relationships to sales or income targets based on their answer to the anchor question)*
  - *What if you don't achieve your goals each month - what will happen?*
11. *What's your survival income - just pay the bills - goal each month? What is your actual goal - the one that's beyond just survival? (anchors)*
- *Why is that important to you?*
  - *Are you more motivated by income for \_\_\_\_\_ (add what they just said) or are you more motivated to beat someone or be recognized at a certain level.*
  - *(If they say "beat someone or recognized at a certain level) Ask, Who or what level?*
12. *What percentage of your time each day that you work is spent face-to-face or on the phone with customers or prospects? (anchor)*
- *What can you do to increase this percentage?*
  - *How would that help you reach your goals?*
13. *Who has had the most important positive impact on your life to date? (anchor)*
- *Please explain how?*
  - *How does this impact your life today?*
  - *What do you do to help those around you in a similar manner?*

## **Sales Skills**

14. *Please explain the steps to take when first meeting a prospective new customer until after a sale is completed?*
15. *How would you handle a person who is irate?*
16. *When selling face-to-face what is a salesperson's most important skill? Why? How does this help?*
17. *What attributes contribute to long-term sales success (high sales) with low return rates and lots of referrals and repeat customer purchases.*
18. *How do you want your customer to remember you? What percentage of your business do you want from referrals and repeat sales?*

## **Planning and Activity Tracking**

19. *Describe a typical day in sales? What is the most important activity to do when not in front of a prospect or a customer?*
20. *How many new appointments do you set or try to set each week? How do you self-discipline yourself to get this done?*
21. *How do you keep track of your things to do each day? What system do you use?*

## **Support Expectations and Concerns**

22. *What additional training do you want to help you achieve your goals? How will this help?*
23. *What are the main issues or problems that keep you from performing your best?*
24. *What would you list as the three most important attributes of a good sales leader? (anchor)*
  - *What would be the three attributes in a sales leader that would hinder you most?*
  - *What do you want me to do for you to help you achieve your goals?*