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The *PROFILE* Sales Assessment

CPSA Templates for Sales Personnel*

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Major/Key Account Representative*

- Under minimal supervision, develops, maintains and expands national customer accounts throughout the country/assigned territory/market segment.
- Establishes effective working relationships with the purchasing decision-makers at customer accounts.
- Develops and implements sales strategies, calls on customers, presents new concepts/products and ensures adequate sales service.
- Counsels and advises management on market trends and competitive activity encountered in the field.
- Supports company-wide efforts to increase sales volume and profit margins from assigned national accounts.
- **Compensation:** salary plus performance bonus/commission.

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New Business Development Representative*

- Develops new business areas or markets for the company's products which complement existing company clientele.
- Plans and formulates strategies for winning new business.
- Performs competition analysis.
- **Compensation:** salary plus high commission.

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Senior Sales Representative (5 or more years experience)*

- Promotes/sells/secures orders from existing and prospective customers through a personalized and consultative approach.
- Co-ordinates his/her efforts with company management, marketing, accounting and technical departments.
- Familiarizes established accounts with new products, services and developments.
- Analyzes customer needs and interests.
- Makes telephone, personal calls, presentations to existing and prospective customers.
- Expedites the resolution of customer problems/complaints.
- Keeps abreast of the products, applications, technical service, market conditions, competitive activities, advertising and promotional trends through the reading of pertinent literature and consultation with the marketing and tech services departments.
- Participates in trade shows and conventions.
- Prepares price quotations, terms of sale, delivery dates and service obligations.
- Submits periodic reports detailing sales activities/sales volumes/expenses.
- **Compensation:** salary plus commission (50/50% to 70/30%).

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Intermediate Sales Representative (between 2-5 years experience)*

- Promotes/sells/secures orders from existing and potential customers.
- Familiarizes established accounts with new products, services and developments (market penetration).
- Co-ordinates sales efforts with management and other internal departments.
- **Compensation:** salary plus commission.

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Junior Sales Representative (under 2 years experience)*

- Promotes/sells/secures orders from existing and prospective customers through a personalized and consultative approach.
- **Compensation:** salary plus commission.

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Technical Sales Representative*

- Becomes involved with existing and prospective customers in evaluating the use of company products for their applications.
- Informs new and existing customers of product changes and production requirements.
- Maintains current job skills in product design, product application, pricing, knowledge of system, and all phases of the Industry; develop personal skills to more effectively carry out assigned responsibilities.
- Performs service seminars on all company products and attends trade shows as required to answer customer inquiries.
- **Compensation:** high base salary plus commission.

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Outbound Customer Service Representative*

- Develops new customer accounts by marketing company product lines and offering value-added services to existing customers and prospects.
- Provides new and current customers with product information including pricing, delivery, inventory stocking and/or backorder availability.
- Maintains and grows current sales through proactive calling.
- Solicits business in those areas where the company has little or no sales coverage and responsible for meeting or exceeding outbound sales call/new account goals.
- **Compensation:** base salary with commission.

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Inbound Customer Service Representative*

- Receives, processes and verifies the accuracy of customer orders using the company's automated system and customer purchase orders.
- Responds to customer service requests for order changes and communicates changes to appropriate personnel.
- Provides current customers with product information including pricing, delivery, inventory and/or backorder availability.
- Provides administrative support related to preparation of invoices for shipments.
- Provides back-up support to other department members.
- **Compensation:** base salary and low commission.

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Technical Services Representative*

- Delivers comprehensive technical service support for all company products or a specific product line.
- Interacts regularly and directly with customers, end users, distributors, dealers etc., to ensure that products operate properly
- **Compensation:** salary plus incentive.

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Territory Representative*

- Promotes/sells/secures orders from existing and prospective customers within a defined geographic area
- May assume an established territory or been transferred to the territory during a realignment of the salesforce
- Achieves maximum sales profitability and growth in assigned territory by effectively selling the company's products and/or related services.
- Develops personal sales strategy for the company's products and services to achieve maximum penetration in assigned territory.
- Calls upon new and existing customers either in person or via telephone.
- Expedites the resolution of customer problems/complaints.
- Keeps abreast of the products, applications, technical service, market conditions, competitive activities, advertising and promotional trends through the reading of pertinent literature and consulting with marketing and technical services.
- May participate in regional trade shows and other company organized marketing activities.
- Prepares price quotations, terms of sale, delivery dates and service obligations.
- Submits periodic reports detailing sales activities/sales volumes/expenses.
- **Compensation:** Base salary plus commission with potential to earn a bonus.

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Sales Co-ordinator*

- Co-ordinates meeting schedules of the sales and marketing team, including all internal/external meetings.
- Assists in the preparation of sales and marketing materials (e.g. proposals to clients) and co-ordinates production of materials.
- Prepares monthly/quarterly client reporting packages.
- Organizes direct mailing to new/existing and prospective customers.
- Oversees/maintains company database and client files.
- Handles telephone inquiries and general correspondence for sales team.
- Prepares and distributes monthly/quarterly sales and marketing internal reports to management staff.
- **Compensation:** base salary with no commission.

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Independent Sales Agent/Manufacturer's Representative*

- An independent sales agent or manufacturer's representative is an individual working a specific, geographically designated territory or a particular market/customer segment, representing one or more manufacturers and completely controlling their own time and efforts. The responsibilities and obligations between the agent and principle or company are usually outlined in a written contract between the parties.
- **Compensation:** Set commission per sale.

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Sales Engineer

- Generates sales of products and services with the assigned scope of responsibility to achieve business group volume, profitability and growth objectives.
 - Works closely with the sales team as a technical consultant of for the company's technologies during joint sales calls and sales visits.
 - Solves client problems by working closely with other members of the sales team and colleagues from a range of departments such as: research; design; development; production; distribution; quality assurance; as well as senior company managers;
 - Assists in the design, implementation of customized solutions for clients.
 - May lead and oversee projects involving research, design, development and manufacturing areas.
 - Answers technical questions and conducts demonstrations of product expressions and new features to prospects and to various groups within existing customer accounts.
 - Provides technical descriptions and content for proposals in response to RFPs & RFQs.
 - Provides product installation problem resolution and support. Also, provides full technical training of company's product expressions.
 - Gathers ongoing prospect/customer feedback and related information.
 - May negotiate tender and contract terms to meet both customer and company needs.
 - Travels to visit customers, builds rapport to cement the relationship between client and company and to address ongoing service needs.
 - Prepares reports for head office.
 - Takes part in trade shows, conferencing and marketing events
- **Compensation:** Base salary plus bonus and/or percentage of commission.

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