

Sell Success (Entry to Mid-Level) Profile Assessment

The following self-assessment gives you the opportunity to rate yourself on the Sell Success Profile. It is meant to give you a snapshot of your strengths and help you focus on opportunities for improvement.

Complete the self-assessment to conduct a thorough assessment of your strengths and self improvement needs. Rate your perception of how frequently you demonstrate the outstanding behaviors associated with the competencies. For a full description of the behaviors, refer to the Sell Success Profile document.

Once you have completed the self-assessment, determine two or three key areas for development based on your self-assessment (You may also use any other feedback you have received from your manager, team members, or from a feedback tool.) Focus on the behaviors that you rated as “occasionally” and “rarely or never.”

If you'd like a more in-depth assessment, talk to your manager about the value of going through Wells Fargo's INSIGHTS multi-rater assessment process.

Work with your manager and/or your local Learning & Development team to put together your development objectives and a plan to support those objectives.

Sell Profile (Entry to Mid) Self-Assessment

Conceptual Thinking:	<i>Rarely or Never</i>	<i>Occasionally</i>	<i>Often</i>	<i>Usually</i>	<i>Almost Always</i>
I make connections between processes, ideas and concepts.					
I quickly grasp the critical elements and identify underlying issues in sales situations.					
I generate innovative ideas and think "outside the box".					
I identify ways to apply an idea to develop a customer solution.					
I evaluate the potential usefulness of new ideas.					

Knows the Business:	<i>Rarely or Never</i>	<i>Occasionally</i>	<i>Often</i>	<i>Usually</i>	<i>Almost Always</i>
I understand the financial principles applying to my line of business.					
I use an understanding of new and existing products within my business line to create solutions for clients.					
I demonstrate knowledge of Wells Fargo's products and services outside of my line of business.					
I demonstrate knowledge of the products and services offered by the competition.					
I talk to others at Wells Fargo about their work experiences, in order to learn more about how the organization operates.					

Leverages Resources:	<i>Rarely or Never</i>	<i>Occasionally</i>	<i>Often</i>	<i>Usually</i>	<i>Almost Always</i>
I know when to escalate issues or seek assistance to support the customer.					
I manage time effectively to maximize results.					
I use available technology and tools for streamlining processes.					
I quickly learn how to use new technology to service the customer.					
I am able to use appropriate technology (e.g., voice mail, email) to effectively communicate with people across the organization.					

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Relationship Savvy:	<i>Rarely or Never</i>	<i>Occasionally</i>	<i>Often</i>	<i>Usually</i>	<i>Almost Always</i>
I notice and respond effectively to interpersonal cues, while interacting with others.					
I create a positive customer experience through my interactions.					
I take a personal interest in team members and customers by asking about their concerns and interests.					
I develop and maintain good working relationships across the organization, to create a network for the customer.					

Adaptability:	<i>Rarely or Never</i>	<i>Occasionally</i>	<i>Often</i>	<i>Usually</i>	<i>Almost Always</i>
I move comfortably from one project or process to the next.					
I adjust my personal style to accommodate the style of the customer.					
I adapt the use of "road maps" and other sales tools to the needs of the situation.					
I "start fresh" with each interaction, without carrying forward emotional reactions from one situation to the next.					
I adapt easily to changing job requirements.					
I learn from constructive feedback.					

Initiate and Capitalize on Opportunities:	<i>Rarely or Never</i>	<i>Occasionally</i>	<i>Often</i>	<i>Usually</i>	<i>Almost Always</i>
I notice and act on opportunities for sales.					
I use good judgment when taking risks.					
I ask questions to surface additional customer needs.					
I promptly approach customers to present ideas for addressing newly identified needs.					
I take advantage of opportunities to sell others on the benefits of a Wells Fargo relationship.					

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Information Savvy:	<i>Rarely or Never</i>	<i>Occasionally</i>	<i>Often</i>	<i>Usually</i>	<i>Almost Always</i>
I ask thoughtful questions to gather information and insights.					
In my line of business, I know what information to obtain from a potential customer, in order to be able to move forward in the sales process.					
I know when and how to present the customer with information that will have high impact and increase the chances of making a sale.					
I recognize opportunities for sales outside of my line of business and communicate these to other appropriate Wells Fargo sales professionals.					
I notice patterns that may indicate ways to improve products and services and to expand the business.					

Influence and Impact:	<i>Rarely or Never</i>	<i>Occasionally</i>	<i>Often</i>	<i>Usually</i>	<i>Almost Always</i>
I identify and present information or data that will have a strong effect on others.					
I present several different arguments to make the case for a sale.					
I present arguments that address others' most important concerns and issues.					
I involve others in a process or decision, to ensure their support.					
I identify and propose solutions that benefit all parties involved in a situation.					
I carefully plan and tailor my words in ways that achieve a desired impact.					

Leads with Integrity:	<i>Rarely or Never</i>	<i>Occasionally</i>	<i>Often</i>	<i>Usually</i>	<i>Almost Always</i>
I model behaviors that exemplify Wells Fargo values and serve the best interests of Wells Fargo.					
I follow through on commitments to others.					
I am honest and forthright with people.					
I demonstrate respect to others at all levels in the organization.					
I avoid any conflict of interest or the appearance of a conflict of interest.					
I accept responsibility for mistakes.					

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Customer Focus:	<i>Rarely or Never</i>	<i>Occasionally</i>	<i>Often</i>	<i>Usually</i>	<i>Almost Always</i>
I demonstrate a strong desire to help customers succeed financially.					
I look for new ways to increase customer satisfaction.					
I go out of my way to deal with a customer's issue.					
I try to view a situation from the customer's perspective.					
I exceed customer expectations in terms of the quality of services delivered.					

Takes Accountability:	<i>Rarely or Never</i>	<i>Occasionally</i>	<i>Often</i>	<i>Usually</i>	<i>Almost Always</i>
I set challenging but achievable goals.					
I achieve results that exceed agreed-upon objectives.					
I accept ultimate responsibility for the quality of the customer experience.					
I take ownership of issues and see them to resolution.					

Diversity:	<i>Rarely or Never</i>	<i>Occasionally</i>	<i>Often</i>	<i>Usually</i>	<i>Almost Always</i>
I value the diversity of talents, skills and backgrounds that others bring to team efforts.					
I see differences as an asset.					
I recognize the value of all team members' contributions.					
I model respect for differences through my words and actions.					
I seek different perspectives when developing solutions.					
I listen and give serious consideration to perspectives that are different from my own perspective.					

Personal Learning Journal

As you are working on your development plans, you may find it useful to keep notes on what you are learning. This Personal Learning Journal template is one possible format for your thoughts and ideas.

Date:

Decision/topic/accomplishment:

What happened?

What worked well?

What didn't work well?

What would you do differently next time?

What did you learn about yourself?