

Sell Success (Mid to Senior-level) Profile Assessment

The following self-assessment gives you the opportunity to rate yourself on the Sell Success Profile (Mid to Senior level). 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 (Mid to Senior) Self-Assessment

Conceptual Thinking:	<i>Rarely or Never</i>	<i>Occasionally</i>	<i>Often</i>	<i>Usually</i>	<i>Almost Always</i>
I easily make connections between processes, ideas and concepts.					
I quickly grasp the critical elements and identify underlying issues in sales situations.					
I am able to draw appropriate conclusions from financial statements and summaries.					
I generate innovative ideas and think "outside of the box".					
I identify ways to apply an idea to develop a customer solution.					
I demonstrate good judgment in evaluating 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 have a strong grasp of the financial principles applying to my line of business.					
I demonstrate in-depth knowledge of Wells Fargo's products and services inside of my line of business.					
I demonstrate broad knowledge of Wells Fargo's products and services outside of my line of business.					
I demonstrate broad knowledge of the products and services offered by the competition.					

Leverages Resources:	<i>Rarely or Never</i>	<i>Occasionally</i>	<i>Often</i>	<i>Usually</i>	<i>Almost Always</i>
I find innovative ways to achieve results with limited resources.					
I promote the use of appropriate technology (e.g., email, video conferencing) to effectively communicate with people across the organization.					
I use support staff effectively, to help complete tasks.					
I support the use of technology to serve (not distance) the customer.					
I use internal and external resources appropriately.					

Sell Profile (Mid to Senior) Self-Assessment

Relationship Savvy:	<i>Rarely or Never</i>	<i>Occasionally</i>	<i>Often</i>	<i>Usually</i>	<i>Almost Always</i>
I gather input from customers and team members in order to build understanding and collaboration.					
I demonstrate interest in other people and their goals, projects and concerns.					
I show sensitivity to the concerns and challenges faced by others.					
I recognize team members across the organization for their efforts, contributions, and results.					
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 adjust my style of working and communicating to accommodate the preferences of others.					
I embrace change initiatives.					
I adapt my sales efforts to changing organizational goals and strategies.					
I ask others for frank, constructive feedback, to help improve my effectiveness.					
I modify my behavior in response to feedback from others.					

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 initiate marketing activities that generate new sales leads.					
I promptly approach customers to present ideas for addressing their newly identified needs.					
I collect and analyze information to identify and prioritize sales prospects.					

Sell Profile (Mid to Senior) Self-Assessment

Information Savvy:	<i>Rarely or Never</i>	<i>Occasionally</i>	<i>Often</i>	<i>Usually</i>	<i>Almost Always</i>
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 skillfully ask questions that lead the customer to disclose information that is helpful in the sales process (e.g., decision makers and those who influence them; decision process).					
I recognize opportunities for sales outside of my line of business and communicate these to other appropriate Wells Fargo sales professionals.					
I systematically review customer information to identify ways to improve products and services and to expand the business.					
I effectively utilize available technology to collect and analyze information to identify sales opportunities.					

Influence and Impact:	<i>Rarely or Never</i>	<i>Occasionally</i>	<i>Often</i>	<i>Usually</i>	<i>Almost Always</i>
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 structure situations (e.g., the setting, persons present, sequence of events) to create a desired impact and to maximize the chances of a favorable outcome for the organization.					
I identify and target influence efforts at the real decision makers and those who can influence them.					
I carefully plan and tailor my words in ways that achieve a desired impact.					
I formulate effective strategies by carefully considering the concerns, motivations, interrelationships, and preferred styles of all key players.					

Sell Profile (Mid to Senior) Self-Assessment

Leads with Integrity:	<i>Rarely or Never</i>	<i>Occasionally</i>	<i>Often</i>	<i>Usually</i>	<i>Almost Always</i>
I consistently 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 step forward to address ethical issues.					
I avoid any conflict of interest or the appearance of a conflict of interest.					
I accept responsibility for mistakes.					

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 prepare sales solutions that clearly address the customer's needs and preferences.					
I work well across the organization to present Wells Fargo as one company and team to our customers and markets.					
I solicit and use customer feedback to continuously improve customer satisfaction.					
I partner with others in new ways, to deliver customer solutions and retain valued customers.					

Takes Accountability:	<i>Rarely or Never</i>	<i>Occasionally</i>	<i>Often</i>	<i>Usually</i>	<i>Almost Always</i>
I produce high quality work.					
I set challenging but achievable goals.					
I demonstrate a strong sense of urgency about resolving problems, completing work, and achieving goals.					
I maintain focus and achieve results despite distractions and adverse conditions without putting the organization or team members at risk.					
I overcome objections and obstacles.					

Sell Profile (Mid to Senior) Self-Assessment

Diversity:	<i>Rarely or Never</i>	<i>Occasionally</i>	<i>Often</i>	<i>Usually</i>	<i>Almost Always</i>
I model respect for differences through my words and actions.					
I actively try to understand the diversity of our customers, team members and communities.					
I seek different perspectives when creating solutions.					
I listen and give serious consideration to perspectives that are different from my perspective.					
I articulate the power of leveraging diversity for competitive advantage.					
I develop sales strategies that reflect analysis and understanding of the diversity of the markets and customer base for services in my line of business.					
I facilitate group processes in ways that elicit the best that each team member has to offer, especially when the team members have diverse styles and perspectives.					

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?