

Sales Academy Career Pathway

Competency Skills and Behaviours
Framework for Sales

Nurture **Develop** **Grow**



Welcome

In today's fast-paced world, the landscape of sales is constantly evolving. For sales professionals entering this dynamic field, the challenges and opportunities are both exciting and diverse.

Nurture



Whether you're new to the workforce or seeking to sharpen your skills, navigating a successful sales career requires a blend of traditional expertise and innovative approaches.

This Sales Competency Framework is crafted specifically with your aspirations in mind. It's not just about learning the ropes; it's about equipping yourself with the tools to excel, adapt, and make a meaningful impact. We understand that you value growth, purpose, and the ability to make a difference in whatever you do. That's why this framework is more than just a guide—it's a roadmap to help you build a thriving career that aligns with your values and ambitions.

Throughout this framework, you'll find practical, actionable steps to develop key competencies in areas like communication, relationship building, and strategic thinking. Whether you're aiming to close your first deal or lead a sales team, these skills will be your foundation for success.

Your potential in sales is limitless, and this framework is here to help you unlock it. Let us embark on this journey together and turn your career aspirations into reality.

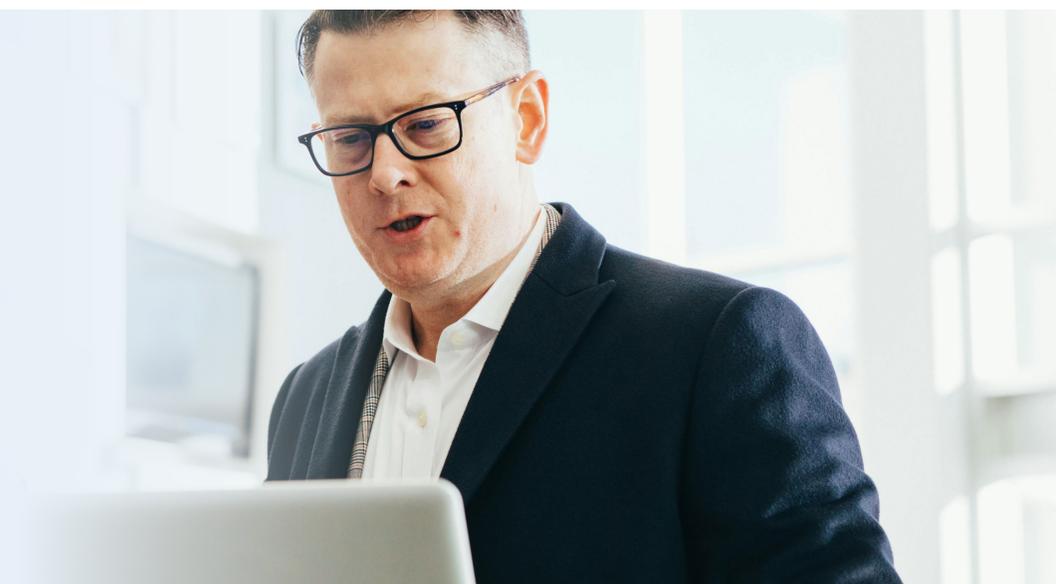
Understanding the matrix

At Fresenius, we aim to nurture our people, helping them develop their skills and grow within the organisation.



You can refer back to "understanding the matrix" at any point by clicking this icon, at the top of this document.

Develop



At Fresenius, we are dedicated to fostering the growth and success of our people, empowering them to enhance their skills and advance within the organisation. We believe that continuous learning and development are key to enabling our sales professionals to master every aspect of the sales process. This matrix is designed to help you evaluate your current proficiency and provide clear guidance on how to progress to the next level.

The definitions are defined as follows:

1. **Aware but Not Demonstrated:** You possess foundational knowledge but have not yet applied it in real-world situations.
2. **Needs Practice:** You have begun using this skill, but further practice and experience are necessary for improvement.
3. **Competent:** You can reliably and effectively execute the skill in most scenarios with confidence.
4. **Proficient:** You consistently perform at a high level, requiring minimal supervision or guidance.
5. **Expert:** You excel in this area, delivering outstanding results and frequently providing mentorship to others.

This framework will serve as your roadmap for growth, helping you identify your strengths and opportunities for development, as well as equipping you with the tools needed to achieve excellence.

Contents

Navigating this
interactive document:

-  Return to the contents page.
-  Understanding the matrix.



Grow

Sales Matrix



ROLE		LEVEL 1	LEVEL 2	LEVEL 2 CALEA	LEVEL 3	COMMERCIAL MANAGER LEVEL 1	COMMERCIAL MANAGER LEVEL 2	LEVEL 4	LEVEL 5	LEVEL 6
BEFORE THE SALE BEGINS	Research Building Trust Clear Objectives Getting Appointments	Needs Practice	Competent	Competent	Expert	Competent	Proficient	Expert	Expert	Expert
IDENTIFYING NEEDS	Listening Questioning Encouraging Creating Opportunities	Needs Practice	Competent	Competent	Proficient	Competent	Proficient	Expert	Expert	Expert
PROPOSING A SOLUTION	Focused And Relevant Enthusiastic Presentation Shows An Understanding of Needs	Needs Practice	Competent	Competent	Expert	Competent	Expert	Expert	Expert	Expert
DEALING WITH BUYING RESISTANCE	Direct Handling of Objections Persuasion Clarifying Details Meeting Concerns	Needs Practice	Competent	Competent	Proficient	Competent	Expert	Expert	Expert	Expert
CLOSING AND GAINING COMMITMENT	Closing Flexibility Minimising Risks Meeting Client's Needs	Needs Practice	Competent	Competent	Expert	Competent	Expert	Expert	Expert	Expert
FOLLOW UP	Maintains Contact Account Planning Relationship Maintenance Developing The Account	Needs Practice	Competent	Competent	Proficient	Competent	Proficient	Proficient	Expert	Expert

Sales Matrix



ROLE		LEVEL 1	LEVEL 2	LEVEL 2 CALEA	LEVEL 3	COMMERCIAL MANAGER LEVEL 1	COMMERCIAL MANAGER LEVEL 2	LEVEL 4	LEVEL 5	LEVEL 6
WE SERVE PATIENTS BEYOND EXPECTATIONS	Can do Attitude Customer Focused Passionate Adaptable	Needs Practice	Competent	Competent	Expert	Competent	Expert	Expert	Expert	Expert
WE CARE FOR EXCELLENCE	Factual and Accurate Reliable Meticulous Enthusiastic Positive Focused	Needs Practice	Competent	Competent	Proficient	Competent	Expert	Expert	Expert	Expert
WE BRING HEALTHCARE INNOVATION TO PEOPLE	Proactively offers ideas Wants to grow and learn Creative	Needs Practice	Competent	Competent	Proficient	Competent	Expert	Expert	Expert	Expert
WE LIVE THE POWER OF ONE TEAM	Personable Coachable	Needs Practice	Competent	Competent	Proficient	Competent	Proficient	Proficient	Expert	Expert
WE LIVE THE POWER OF ONE TEAM	Outcome focused Want to win Resilient Self motivated and self sufficient	Needs Practice	Competent	Competent	Proficient	Competent	Expert	Expert	Expert	Expert

Sales Matrix



ROLE		LEVEL 1	LEVEL 2	LEVEL 2 CALEA	LEVEL 3	COMMERCIAL MANAGER LEVEL 1	COMMERCIAL MANAGER LEVEL 2	LEVEL 4	LEVEL 5	LEVEL 6
PRESENTATIONS SKILLS		Needs Practice	Competent	Competent	Proficient	Competent	Proficient	Expert	Expert	Expert
PRODUCT/ THERAPY AREA KNOWLEDGE		Competent	Proficient	Proficient	Expert	Proficient	Proficient	Expert	Proficient	Competent
TENDERING EXCELLENCE		Needs Practice	Needs Practice	Needs Practice	Competent	Competent	Expert	Proficient	Expert	Expert
PLANNING AND ORGANISING	CRM Time Management	Competent	Proficient	Proficient	Expert	Proficient	Expert	Expert	Expert	Expert
NEGOTIATION SKILLS		Needs Practice	Needs Practice	Needs Practice	Competent	Competent	Expert	Proficient	Expert	Expert
EMOTIONAL INTELLIGENCE INTERPERSONAL SKILLS	Connecting with Customers Internal and External	Competent	Competent	Competent	Proficient	Competent	Proficient	Expert	Expert	Expert
BUSINESS ACUMEN	Strategic Account planning Pipeline Management and delivery	Needs Practice	Proficient	Proficient	Expert	Competent	Expert	Expert	Expert	Expert
FINANCIAL ACUMEN		Needs Practice	Needs Practice	Needs Practice	Competent	Proficient	Expert	Expert	Expert	Expert

Sales Matrix



ROLE		LEVEL 1	LEVEL 2	LEVEL 2 CALEA	LEVEL 3	COMMERCIAL MANAGER LEVEL 1	COMMERCIAL MANAGER LEVEL 2	LEVEL 4	LEVEL 5	LEVEL 6
MANAGING PERFORMANCE	Personal Development Plans Giving developmental feedback Addressing under performance Coaching				Needs Practice		Competent	Expert	Expert	Expert
LEADING THE TEAM	Empowering Others Delegation Building Effective Teams Valuing Diversity				Needs Practice		Competent	Proficient	Expert	Expert
TALENT MANAGEMENT	Onboarding & developing Team members Interview Skills Identifying Talent Developing teams careers				Needs Practice		Competent	Proficient	Expert	Expert
STRATEGIC THINKING	Change Agent Entrepreneurial thinking Project Management				Needs Practice		Competent	Competent	Proficient	Expert
COMMUNICATION	Influencing Difficult conversations Senior Stakeholder Management				Needs Practice		Competent	Proficient	Expert	Expert



Sales Framework

Sales competencies are the essential skills, behaviours, and knowledge that employees need to succeed in sales roles.



Aware

Needs practice

Competent

Proficient

Expert

Aware but not demonstrated

- No call plan in place.
- No objectives set.
- Has no knowledge or limited knowledge of stakeholders who influence decisions
- No demonstrated use of research using Veeva or Tableau

Before the sale begins

Key Elements

- Research
- Building Trust
- Clear objectives
- Getting appointments

Description

- a) Identify customers with whom to build effective sales relationships and prioritise an approach to them
- b) Ensure that proposals, or other promotional documentation or materials accompanying the demonstration and/or presentation, are prepared prior to meeting the customers
- c) Set realistic objectives for the demonstration and/or presentation
- d) Structure the face to face sales discussion to include an overview of the value of products and/or services and give the customer the opportunity to fully discuss and assess them
- e) Prepare the demonstration and/or presentation, ensuring it contains relevant unique selling propositions and points of differentiation and is structured to achieve maximum impact

Aware

Needs practice

Competent

Proficient

Expert

Needs Practice

- Call plan in place but it contains limited information and the information doesn't refer to previous call notes on Veeva or in the account plan.
- Objectives are set but are not SMART.
- There is limited knowledge of the stakeholders who influence decisions made in Business Area.

Before the sale begins

Key Elements

- Research
- Building Trust
- Clear objectives
- Getting appointments

Description

- a) Identify customers with whom to build effective sales relationships and prioritise an approach to them
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- e) Prepare the demonstration and/or presentation, ensuring it contains relevant unique selling propositions and points of differentiation and is structured to achieve maximum impact

Aware

Needs practice

Competent

Proficient

Expert

Competent

- A call plan is in place and does reference previous discussions.
- Objectives are set but there are no options for a contingency if the discussion deviates from the plan.
- Has some knowledge and understanding of the stakeholders who influence decisions.

Before the sale begins

Key Elements

- Research
- Building Trust
- Clear objectives
- Getting appointments

Description

- a) Identify customers with whom to build effective sales relationships and prioritise an approach to them
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- e) Prepare the demonstration and/or presentation, ensuring it contains relevant unique selling propositions and points of differentiation and is structured to achieve maximum impact

Aware

Needs practice

Competent

Proficient

Expert

Proficient

- A clear call plan is in place with SMART objectives are set with an aspirational and base objective which link to their previous buying position.
- Has detailed knowledge and understanding stakeholders who influence decisions made in Business Area.

Before the sale begins

Key Elements

- Research
- Building Trust
- Clear objectives
- Getting appointments

Description

- a) Identify customers with whom to build effective sales relationships and prioritise an approach to them
- b) Ensure that proposals, or other promotional documentation or materials accompanying the demonstration and/or presentation, are prepared prior to meeting the customers
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- e) Prepare the demonstration and/or presentation, ensuring it contains relevant unique selling propositions and points of differentiation and is structured to achieve maximum impact

Aware

Needs practice

Competent

Proficient

Expert

Expert

- Detailed call plan in place that references previous interactions and references other sources of information. (Veeva / Tableau etc)
- Call objectives are SMART with an aspirational and fallback objective that demonstrates a clear change of behaviour from the customer.
- Has detailed knowledge and understanding of stakeholders who influence decisions.

Before the sale begins

Key Elements

- Research
- Building Trust
- Clear objectives
- Getting appointments

Description

- a) Identify customers with whom to build effective sales relationships and prioritise an approach to them
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Aware

Needs practice

Competent

Proficient

Expert

Aware but not demonstrated

- Does not ask questions to establish a two-way dialogue.
- Does not listen to customer or interrupts/talks over them.
- Does not demonstrate appropriate verbal and non verbal communication.

Identifying Needs

Key Elements

- Listening
- Questioning
- Encouraging
- Creating opportunities

Description

- a) Builds rapport using appropriate verbal and non verbal communication to attract and engage the target audience and keep the conversation focussed to find quick ways to establish the customer's needs and wants
- b) Identify customer requirements through the use of careful questioning and confirm them by summarising their buying needs and interests
- c) Use structured questions to obtain information from prospective customers about their needs
- d) Anticipate problems, constraints or objections that could be raised and prepare possible responses to them

Aware

Needs practice

Competent

Proficient

Expert

Needs Practice

- Uses some pre-planned questions which are relevant to the call in order to uncover the unmet need for the customer.
- Questions are limited and focused heavily on seeking own agenda.
- Customer cues are missed resulting in questioning not always aligned to customer responses.

Identifying Needs

Key Elements

- Listening
- Questioning
- Encouraging
- Creating opportunities

Description

- a) Builds rapport using appropriate verbal and non verbal communication to attract and engage the target audience and keep the conversation focussed to find quick ways to establish the customer's needs and wants
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Needs practice

Competent

Proficient

Expert

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- Questions are limited and focused heavily on seeking own agenda.
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Identifying Needs

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Aware

Needs practice

Competent

Proficient

Expert

Proficient

- Uses pre-planned questions in order to uncover the unmet need for the customer.
- Picks up on customer cues and able to change questioning approach to explore and further understand customer views.
- Demonstrates effective active listening through checking questions and paraphrasing.

Identifying Needs

Key Elements

- Listening
- Questioning
- Encouraging
- Creating opportunities

Description

a) Builds rapport using appropriate verbal and non verbal communication to attract and engage the target audience and keep the conversation focussed to find quick ways to establish the customer's needs and wants

b) Identify customer requirements through the use of careful questioning and confirm them by summarising their buying needs and interests

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Aware

Needs practice

Competent

Proficient

Expert

Expert

- Pre-planned questions are used expertly to leverage insight that uncover the unmet need for the customer.
- Additional customer level insight is then utilised to provide a 'story' throughout the call.
- Questioning demonstrates high levels of insight and generates customer engagement in line with pre-call objective.
- Consistently demonstrates effective active listening including the use of checking questions and paraphrasing.

Identifying Needs

Key Elements

- Listening
- Questioning
- Encouraging
- Creating opportunities

Description

- a) Builds rapport using appropriate verbal and non verbal communication to attract and engage the target audience and keep the conversation focussed to find quick ways to establish the customer's needs and wants
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- d) Anticipate problems, constraints or objections that could be raised and prepare possible responses to them

Aware

Needs practice

Competent

Proficient

Expert

Aware but not demonstrated

- The presentation and key messages delivered are not aligned with the specific customer needs identified.
- Product messages and benefits are articulated in a vague / disjointed manner.
- Does not use materials to support the discussion
- Information conveyed is inaccurate

Proposing a solution

Key Elements

- Listening
- Questioning
- Encouraging
- Creating opportunities

Description

a) Builds rapport using appropriate verbal and non verbal communication to attract and engage the target audience and keep the conversation focussed to find quick ways to establish the customer's needs and wants

b) Identify customer requirements through the use of careful questioning and confirm them by summarising their buying needs and interests

c) Use structured questions to obtain information from prospective customers about their needs

d) Anticipate problems, constraints or objections that could be raised and prepare possible responses to them

Aware

Needs practice

Competent

Proficient

Expert

Needs Practice

- Key messages are delivered in a generic way with little attempt made to align to customer needs.
- Product benefits are delivered coherently, but with little impact.
- Information shared using materials has little or no impact and is not aligned to the customer needs.

Proposing a solution

Key Elements

- Listening
- Questioning
- Encouraging
- Creating opportunities

Description

- a) Builds rapport using appropriate verbal and non verbal communication to attract and engage the target audience and keep the conversation focussed to find quick ways to establish the customer's needs and wants
- b) Identify customer requirements through the use of careful questioning and confirm them by summarising their buying needs and interests
- c) Use structured questions to obtain information from prospective customers about their needs
- d) Anticipate problems, constraints or objections that could be raised and prepare possible responses to them

Aware

Needs practice

Competent

Proficient

Expert

Competent

- Key messages are aligned to the customer need.
- Product features and benefits are clearly articulated.
- Discussion demonstrates a good level of knowledge. Information in the material is used to address the specific area in which customer has a need or interest
- Information given is accurate and delivered in an engaging way.

Proposing a solution

Key Elements

- Listening
- Questioning
- Encouraging
- Creating opportunities

Description

- a) Builds rapport using appropriate verbal and non verbal communication to attract and engage the target audience and keep the conversation focussed to find quick ways to establish the customer's needs and wants
- b) Identify customer requirements through the use of careful questioning and confirm them by summarising their buying needs and interests
- c) Use structured questions to obtain information from prospective customers about their needs
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Aware

Needs practice

Competent

Proficient

Expert

Proficient

- Key message and presentation of material demonstrates clear tailoring of benefits to meet the customer needs with good impact.
- Discussion demonstrates a high level of knowledge.
- The conversation is two way and interactive.
- Demonstrates high level of disease and therapy area knowledge by using tailored evidence from within the product material to reinforce the product messaging.

Proposing a solution

Key Elements

- Listening
- Questioning
- Encouraging
- Creating opportunities

Description

- a) Builds rapport using appropriate verbal and non verbal communication to attract and engage the target audience and keep the conversation focussed to find quick ways to establish the customer's needs and wants
- b) Identify customer requirements through the use of careful questioning and confirm them by summarising their buying needs and interests
- c) Use structured questions to obtain information from prospective customers about their needs
- d) Anticipate problems, constraints or objections that could be raised and prepare possible responses to them

Aware

Needs practice

Competent

Proficient

Expert

Expert

- Key messages skilfully tailored in the discussion to address the customer needs with appropriate material used to deliver the message with impact.
- A broader discussion is generated demonstrating a high level of product and therapy area knowledge.
- Demonstrates high level of disease and therapy area knowledge by using highly tailored evidence within, and where appropriate, beyond the product materials to overcome potential barrier and reinforce message, leading to further opportunities.

Proposing a solution

Key Elements

- Listening
- Questioning
- Encouraging
- Creating opportunities

Description

- a) Builds rapport using appropriate verbal and non verbal communication to attract and engage the target audience and keep the conversation focussed to find quick ways to establish the customer's needs and wants
- b) Identify customer requirements through the use of careful questioning and confirm them by summarising their buying needs and interests
- c) Use structured questions to obtain information from prospective customers about their needs
- d) Anticipate problems, constraints or objections that could be raised and prepare possible responses to them

Aware

Needs practice

Competent

Proficient

Expert

Aware but not demonstrated

- Ignores or doesn't acknowledge the objection
- Avoids answering objections due to limited disease area or clinical understanding
- Communicates inaccurate or misleading information to overcome the objection

Dealing with buying resistance

Key Elements

- Direct handling of objections
- Persuasion
- Clarifying details
- Meeting concerns

Description

- a) How to overcome customers' objections sensitively and constructively and how to respond effectively to their queries
- b) How to deal with customer problems and queries
- c) How to read buyer signals including verbal and non-verbal cues

Aware

Needs practice

Competent

Proficient

Expert

Needs Practice

- Does not acknowledge the customer's objection
- Does not clarify the exact nature of the customer objection and whether this is a true or false objection
- Does not utilise appropriate information and insight to handle the objection effectively

Dealing with buying resistance

Key Elements

- Direct handling of objections
- Persuasion
- Clarifying details
- Meeting concerns

Description

- a) How to overcome customers' objections sensitively and constructively and how to respond effectively to their queries
- b) How to deal with customer problems and queries
- c) How to read buyer signals including verbal and non-verbal cues

Aware

Needs practice

Competent

Proficient

Expert

Competent

- Acknowledges the objection but fails to clarify the precise nature of the objection
- Uses limited or top line information to handle the objection
- Moves on without establishing that the customer is satisfied with the response to the objection

Dealing with buying resistance

Key Elements

- Direct handling of objections
- Persuasion
- Clarifying details
- Meeting concerns

Description

- a) How to overcome customers' objections sensitively and constructively and how to respond effectively to their queries
- b) How to deal with customer problems and queries
- c) How to read buyer signals including verbal and non-verbal cues

Aware

Needs practice

Competent

Proficient

Expert

Proficient

- Acknowledges the objection in a professional manner
- Clarifies the nature of the objection using probing questions before providing a response
- Utilises relevant information and insight to handle the objection effectively
- Ensures that the information provided has resolved the objection before moving on

Dealing with buying resistance

Key Elements

- Direct handling of objections
- Persuasion
- Clarifying details
- Meeting concerns

Description

- a) How to overcome customers' objections sensitively and constructively and how to respond effectively to their queries
- b) How to deal with customer problems and queries
- c) How to read buyer signals including verbal and non-verbal cues

Aware

Needs practice

Competent

Proficient

Expert

Expert

- Consistently acknowledges the customer objection without being defensive and converts the objection into an opportunity
- Uses impactful clarifying questions to understand the exact nature of the customer objection and quickly establishes the true objection
- Utilises key information and deep insight to handle the objection effectively

Dealing with buying resistance

Key Elements

- Direct handling of objections
- Persuasion
- Clarifying details
- Meeting concerns

Description

- a) How to overcome customers' objections sensitively and constructively and how to respond effectively to their queries
- b) How to deal with customer problems and queries
- c) How to read buyer signals including verbal and non-verbal cues

Aware

Needs practice

Competent

Proficient

Expert

Aware but not demonstrated

- No summary of key messages given at any point during the call
- Makes no attempt to check or clarify agreements at any point in the call
- Does not attempt to gain commitment
- No follow up agreed

Closing and Gaining Commitment

Key Elements

- Closing
- Flexibility
- Minimising risks
- Meeting client's needs

Description

- a) Close the sale by gaining the commitment of the customer and complete the formalities of the sale following organisational procedures
- b) Interpret buying signals which are given by the customer and act on them to close each stage of the sale
- c) Check that the prospective customer agrees with the solution to overcoming the objection

Aware

Needs practice

Competent

Proficient

Expert

Needs Practice

- Does not align summary with key agreements during discussion
- Closes conversation with some of points agreed
- Actions are not mutually agreed
- Follow-up actions are not SMART Attempt at follow up is made

Closing and Gaining Commitment

Key Elements

- Closing
- Flexibility
- Minimising risks
- Meeting client's needs

Description

- a) Close the sale by gaining the commitment of the customer and complete the formalities of the sale following organisational procedures
- b) Interpret buying signals which are given by the customer and act on them to close each stage of the sale
- c) Check that the prospective customer agrees with the solution to overcoming the objection

Aware

Needs practice

Competent

Proficient

Expert

Competent

- Summarises top line points from the discussion with some key opportunities identified
- Does not capture all agreements made in summary
- Confirms actions and commitment mainly with closed-ended questions; attempts to obtain agreement from customer
- Actions agreed are not time bound or specific

Closing and Gaining Commitment

Key Elements

- Closing
- Flexibility
- Minimising risks
- Meeting client's needs

Description

- a) Close the sale by gaining the commitment of the customer and complete the formalities of the sale following organisational procedures
- b) Interpret buying signals which are given by the customer and act on them to close each stage of the sale
- c) Check that the prospective customer agrees with the solution to overcoming the objection

Aware

Needs practice

Competent

Proficient

Expert

Proficient

- Summarises key messages and appropriately recaps agreements made
- Gains agreements and jointly agrees follow up actions consistent with customer and patient needs
- Closes conversation from initial agenda and call objectives
- Specific, mutual follow up actions are agreed with timelines in place and clarified with customer
- Follow up is agreed with timelines in place

Closing and Gaining Commitment

Key Elements

- Closing
- Flexibility
- Minimising risks
- Meeting client's needs

Description

- a) Close the sale by gaining the commitment of the customer and complete the formalities of the sale following organisational procedures
- b) Interpret buying signals which are given by the customer and act on them to close each stage of the sale
- c) Check that the prospective customer agrees with the solution to overcoming the objection

Aware

Needs practice

Competent

Proficient

Expert

Expert

- Clear summary including all points of agreement reached during discussion and customer is asked to summarise their reflections and actions
- Closes conversation linked to initial agenda and objectives
- Customer is convinced that Fresenius Kabi Product is an effective solution to their need
- Confirms follow-up actions, with specifics for commitment discussed in clear SMART road map for next steps
- Follow up is agreed with timelines in place

Closing and Gaining Commitment

Key Elements

- Closing
- Flexibility
- Minimising risks
- Meeting client's needs

Description

- a) Close the sale by gaining the commitment of the customer and complete the formalities of the sale following organisational procedures
- b) Interpret buying signals which are given by the customer and act on them to close each stage of the sale
- c) Check that the prospective customer agrees with the solution to overcoming the objection

Aware

Needs practice

Competent

Proficient

Expert

Aware but not demonstrated

- Does not share relevant information across the team
- Does not create opportunities with future calls or meetings
- Relevant records and account plans not updated following a call

Follow Up

Key Elements

- Maintains contact
- Account planning
- Relationship maintenance
- Developing the account

Description

- a) Deal with customer queries and objections with clear and accurate responses
- b) Take opportunities to develop a positive relationship with customers and identify and pursue further customer contact
- c) Follow up on agreed actions with the customer
- d) Record all necessary information accurately and completely on Veeva

Aware

Needs practice

Competent

Proficient

Expert

Needs Practice

- Occasionally shares information across the team or shares information within a limited internal network
- Basic consideration given to sequential calling with a focus on short term objectives
- Relevant records and account plans not consistently updated following a call

Follow Up

Key Elements

- Maintains contact
- Account planning
- Relationship maintenance
- Developing the account

Description

- a) Deal with customer queries and objections with clear and accurate responses
- b) Take opportunities to develop a positive relationship with customers and identify and pursue further customer contact
- c) Follow up on agreed actions with the customer
- d) Record all necessary information accurately and completely on Veeva

Aware

Needs practice

Competent

Proficient

Expert

Competent

- Top line information captured and communicated across immediate team members
- Relevant records and account plans updated following a call
- Has a medium term call plan focused mainly on individual calls and follow up

Follow Up

Key Elements

- Maintains contact
- Account planning
- Relationship maintenance
- Developing the account

Description

- a) Deal with customer queries and objections with clear and accurate responses
- b) Take opportunities to develop a positive relationship with customers and identify and pursue further customer contact
- c) Follow up on agreed actions with the customer
- d) Record all necessary information accurately and completely on Veeva

Aware

Needs practice

Competent

Proficient

Expert

Proficient

- Consistently shares information across the broader team involving all relevant team members
- Follow up is agreed
- Relevant records and account plans consistently updated with key insights aligned to the customer and account
- Sequential call plan is long term and involves input from across the broader account team where relevant

Follow Up

Key Elements

- Maintains contact
- Account planning
- Relationship maintenance
- Developing the account

Description

- a) Deal with customer queries and objections with clear and accurate responses
- b) Take opportunities to develop a positive relationship with customers and identify and pursue further customer contact
- c) Follow up on agreed actions with the customer
- d) Record all necessary information accurately and completely on Veeva

Aware

Needs practice

Competent

Proficient

Expert

Expert

- Captures all relevant, quality insight and ensures this is clearly communicated internally
- Integrates call information into account plan strategy and actively plans next steps with customer
- Captures all relevant information and insight and ensures this is clearly communicated internally
- Considers network of influencers in the follow up plan

Follow Up

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Behaviours Framework

A behaviours framework outlines the key competencies, skills, and attitudes expected of you in your role, offering clear guidance on the behaviours needed to succeed and align with our organisational goals



Aware

Needs practice

Competent

Proficient

Expert

Aware but not demonstrated

- The employee does not demonstrate this behaviour.

We serve patients beyond expectations

Key Elements

- Can do Attitude
- Customer Focused
- Passionate
- Adaptable

Description

- At Fresenius, we are dedicated and committed to improving patient outcomes and experience.
- We take courageous decisions - with the aim of exceeding expectations.
- Getting things done - that's how we work at Fresenius.

Aware

Needs practice

Competent

Proficient

Expert

Needs Practice

- The employee is able to demonstrate this behaviour however, this is not demonstrated on a regular basis.

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- The employee goes above and beyond and is regarded as a role model for this behaviour.

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Proficient

Expert

Aware but not demonstrated

- The employee does not demonstrate this behaviour.

We care for excellence

Key Elements

- Factual and Accurate
- Reliable
- Meticulous
- Enthusiastic
- Positive
- Focused

Description

- We act with integrity in the best interest of the company.
- We have a clear moral compass: our true north.
- We stress the pivotal importance of quality and the need to improve continuously.

Aware

Needs practice

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- The employee does not demonstrate this behaviour.

We bring Healthcare innovation to people

Key Elements

- Proactively offers ideas
- Wants to grow and learn
- Creative

Description

- We foster a spirit of continuous learning - both from our own reflections and from feedback.
- We strive to create something truly new and transformative.

Aware

Needs practice

Competent

Proficient

Expert

Needs Practice

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We live the power of one team

Key Elements

- Personable
- Coachable

Description

- We make success a collaborative #TeamFresenius effort.
- We are committed to developing and empowering diverse talent.
- We foster a performance-oriented mindset with individual responsibility.
- We ensure every member of #TeamFresenius has the support, opportunities, and respect they need to thrive.

Aware

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Competent

Proficient

Expert

Aware but not demonstrated

- The employee does not demonstrate this behaviour.

We act together for a better tomorrow

Key Elements

- Outcome focused
- Want to win
- Resilient
- Self motivated and self sufficient

Description

- Acting with foresight, committed to our heritage and changing society for the better.
- Fully supporting the priorities of our ESG agenda.
- We fulfill our contributions as a force for good across generations.

Aware

Needs practice

Competent

Proficient

Expert

Needs Practice

- The employee is able to demonstrate this behaviour however, this is not demonstrated on a regular basis.

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Skills Framework

This skills framework outlines the essential skills and expertise required for your role, providing clear guidance on the abilities you need to develop and demonstrate to succeed and advance within the organisation.



Aware

Needs practice

Competent

Proficient

Expert

Aware but not demonstrated

- No evidence of pre plan or delivery of presentations.
- Poor quality of delivery of presentation.
- Limited or no knowledge of presentation content.
- Limited or little engagement from customers.
- Lacks confidence

Presentations skills

Key Elements

Presentation skills encompass the ability to effectively communicate in formal settings like business meetings or informal ones like group discussions. These skills go beyond just delivering content; they involve structuring your message, using nonverbal communication, and interacting with the audience.

Key benefits of strong presentation skills include:

- 1) Effective Communication:** They help deliver ideas in a memorable and understandable way, crucial for pitching, reporting, or persuading.
- 2) Increased Influence:** A skilled presenter can inspire action, gain support, and influence opinions, which is vital for leadership or sales.
- 3) Boosts Confidence:** Mastery in presenting enhances confidence in public speaking and general communication.
- 4) Career Enhancement:** Strong presentation abilities are highly valued by employers and can lead to promotions, leadership roles, or customer-facing positions.
- 5) Audience Engagement:** Good presentation skills keep the audience engaged, making the message more impactful.
- 6) Handling Challenges:** Presenters can manage difficult questions or objections with ease, ensuring productive discussions.
- 7) Relationship Building:** Effective communication fosters trust and credibility, strengthening professional and personal relationships.
- 8) Critical Thinking:** Presenters prepare for feedback, enhancing problem-solving and critical thinking.

In essence, excellent presentation skills boost confidence, influence, engagement, and career growth while fostering better relationships and problem-solving abilities.

Aware

Needs practice

Competent

Proficient

Expert

Needs Practice

- Some evidence of planning.
- Familiar with content.
- Needs more guidance on delivery. Limited expertise on dealing with questions.

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Competent

Proficient

Expert

Competent

- Plan in place pre presentation with a clear overview of objectives and outcomes.
- In depth knowledge of presentation content.
- Clear and articulate delivery. Appropriate level delivery to the audience.
- Can confidently answer questions relating to the presentation.
- Evidence of customer engagement

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Needs practice

Competent

Proficient

Expert

Proficient

- Can handle questions.
- Can control and influence the audience.
- Keeps the presentation on track.
- Delivery is accurately tailored to the audience.
- Strong customer engagement

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Aware

Needs practice

Competent

Proficient

Expert

Expert

- Written plan of objectives and outcomes for the presentation.
- Can pre-empt and adapt the presentation to the audience needs
- Interactive delivery of the presentation.
- Utilises additional resources to support the presentation e.g., Guidelines, clinical papers, supporting material.
- Role model who can support and train other team members.
- Confident to present to senior customers/ SLT Level

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Aware

Needs practice

Competent

Proficient

Expert

Aware but not demonstrated

- Product knowledge is limited or not clearly demonstrated in sales calls.
- Not demonstrating competent level across all aspects of the sales call.
- Not sharing or limited evidence of sharing information across the team.

Product/ therapy Area Knowledge

Description

A salesperson with strong product and therapy area knowledge is better equipped to effectively communicate the benefits and features of their offering to customers. This deep understanding allows them to confidently explain how their product/service works, its advantages, and how it addresses specific customer needs, making their pitch more persuasive. Customers are more likely to trust and engage with a salesperson who demonstrates expertise in the product/service and its application within the relevant therapy area.

In addition, strong knowledge of the therapy area helps salespeople tailor their messaging to the unique challenges and goals of healthcare professionals or institutions. By understanding the medical and clinical context in which their product operates, they can position it as a solution that improves patient outcomes or streamlines medical processes. This relevance not only makes the sales pitch more effective but also strengthens the salesperson's credibility as a trusted partner in the healthcare field.

Finally, having a deep understanding of both the product/service and therapy area allows salespeople to anticipate and address objections or concerns from customers. They can provide accurate and insightful responses to technical questions, compare their product/service to competitors, and offer evidence-based benefits. This level of expertise ultimately leads to stronger customer relationships, better sales outcomes, and long-term success in the market.

Aware

Needs practice

Competent

Proficient

Expert

Needs Practice

- Some evidence of product / therapy area knowledge.
- Taking active steps to build on knowledge.
- Recognises the gaps in their level and knows how to ask for help to address gaps.

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Aware

Needs practice

Competent

Proficient

Expert

Competent

- Evidence of strong product/ therapy area knowledge observed in sales calls. Level of competent in sales competency framework.
- Regularly sharing and contributing market and product information in team, sales and marketing meetings.
- Can confidently deal with customer enquiries

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Aware

Needs practice

Competent

Proficient

Expert

Proficient

- Greater knowledge of therapy area and competitors.
- Aware of wider impact on the business.
- Key contributor to other teams in the business.
- Could support with other members of the team.
- Can effectively apply product knowledge with customers

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Aware

Needs practice

Competent

Proficient

Expert

Expert

- Supports training and ITC. Proficient / Expert across all levels in the competency framework.
- Viewed by customers as product/ therapy expert.
- Strong contribution across internal departments.

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Aware

Needs practice

Competent

Proficient

Expert

Aware but not demonstrated

- No exposure/ involvement with the tender process.
- Little or no understanding of the FK tender process.

Tendering Excellence

Description

Tendering excellence skills for salespeople are essential for crafting and winning bids in competitive environments, such as responding to tenders. Salespeople must conduct thorough research to understand the customer's specific needs and offer tailored solutions that address their pain points. This ensures that the proposal stands out as relevant and compelling.

Salespeople also need a comprehensive understanding of the tender process, including analysing requirements, ensuring compliance with submission guidelines, and managing timelines. They must be skilled at writing clear and persuasive proposals that highlight their company's value proposition, using language that resonates with decision-makers while differentiating from competitors.

Analytical and problem-solving skills are critical for developing competitive pricing strategies, assessing risks, and formulating a win strategy. Collaboration across departments, such as legal, finance, and operations, is necessary to gather the right information and craft a cohesive bid. Additionally, project management and organisational skills help salespeople keep track of multiple bids, deadlines, and documentation.

Strong attention to detail, negotiation skills, and the ability to present the proposal effectively are also key. Salespeople must ensure accuracy in their bids, negotiate terms that balance customer needs with their company's interests, and handle post-bid presentations confidently. Resilience and adaptability are important as not all bids are successful, and being able to learn from rejection and adapt to changing requirements is vital for continuous improvement in tendering.

Aware

Needs practice

Competent

Proficient

Expert

Needs Practice

- Some exposure / involvement with the tender process.
- Training/ shadowing is needed to understand the process.
- Has an awareness of tender situation on their territory.

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Proficient

Expert

Competent

- Clear knowledge of tender process and stakeholders within their territory.
- Able to provide knowledge and insights into the tender process.
- This should include information about competitors and environment.

Tendering Excellence

Description

Tendering excellence skills for salespeople are essential for crafting and winning bids in competitive environments, such as responding to tenders. Salespeople must conduct thorough research to understand the customer's specific needs and offer tailored solutions that address their pain points. This ensures that the proposal stands out as relevant and compelling.

Salespeople also need a comprehensive understanding of the tender process, including analysing requirements, ensuring compliance with submission guidelines, and managing timelines. They must be skilled at writing clear and persuasive proposals that highlight their company's value proposition, using language that resonates with decision-makers while differentiating from competitors.

Analytical and problem-solving skills are critical for developing competitive pricing strategies, assessing risks, and formulating a win strategy. Collaboration across departments, such as legal, finance, and operations, is necessary to gather the right information and craft a cohesive bid. Additionally, project management and organisational skills help salespeople keep track of multiple bids, deadlines, and documentation.

Strong attention to detail, negotiation skills, and the ability to present the proposal effectively are also key. Salespeople must ensure accuracy in their bids, negotiate terms that balance customer needs with their company's interests, and handle post-bid presentations confidently. Resilience and adaptability are important as not all bids are successful, and being able to learn from rejection and adapt to changing requirements is vital for continuous improvement in tendering.

Aware

Needs practice

Competent

Proficient

Expert

Proficient

- Can complete tender responses and proof read.
- Can actively critique the tender document.

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Aware

Needs practice

Competent

Proficient

Expert

Expert

- Actively involved in tender process and input into tender documents.
- Could comment on viability of tender.
- Actively involved in tender presentations.
- If applicable, actively involved in review meetings/ KPI reporting

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Aware

Needs practice

Competent

Proficient

Expert

Aware but not demonstrated

- No evidence of call planning / territory.
- Poor / little use of Veeva / strategic account plan inputting and updating.

Planning and Organising

Description

Planning and organisation skills are crucial for salespeople as they help manage time, resources, and priorities effectively. Salespeople often juggle multiple tasks, from prospecting to Customer meetings and follow-ups. By planning well, they can focus on high-value activities and maximise sales opportunities, while also ensuring consistent progress toward their sales targets.

These skills also help in managing Customers and relationships. Well-organised salespeople stay on top of follow-ups and communication, building trust and maintaining strong relationships with both internal and external stakeholders. Being prepared for meetings and consistently delivering on promises increases Customer satisfaction and boosts the chances of closing deals.

Moreover, organisation allows salespeople to manage resources, including tools and data, more efficiently. It enables them to use sales materials effectively and work closely with other teams to deliver comprehensive solutions. Tracking sales progress and adjusting tactics based on performance insights helps improve overall strategy.

Finally, planning reduces stress and helps salespeople balance workloads. Properly managing time and priorities prevents last-minute rushes and burnout, leading to better mental clarity and improved decision-making. Ultimately, planning and organisation ensure that salespeople stay on course, meet deadlines, and achieve their sales goals.

Aware

Needs practice

Competent

Proficient

Expert

Needs Practice

- Inconsistent or intermittent evidence.
- Capture of basic detail.
- Needs to be prompted for deadlines.

Planning and Organising

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Aware

Needs practice

Competent

Proficient

Expert

Competent

- Demonstration of effective territory management, Consistently meets deadlines e.g. Ilean, SOPs, Veeva Input.
- Strategic account planning is a live document that is updated on an ongoing basis.

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Aware

Needs practice

Competent

Proficient

Expert

Proficient

- Good territory management.
- Greater level of coverage of customers - depth and breadth.
- Excellent information recording in Veeva / Strategic Account Plans.

Planning and Organising

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Aware

Needs practice

Competent

Proficient

Expert

Expert

- Role model for territory management.
- Takes on additional responsibilities e.g. Projects, coaching/ mentoring.
- Can manage multiple projects

Planning and Organising

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Aware

Needs practice

Competent

Proficient

Expert

Aware but not demonstrated

- No/ Little evidence of any negotiation skills with customers or colleagues.

Negotiation skills

Key Elements

Active Listening: Understanding the other party's needs, concerns, and perspectives through careful listening, which fosters trust and helps identify mutual benefits.

Preparation: Researching and gathering relevant information beforehand to anticipate potential objections, identify goals, and plan strategies.

Effective Communication: Clearly articulating your own position, interests, and expectations while being respectful and concise.

Emotional Intelligence: Managing emotions (both your own and the other party's) to maintain composure, empathy, and focus during difficult discussions.

Problem-Solving: Seeking creative solutions that accommodate the needs of both parties, often by thinking outside the box and exploring win-win scenarios.

Assertiveness: Standing firm on key issues while remaining respectful, ensuring that your priorities are acknowledged without being overly aggressive or passive.

Adaptability: Flexibly adjusting your approach in response to new information or changes in the other party's position during negotiations.

Patience and Perseverance: Staying calm under pressure and not rushing the process, especially when discussions are challenging or prolonged.

Bargaining and Compromise: Understanding when to make concessions and how to leverage bargaining power to achieve a fair outcome.

Building Rapport: Establishing trust and goodwill with the other party, which can make the negotiation more cooperative and productive.

Description

Negotiation skills refer to the abilities required to facilitate discussions and reach agreements between parties with differing interests. Strong negotiation skills are vital in business, personal relationships, and conflict resolution.

Aware

Needs practice

Competent

Proficient

Expert

Needs Practice

- Some awareness of the skills to negotiate.
- Will try and negotiate but can defer the decision to their manager in a timely manner.

Negotiation skills

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Aware

Needs practice

Competent

Proficient

Expert

Competent

- Confident to effectively instigate and deal with the negotiation process
- Awareness of FKs business expectations and handles discussion in line with this.
- Solution focussed approach

Negotiation skills

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Aware

Needs practice

Competent

Proficient

Expert

Proficient

- Effectively maintains customer relationship when negotiating.
- Looks for a win solution.
- Demonstrates a flexible approach.
- Competent to say “No” Owns the conversation and decision.

Negotiation skills

Key Elements

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Description

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Aware

Needs practice

Competent

Proficient

Expert

Expert

- Confident to present at senior/ executive level internally or within the NHS.
- Access to relevant material to make commercial decisions.
- Able to look at the big picture.

Negotiation skills

Key Elements

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Aware

Needs practice

Competent

Proficient

Expert

Aware but not demonstrated

- Not self aware. Lacks awareness of impact on others. Basic communicator level to a smaller audience.

Emotional Intelligence & Interpersonal skills

Description

Emotional intelligence (EI) is the ability to recognise, understand, manage, and influence both your own emotions and those of others. It significantly affects personal and professional interactions, guiding how you handle relationships, make decisions, and navigate social situations. Key components of EI include self-awareness, self-regulation, motivation, empathy, and social skills. Self-awareness helps individuals understand their emotions, while self-regulation involves managing emotions and impulses in a healthy way. Motivation drives people to achieve goals, empathy allows them to connect with others, and strong social skills facilitate effective communication and teamwork.

The importance of emotional intelligence cannot be overstated, as it plays a vital role in communication, decision-making, and relationship-building. Individuals with high EI express themselves clearly, listen actively, and make better decisions by managing emotions in stressful situations. Empathy and social skills help them connect with others, fostering deeper trust and smoother interactions, especially in conflict resolution. These abilities are crucial for improving relationships and navigating complex social dynamics.

In the workplace, EI is particularly valuable for leadership, where emotionally intelligent leaders inspire, motivate, and support their teams, creating a positive work environment. Overall, emotional intelligence enhances both personal and professional aspects of life by blending self-management and interpersonal skills to effectively handle emotional challenges and interactions.

Aware

Needs practice

Competent

Proficient

Expert

Needs Practice

- Some awareness of impact on others. Needs some practice.
- Some degree of emotional intelligence. Ability to communicate to a wider group.

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Aware

Needs practice

Competent

Proficient

Expert

Competent

- Demonstrating self awareness and adjustment of style. Developing style to suit the needs of the situation.
- Good sound judgement.
- Ability to connect with a regional audience.

Emotional Intelligence & Interpersonal skills

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Aware

Needs practice

Competent

Proficient

Expert

Proficient

- Ability to consistently deliver effective communication.
- Clarity around key messaging.
- Adaptable.
- Ability to handle difficult conversations. Solution orientated.
- Ability to communicate to a national audience.

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Aware

Needs practice

Competent

Proficient

Expert

Expert

- Self aware and expert listener.
- Holds skills of listening to understand.
- Strong active listening skills.
- High levels of resilience. Strategic thinking.
- In touch with own mental health.
- Ability to help, influence others.
- Conflict resolution and ability to mediate.
- Ability to pass on skills to others.

Emotional Intelligence & Interpersonal skills

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Aware

Needs practice

Competent

Proficient

Expert

Aware but not demonstrated

- No awareness of stock/forecast management.
- Basic awareness of profitability.
- Limited understanding of where the national business is.

Business Acumen

Description

Business acumen is crucial for salespeople because it enables them to understand their customer's overall business environment, challenges, and objectives. By grasping how their customers operate, salespeople can offer solutions that align with their customer's strategic goals, making their pitches more relevant and impactful. This deeper understanding helps build trust and credibility, as customers see the salesperson as a partner who understands their needs, not just someone trying to sell a product.

Salespeople with strong business acumen can also better communicate the financial and operational value of their offerings. They can articulate how their solutions will improve efficiency, reduce costs, or increase revenue, directly tying the product's benefits to measurable business outcomes. This ability to present tangible value makes it easier to convince decision-makers and close deals, especially in complex sales environments.

Moreover, having business acumen allows salespeople to anticipate market trends, customer pain points, and competitor actions. By staying ahead of these developments, they can adapt their strategies and offer innovative solutions that keep their customers competitive. This forward-thinking approach positions the salesperson as a valuable advisor, strengthening long-term customer relationships.

Finally, business acumen helps salespeople align their efforts with their own company's objectives, such as profitability, growth, and market positioning. Understanding how their sales impact their company's bottom line ensures they focus on high-value deals and contribute to the organisation's overall success. This alignment benefits both the salesperson and the company, fostering long-term career growth and business performance.

Aware

Needs practice

Competent

Proficient

Expert

Needs Practice

- Can deliver a basic business proposal.
- Some awareness of the overall business impact of proposals.
- Some awareness of profitable product lines and the core customer target base.
- Good awareness of national business situation.

Business Acumen

Description

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Aware

Needs practice

Competent

Proficient

Expert

Competent

- Good understanding of what generates profit.
- Seeing the right customers at the right time (Good customer management).
- Ability to onboard customers appropriately.
- Delivers business proposals at management level.
- Delivers on a timely manner.

Business Acumen

Description

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Aware

Needs practice

Competent

Proficient

Expert

Proficient

- Ability to effectively say no.
- Good collaborator with other divisions.
- Can connect stakeholders together for the overall benefit of the business.
- Focusses on higher sales impact to wider business.
- Delivers long term profitable business.
- Ability to negotiate price increases.
- Very good time management.

Business Acumen

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Aware

Needs practice

Competent

Proficient

Expert

Expert

- Win orientated.
- Understanding each factor/decision on the overall business.
- Planned margin management.
- Strategic thinking.
- Influencing high level KOL's (C suite).
- Present to board level.

Business Acumen

Description

Business acumen is crucial for salespeople because it enables them to understand their customer's overall business environment, challenges, and objectives. By grasping how their customers operate, salespeople can offer solutions that align with their customer's strategic goals, making their pitches more relevant and impactful. This deeper understanding helps build trust and credibility, as customers see the salesperson as a partner who understands their needs, not just someone trying to sell a product.

Salespeople with strong business acumen can also better communicate the financial and operational value of their offerings. They can articulate how their solutions will improve efficiency, reduce costs, or increase revenue, directly tying the product's benefits to measurable business outcomes. This ability to present tangible value makes it easier to convince decision-makers and close deals, especially in complex sales environments.

Moreover, having business acumen allows salespeople to anticipate market trends, customer pain points, and competitor actions. By staying ahead of these developments, they can adapt their strategies and offer innovative solutions that keep their customers competitive. This forward-thinking approach positions the salesperson as a valuable advisor, strengthening long-term customer relationships.

Finally, business acumen helps salespeople align their efforts with their own company's objectives, such as profitability, growth, and market positioning. Understanding how their sales impact their company's bottom line ensures they focus on high-value deals and contribute to the organisation's overall success. This alignment benefits both the salesperson and the company, fostering long-term career growth and business performance.

Aware

Needs practice

Competent

Proficient

Expert

Aware but not demonstrated

- Limited application/experience.
- Ability to read data.
- Basic level of finance.

Financial Acumen

Description

Financial acumen is essential for salespeople as it helps them understand how their products or services impact a customer's and organisation's financial health. By understanding financial statements like income, balance sheets, and cash flow, salespeople can better position their solutions to increase revenue or reduce costs for customers.

Understanding pricing models and profitability is another key aspect. Salespeople need to grasp different pricing strategies and how they affect both their company's margins and the customer's budget. This enables them to balance offering competitive pricing while maintaining their own company's financial health.

Salespeople must also manage risk and understand financial metrics. Knowing a customer's creditworthiness and understanding contract terms helps them avoid financial risks. In addition, being familiar with financial metrics like gross margin, EBITDA, financial forecasting and Key Performance Indicators (KPIs) allows salespeople to present their products/services as solutions that directly improve the customer's financial outcomes.

Finally, salespeople with financial acumen excel in negotiation and value-based selling. They can negotiate terms that benefit both parties while understanding the financial impact of various scenarios. By explaining how their products enhance a customer's competitive position, improve efficiency, and manage costs, salespeople can close more deals and deliver measurable value to both the customer's and organisation's bottom line.

Aware

Needs practice

Competent

Proficient

Expert

Needs Practice

- Demonstrates some data analysis ability.
- Broader application of data vs an entry level.
- Ability to present to manager.

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Aware

Needs practice

Competent

Proficient

Expert

Competent

- Ability to build a business case.
- Good awareness of internal financial systems.
- Accurate data analysis (Regional level).
- Ability to calculate margins.

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Aware

Needs practice

Competent

Proficient

Expert

Proficient

- Accurate data analysis (National level).
- Ability to present business case to national stakeholders.
- Ownership of regional level business impact.
- Ability to critique financial proposals.
- Ability to strategically position data.

Financial Acumen

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Aware

Needs practice

Competent

Proficient

Expert

Expert

- Strong financial forecast management.
- Understand all aspects of the P&L.
- Contribute to company target/EBIT.
- Strong horizon scanning and GAP analysis.
- Good Margin management.
- Full ownership of business unit.
- Ability to present to board level.

Financial Acumen

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Aware

Needs practice

Competent

Proficient

Expert

Aware but not demonstrated

- Aware of the concept but not applied.

Coaching and Mentoring

Description

Coaching and mentoring are valuable skills for salespeople, as they enhance both individual and team performance. A salesperson who can coach others helps foster a culture of continuous improvement within the team by sharing strategies, techniques, and insights that have led to their own success. This not only boosts the performance of less experienced team members but also creates a collaborative and supportive sales environment where everyone can thrive.

Mentoring goes beyond immediate performance improvement; it involves guiding and developing the long-term potential of colleagues. Salespeople with strong mentoring skills can help others navigate challenges, set goals, and develop the mindset needed for sustained growth. By providing advice on career development, relationship building, and problem-solving, mentors play a key role in shaping the future success of the team.

Incorporating coaching and mentoring into a salesperson's skill set also enhances leadership potential. Salespeople who effectively mentor others often gain trust and respect within the team, positioning themselves for leadership roles. They not only contribute to the success of individual team members but also drive the overall success of the sales organisation by creating a strong, well-supported, and high-performing team.

Aware

Needs practice

Competent

Proficient

Expert

Needs Practice

- Some awareness of coaching/mentoring.
- Needs further development.

Coaching and Mentoring

Description

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Aware

Needs practice

Competent

Proficient

Expert

Competent

- Awareness of when to coach and when to mentor.
- Awareness of the importance of questioning.
- Strong on both coaching and mentoring.
- Active listener.

Coaching and Mentoring

Description

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Aware

Needs practice

Competent

Proficient

Expert

Proficient

- Developmental coaching ability.
- Proficient in coaching/mentoring.
- Ability to coach at all levels.

Coaching and Mentoring

Description

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Aware

Needs practice

Competent

Proficient

Expert

Expert

- National business outcome focussed.
- Expert in coaching and mentoring at all levels.
- Experienced and/or published mentor.

Coaching and Mentoring

Description

Coaching and mentoring are valuable skills for salespeople, as they enhance both individual and team performance. A salesperson who can coach others helps foster a culture of continuous improvement within the team by sharing strategies, techniques, and insights that have led to their own success. This not only boosts the performance of less experienced team members but also creates a collaborative and supportive sales environment where everyone can thrive.

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Management Framework

A management framework provides the principles, practices, and guidelines you need to effectively lead and support your team, ensuring alignment with our organisational objectives and fostering a productive, engaged work environment.



Aware

Needs practice

Competent

Proficient

Expert

Aware but not demonstrated

- Aware of the requirement for managing performance and the appropriate tools but has not implemented with their team/individuals.
- Also demonstrates awareness of required standards of performance.
- Aware of importance of feedback but does not give to their team or others.

Managing performance

Key Elements

- SMART Goal Setting
Set Specific, Measurable, Achievable, Relevant, Time-bound goals collaboratively.
- Clear Expectations Communication
Define “what good looks like” and provide regular, honest feedback.
- Regular Performance Reviews
Conduct assessments and ensure Personal Development Plans are established.
- Support for Underperformers
Implement Performance Improvement Plans to assist struggling colleagues.
- Development of Top Performers
Collaborate with high achievers to enhance skills and stretch capabilities.
- Increases Productivity
Establishes a clear, consistent working system to boost overall productivity.
- Feedback Opportunities
Facilitate 360-degree feedback to clarify roles and address employee needs.
- Leadership Development
Foster the development of future leaders within the organisation

Description

Managing Performance is about helping people perform to the best of their abilities in alignment with the organisation’s goals.

Aware

Needs practice

Competent

Proficient

Expert

Needs Practice

- Has limited experience of directly managing others performance.
- Some experience of giving feedback but could be more structured.
- Some experience of managing against targets but not built PDP/PIP themselves.
- Sometimes avoids giving developmental feedback.

Managing performance

Key Elements

- SMART Goal Setting
Set Specific, Measurable, Achievable, Relevant, Time-bound goals collaboratively.
- Clear Expectations Communication
Define “what good looks like” and provide regular, honest feedback.
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Description

Managing Performance is about helping people perform to the best of their abilities in alignment with the organisation’s goals.

Aware

Needs practice

Competent

Proficient

Expert

Competent

- Experienced in building PDP/PIPs and managing their teams performance.
- Can demonstrate driving performance improvements.
- Understanding of coaching and delivered limited coaching sessions.
- Proficient in giving feedback. Addressing lower performance in team.

Managing performance

Key Elements

- SMART Goal Setting
Set Specific, Measurable, Achievable, Relevant, Time-bound goals collaboratively.
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Facilitate 360-degree feedback to clarify roles and address employee needs.
- Leadership Development
Foster the development of future leaders within the organisation

Description

Managing Performance is about helping people perform to the best of their abilities in alignment with the organisation’s goals.

Aware

Needs practice

Competent

Proficient

Expert

Proficient

- Strong knowledge of managing under/over performance.
- Understanding of feedback models and has regular feedback sessions in place with team.
- Has plans in place for lower and stronger performers in team.
- Good understanding of coaching and regularly using with own team and others.

Managing performance

Key Elements

- SMART Goal Setting
Set Specific, Measurable, Achievable, Relevant, Time-bound goals collaboratively.
- Clear Expectations Communication
Define “what good looks like” and provide regular, honest feedback.
- Regular Performance Reviews
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- Leadership Development
Foster the development of future leaders within the organisation

Description

Managing Performance is about helping people perform to the best of their abilities in alignment with the organisation’s goals.

Aware

Needs practice

Competent

Proficient

Expert

Expert

- Strong focus on performance of own team and wider department.
- Regularly reviews performance and plans in place to manage for all of team.
- Delivers coaching directly to others but also coaches coaches.
- Fosters a strong feedback culture across own team and wider department.

Managing performance

Key Elements

- SMART Goal Setting
Set Specific, Measurable, Achievable, Relevant, Time-bound goals collaboratively.
- Clear Expectations Communication
Define “what good looks like” and provide regular, honest feedback.
- Regular Performance Reviews
Conduct assessments and ensure Personal Development Plans are established.
- Support for Underperformers
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- Leadership Development
Foster the development of future leaders within the organisation

Description

Managing Performance is about helping people perform to the best of their abilities in alignment with the organisation’s goals.

Aware

Needs practice

Competent

Proficient

Expert

Aware but not demonstrated

- Aware of the importance of being a strong leader and building team but focuses more on their own contribution.
- Does not encourage diversity in the team or help team to work together effectively.

Leading the Team

Key Elements

- **Establishing Culture**
Set expectations and hold team behaviors accountable.
- **Promoting Teamwork**
Unite team members toward common goals while balancing individual needs.
- **Decision-Making**
Address tough issues, set goals, and solve problems for team benefit.
- **Delegating Work**
Empower direct reports by delegating tasks and providing development opportunities.
- **Communicating**
Utilise various communication methods, encouraging two-way feedback.
- **Driving Employee Performance**
Recognise performance levels and leverage colleagues' skills for business goals.
- **Helping Others Grow**
Focus on personal and team development, seeking talent for business growth.
- **Inspiring Through Emotional Intelligence**
Use emotional intelligence and communication skills to motivate team members.

Description

Leading the Team focuses on being a great people manager. It's about motivating and empowering the team, communication, team building, addressing any issues, valuing diversity.

Aware

Needs practice

Competent

Proficient

Expert

Needs Practice

- Makes efforts to build team effectiveness but may not have structured approach.
- Can be seen as a friend rather than a manager/leader.
- Still learning to focus on team and their roles more than their own.
- Limited development as a leader. Encourages some diversity but can tend to remain in comfort zone.

Leading the Team

Key Elements

- **Establishing Culture**
Set expectations and hold team behaviors accountable.
- **Promoting Teamwork**
Unite team members toward common goals while balancing individual needs.
- **Decision-Making**
Address tough issues, set goals, and solve problems for team benefit.
- **Delegating Work**
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Aware

Needs practice

Competent

Proficient

Expert

Competent

- Focuses on own development as a leader. Seen by their team as a manager/leader.
- Has built effective team by leading by example and communicating clear expectations and standards.
- Demonstrates empowerment by delegating key tasks to develop team members.
- High level of trust between manager and team members.
- Takes active steps to ensure diversity of opinion/ input in team. Prioritises team building activities.

Leading the Team

Key Elements

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- **Promoting Teamwork**
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Aware

Needs practice

Competent

Proficient

Expert

Proficient

- Seen as a strong leader by peers and own manager.
- Takes proactive steps to take leadership responsibility across the department rather than just own team.
- Actively seeks out opportunities for team members to take on more responsibility which allows them to develop as a leader.
- Has plans in place to develop the diversity in the team and wider function and challenges when this is not followed.

Leading the Team

Key Elements

- **Establishing Culture**
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- **Promoting Teamwork**
Unite team members toward common goals while balancing individual needs.
- **Decision-Making**
Address tough issues, set goals, and solve problems for team benefit.
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Aware

Needs practice

Competent

Proficient

Expert

Expert

- Regularly steps up into leadership activity across the function and not just own team.
- Drives diversity through encouraging variety and having plans in place to address.
- Actively develops others through delegation and empowerment.
- Seen as a leader by own function and stakeholders in the wider business.

Leading the Team

Key Elements

- **Establishing Culture**
Set expectations and hold team behaviors accountable.
- **Promoting Teamwork**
Unite team members toward common goals while balancing individual needs.
- **Decision-Making**
Address tough issues, set goals, and solve problems for team benefit.
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Focus on personal and team development, seeking talent for business growth.
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Use emotional intelligence and communication skills to motivate team members.

Description

Leading the Team focuses on being a great people manager. It's about motivating and empowering the team, communication, team building, addressing any issues, valuing diversity.

Aware

Needs practice

Competent

Proficient

Expert

Aware but not demonstrated

- Understands the importance of recruiting and retaining key talent but is not taking proactive steps to contribute to this for the team or department.

Talent Management

Key Elements

- Performance Excellence
Commit to high standards and cultivate a culture of excellence.
- Lifelong Learning Mindset
Embrace continuous education and skill development for personal and professional growth.
- Diversity Awareness
Recognise and promote the value of diversity and inclusivity within the workforce.
- Talent Acquisition
Attract and select top talent that aligns with organisational goals.
- Relationship Building
Develop strong networks to create talent pools and foster collaboration.
- Leadership Development
Cultivate leadership qualities in oneself and others to prepare for future challenges.
- Effective Performance Management
Monitor and enhance performance through constructive feedback.
- Employee Engagement:
Foster a motivating environment where team members feel valued and committed.
- Retention Strategies:
Implement practices that effectively retain top talent within the organisation.

Description

Talent management involves actions taken to attract, identify, develop, engage, retain, and deploy individuals who are valuable to an organisation.

Aware

Needs practice

Competent

Proficient

Expert

Needs Practice

- Has some experience of recruitment but is still learning.
- Understands the key attributes and skills required for high performance and can identify in current team but not demonstrated outside team/department.
- Evidence of career conversations but does not have structured approach in place.

Talent Management

Key Elements

- Performance Excellence
Commit to high standards and cultivate a culture of excellence.
- Lifelong Learning Mindset
Embrace continuous education and skill development for personal and professional growth.
- Diversity Awareness
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- Talent Acquisition
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Description

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Aware

Needs practice

Competent

Proficient

Expert

Competent

- Experienced interviewer with track record of recruiting high performers into the business.
- Actively mapping teams career paths and holding regular career conversations.
- Proactively identifies opportunities for team members.
- Builds strong induction and development plans for new team members.

Talent Management

Key Elements

- Performance Excellence
Commit to high standards and cultivate a culture of excellence.
- Lifelong Learning Mindset
Embrace continuous education and skill development for personal and professional growth.
- Diversity Awareness
Recognise and promote the value of diversity and inclusivity within the workforce.
- Talent Acquisition
Attract and select top talent that aligns with organisational goals.
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Implement practices that effectively retain top talent within the organisation.

Description

Talent management involves actions taken to attract, identify, develop, engage, retain, and deploy individuals who are valuable to an organisation.

Aware

Needs practice

Competent

Proficient

Expert

Proficient

- Can evidence their involvement in the career development of high performers across the department.
- Has structured career plans in place for all of team and also contributes to those of the wider team.
- Strong involvement in building induction and recruitment strategies in the team/department.

Talent Management

Key Elements

- Performance Excellence
Commit to high standards and cultivate a culture of excellence.
- Lifelong Learning Mindset
Embrace continuous education and skill development for personal and professional growth.
- Diversity Awareness
Recognise and promote the value of diversity and inclusivity within the workforce.
- Talent Acquisition
Attract and select top talent that aligns with organisational goals.
- Relationship Building
Develop strong networks to create talent pools and foster collaboration.
- Leadership Development
Cultivate leadership qualities in oneself and others to prepare for future challenges.
- Effective Performance Management
Monitor and enhance performance through constructive feedback.
- Employee Engagement:
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- Retention Strategies:
Implement practices that effectively retain top talent within the organisation.

Description

Talent management involves actions taken to attract, identify, develop, engage, retain, and deploy individuals who are valuable to an organisation

Aware

Needs practice

Competent

Proficient

Expert

Expert

- Has talent strategy in place for team/department with focus on skills and roles needed in 1-5 years.
- Proactively identifies potential talent internally and externally.
- Highly skilled interviewer with proven track record of success.

Talent Management

Key Elements

- Performance Excellence
Commit to high standards and cultivate a culture of excellence.
- Lifelong Learning Mindset
Embrace continuous education and skill development for personal and professional growth.
- Diversity Awareness
Recognise and promote the value of diversity and inclusivity within the workforce.
- Talent Acquisition
Attract and select top talent that aligns with organisational goals.
- Relationship Building
Develop strong networks to create talent pools and foster collaboration.
- Leadership Development
Cultivate leadership qualities in oneself and others to prepare for future challenges.
- Effective Performance Management
Monitor and enhance performance through constructive feedback.
- Employee Engagement:
Foster a motivating environment where team members feel valued and committed.
- Retention Strategies:
Implement practices that effectively retain top talent within the organisation.

Description

Talent management involves actions taken to attract, identify, develop, engage, retain, and deploy individuals who are valuable to an organisation

Aware

Needs practice

Competent

Proficient

Expert

Aware but not demonstrated

- Has awareness of principles of change/continuous improvement and strategic thinking but currently delivering at operational level, focused on the BAU of own role.

Strategic Thinking

Key Elements

- Analytical Skills
Break down complex situations and assess critical factors.
- Pattern Recognition
Identify trends to inform decision-making.
- Future Planning
Envision future scenarios based on current actions.
- Opportunity Identification
Spot potential growth and improvement opportunities.
- Risk Assessment
Evaluate threats and challenges to mitigate risks.
- Creative Problem-Solving
Develop innovative solutions aligned with long-term goals.
- Decision-Making
Make informed choices considering short- and long-term impacts.
- Adaptability
Adjust strategies based on changing circumstances and new information.

Description

Strategic thinking involves analysing situations and anticipating potential long-term outcomes. It transcends everyday problem-solving by considering both immediate and future implications of decisions. This skill is essential for navigating challenges and seizing opportunities, benefiting individuals across various roles—from executives and entrepreneurs to students and those pursuing personal growth.

Aware

Needs practice

Competent

Proficient

Expert

Needs Practice

- Proactively developing knowledge and experience in strategy and change.
- Some evidence of continuous improvement and contribution to projects.
- Can tend to focus more on BAU and current ways of working at times.

Strategic Thinking

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Aware

Needs practice

Competent

Proficient

Expert

Competent

- Regularly demonstrates a focus on change and improvement.
- Future focused with demonstratable evidence of contributing to and building strategies.
- Experienced at change projects and leading small/medium project teams.

Strategic Thinking

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Aware

Needs practice

Competent

Proficient

Expert

Proficient

- Constantly demonstrating thinking at a strategic level.
- Regularly building strategies and proposals for change and business improvement.
- Seen as expert by department and sought out to lead large scales projects and initiatives.
- Encourages team members to work in the same way.

Strategic Thinking

Key Elements

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Aware

Needs practice

Competent

Proficient

Expert

Expert

- Strong knowledge of strategy and change models and methodologies.
- Seen as change agent for the business and takes lead role in projects/initiatives in and out of own function.
- Consistently demonstrates thinking outside of box and focus on future rather than just current state.

Strategic Thinking

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Aware

Needs practice

Competent

Proficient

Expert

Aware but not demonstrated

- Understands who key stakeholders are but can struggle with relationship management.
- Often needs help with managing/influencing more challenging/senior stakeholders.
- Can tend to use same style with everyone.
- Can shy away from difficult conversations.
- Escalates a lot to their manager.

Communication

Key Elements

- **Effective Listener**
Actively listens to team members to understand their perspectives.
- **Timely Communicator**
Chooses the right time and method for communication.
- **Employee Accommodator**
Adapts communication to meet the needs of team members.
- **Transparent Leader**
Shares information openly to build trust.
- **Reinforcer of Key Messages**
Repeats important points to ensure understanding.
- **Clear Caller to Action**
Sets specific expectations and next steps.
- **Approachable Presence**
Remains available and accessible to the team.
- **Future-Oriented Thinker**
Considers long-term implications in communications.

Description

Strong communication is essential for effective leadership, characterized by clarity, vision, and empathy. Managers cultivate robust communication skills—both verbal and non-verbal—across various platforms, including in-person interactions, video calls, emails, and messages. Good communication enables managers to clearly explain tasks, understand team progress, resolve conflicts, and align expectations.

Aware

Needs practice

Competent

Proficient

Expert

Needs Practice

- Sometimes needs help with managing/influencing more challenging/senior stakeholders.
- Is developing influencing skills and proactively seeking support with this.
- Understands the requirement for different approaches.
- Avoids difficult conversations with some people. More comfortable working with junior stakeholders.

Communication

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Aware

Needs practice

Competent

Proficient

Expert

Competent

- Understands stakeholders and demonstrates flexing their style to suit accordingly.
- Will face into difficult conversations on regular basis.
- Competent with senior stakeholders but my still require some support with this.

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Aware

Needs practice

Competent

Proficient

Expert

Proficient

- Strong knowledge of influencing approaches and proven track record of getting buy in from challenging stakeholders.
- Completes regular stakeholder analysis. Confident at dealing with very senior stakeholders and understands how to manage them.
- Highly skilled at delivering difficult or bad messages on behalf of the department.

Communication

Key Elements

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Aware

Needs practice

Competent

Proficient

Expert

Expert

- Highly experienced working with stakeholders at all level up to C suite.
- Regularly communicates at all levels on behalf of the business.
- Delivers difficult messages to large groups/teams confidentially.
- Has communication strategy for their team/ department.
- regularly demonstrates various styles of influencing with proven results.

Communication

Key Elements

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Roles Framework

Discover the roles available at each stage of your sales career.





Level 1

These are the roles available for a
individua at Level 1.



Associate Business
development manager
- Enteral Nutrion



Associate Business
Development Manager
- Calea



Level 2

These are the roles available for a
individual at Level 2.



Business Development
Manager - Entxeral
Nutrition Contracts



Business Development
Manager - Enteral
Nutrition New Business



Business Development
Manager - Phama UK



Business Development
Manager - Calea



Business
Development Manager
- Parenteral Nutrition



Business Development
Manager - Key Account
Manager Pharma Ireland



Community
Sales Representative
Nutrition Ireland



Hospital
Sales Representative
Nutrition Ireland



Level 3

These are the roles available for a
individual at Level 3.



Senior Business
Development Manager
Pharma



Senior Business
Development Manager
Calea



Senior Business
Development Manager
EN Contracts



Senior Business
Development Manager
- Enteral Nutrition
New Business



Senior Business
Development Manager-
Parenteral Nutrition



Senior Business
Development Manager
- Key Account Manager
Pharma Ireland



Senior Community Sales
Representative Nutrition
Ireland



Senior Hospital Sales
Representative Nutrition
Ireland



Wholesale Manager
Enteral Nutrition



Level 4

These are the roles available for a
individual at Level 4.



Regional Sales Manager
EN Contracts



Regional Sales Manager
EN New Business



Level 5

These are the roles available for a
individual at Level 5.



National Sales Manager
Calea



National Sales Manager
Pharma UK



National Sales Manager
EN Contracts



National Sales Manager
- Enteral Nutrition New
Business



National Sales Manager
- Parenteral Nutrition



National Sales Manager
Nutrition Ireland



National Sales Manager
Pharma Ireland



Level 6

These are the roles available for a
individual at Level 6.



Sales Director UK



Director Calea
and Nursing



Commercial Manager Level 1

These are the roles available
for a Level one Commercial
Manager individual.



Commercial Manager
Pharma UK



Commercial Manager
EN UK



Commercial Manager
PN UK



Commercial Manager Level 2

These are the roles available
for a Level two Commercial
Manager individual.



Senior Commercial
Manager Pharma UK



Senior Commercial
Manager EN UK



Senior Commercial
Manager PN UK