



Inside Sales Representative Self-Assessment

The purpose of this self-assessment is to allow you to identify your level of proficiency in the competencies targeted by the CEP program. (Competencies are observable behaviors based on related knowledge, skills and abilities required to perform acceptably “on the job.”) A national study of the job of the inside sales representative identified these competencies as being essential to effective performance on the job.

For each competency listed, please indicate your level of proficiency and the frequency with which you perform this activity by circling the appropriate numbers on the rating scales shown below.

Proficiency

How proficient are you in this competency?

- (0) Not sure
- (1) Not at all proficient
- (2) Somewhat proficient
- (3) Moderately proficient
- (4) Very proficient

Frequency

How often do you perform this activity?

- (0) Never
- (1) Monthly or less
- (2) Weekly
- (3) Daily

This self-assessment will help you to evaluate your relative strengths and weaknesses and identify areas in which you may wish to pursue further study, training, or experience prior to completing the Certified Electrical Professional certification exam. Both frequency and proficiency should be considered in this evaluation. You may be “rusty” in activities that are not part of your current job or there may be some activities in which you have had little experience thus far.

After determining your relative strengths and weaknesses, make a list of the competencies in which you would like to gain greater expertise. Consult NAED and your company’s human resources or training manager for training options including courses, mentoring, etc. available to you.

You can learn more about the CEP at our website: www.naed-cep.org. Or you can contact us with our CEP email address: certification@naed.org.

Name: _____

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Competency	Proficiency	Frequency
I. Selling Products and Services		
A. Analyze customer requests by identifying the products, services, or technical information required to address the customer's situation.	0 1 2 3 4	0 1 2 3
B. Respond to customer requests by searching pertinent information resources for technical information needed to enable the customer to make an appropriate buying decision.	0 1 2 3 4	0 1 2 3
C. Respond to customer requests by providing accurate and timely technical information to facilitate appropriate buying decisions.	0 1 2 3 4	0 1 2 3
D. Provide quote to customer by providing accurate bills of materials, using pricing matrices based on quantity, volume, project size, competitive environment and existing customer agreements, to ensure mutual benefit for customer and company.	0 1 2 3 4	0 1 2 3
E. Produce sales order by checking product, price, availability and service to determine if cross-referencing is appropriate.	0 1 2 3 4	0 1 2 3
F. Produce sales order by cross referencing equivalent or superior products and services to best meet customer needs.	0 1 2 3 4	0 1 2 3
G. Increase sales by reviewing customer bill of materials to determine if additional products and/or services are needed.	0 1 2 3 4	0 1 2 3
H. Enhance sales order by suggesting alternate products and services, and explaining their features and benefits, to promote purchases that fulfill customer's needs and accomplish company objectives.	0 1 2 3 4	0 1 2 3

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Competency	Proficiency	Frequency
I. Complete sales order by communicating proposals for products and/or services, as requested, to customer to facilitate the buying decision.	0 1 2 3 4	0 1 2 3
J. Respond to sales opportunity by communicating appropriate leads to outside sales representative in a timely manner to assist in generating additional sales.	0 1 2 3 4	0 1 2 3
K. Facilitate the sales process by maintaining ongoing communication with outside sales representatives regarding customer status, problems, etc. to support a positive customer relationship.	0 1 2 3 4	0 1 2 3
L. Meet company sales objectives by negotiating and securing special pricing for customer, using vendors and internal quotes department, to enhance company and customer margins.	0 1 2 3 4	0 1 2 3
M. Facilitate future sales by accurately documenting customer's special pricing in company systems for future reference in quoting and selling products and services.	0 1 2 3 4	0 1 2 3
II. Preparing, Processing and Managing Sales Orders		
A. Prepare accurate sales orders by reviewing customer, product and service information to meet customer needs and comply with company policies and standards.	0 1 2 3 4	0 1 2 3
B. Process sales orders by entering accurate customer, product and service order data into the company system to initiate timely and efficient order processing.	0 1 2 3 4	0 1 2 3

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Competency	Proficiency	Frequency
C. Manage sales orders by following-up on orders containing products or services that require special attention to ensure appropriate and efficient order processing.	0 1 2 3 4	0 1 2 3
D. Manage orders by determining sales priorities based on time sensitivities, customer profile, order complexity, current inventory levels and purchasing cycles to effectively manage customer expectations.	0 1 2 3 4	0 1 2 3
E. Manage orders by identifying special situations, based on information provided by the customer, to permit appropriate actions that address the situation.	0 1 2 3 4	0 1 2 3
F. Meet customer needs by leveraging internal and external resources, and offering effective solutions and alternatives to enhance customer satisfaction.	0 1 2 3 4	0 1 2 3
G. Facilitate order fulfillment by expediting processing with vendors (including direct orders) and coordinating with purchasing department to promote efficient order resolution.	0 1 2 3 4	0 1 2 3
H. Provide effective oversight of open sales orders by notifying customers of status and ship dates to allow them to better manage their resources.	0 1 2 3 4	0 1 2 3
I. Facilitate order fulfillment by communicating in a timely manner special instructions and situations to ensure that internal and external customer needs are met.	0 1 2 3 4	0 1 2 3
J. Facilitate order fulfillment by following-up in a timely manner to confirm that appropriate action has been taken in special situations.	0 1 2 3 4	0 1 2 3

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Competency	Proficiency	Frequency
K. Manage customer expectations by communicating order fulfillment issues (backorders, price changes, etc.) and providing timely information that allows customers to better allocate their resources.	0 1 2 3 4	0 1 2 3
L. Process customer requests for returns by obtaining information, communicating company policies, and offering alternatives, actions and solutions to maximize customer satisfaction.	0 1 2 3 4	0 1 2 3
M. Analyze the reasons for return requests and cancellations by asking questions and listening to discover opportunities for product and service upsales and resales.	0 1 2 3 4	0 1 2 3
N. Provide support for future sales by identifying stock deficiencies, anticipated special buys and new products based on observed trends and sales activities to improve order fulfillment.	0 1 2 3 4	0 1 2 3
III. Enhancing Customer Relationships and Services		
A. Develop customer relationships by promoting upcoming opportunities (special events, education, etc.) to encourage participation and increase sales of new and existing products and services.	0 1 2 3 4	0 1 2 3
B. Maximize customer satisfaction by proactively informing customers of operational exceptions (inside sales representative availability, changes in business hours, weather delays, etc.) to minimize the impact on company/customer interactions.	0 1 2 3 4	0 1 2 3

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Competency	Proficiency	Frequency
C. Enhance customer service by communicating relevant product and service information (product availability, price changes, recalls, etc.) to enable customers to make appropriate business decisions and to maximize sales and minimize returns.	0 1 2 3 4	0 1 2 3
D. Manage the company-customer relationship by documenting customer specific information to keep colleagues and supervisors informed and better able to serve customers.	0 1 2 3 4	0 1 2 3
E. Manage customer-company relationships by advising the appropriate departments of special customer situations (credit hold, credit needs, etc.) in a timely fashion to anticipate problems and minimize delays.	0 1 2 3 4	0 1 2 3
F. Provide support for future sales by referring new and potential customers, along with background information, to the sales manager to assist in building customer relationships.	0 1 2 3 4	0 1 2 3
G. Address sales opportunities or customer service issues by communicating relevant information to outside sales representatives to maximize sales or to obtain assistance in addressing problems and finding solutions.	0 1 2 3 4	0 1 2 3
IV. Using Company and Industry Resources		
A. Maintain knowledge of products and services, industry developments, and company operations through independent research and by participating in training and development activities to provide superior customer service.	0 1 2 3 4	0 1 2 3

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Competency	Proficiency	Frequency
B. Maximize efficiency and minimize company costs by making use of internal and external resources (e.g., training and development resources) to meet both customer and company objectives.	0 1 2 3 4	0 1 2 3
V. Using Personal Resources		
A. Maintain positive relationships with co-workers and vendors by interacting with them in a courteous, professional, and ethical manner to facilitate teamwork and the accomplishment of company goals.	0 1 2 3 4	0 1 2 3
B. Maintain customer relationships by interacting with customers in a courteous, professional, and ethical manner to enhance company reputation and maximize sales of products and services.	0 1 2 3 4	0 1 2 3
C. Support order processing by applying written, verbal and computational skills to ensure accurate transactions between company and customers.	0 1 2 3 4	0 1 2 3
D. Meet sales objectives by communicating the value of company products and services to customers to negotiate the best outcomes for company and customer.	0 1 2 3 4	0 1 2 3
E. Meet sales objectives by adjusting and adapting sales and negotiating techniques based on customer-specific information.	0 1 2 3 4	0 1 2 3
F. Negotiate sales by applying basic business principles (profit and loss, expenses, markups, commissions, etc.) to profitably conduct business.	0 1 2 3 4	0 1 2 3

