



## Outside Sales Representative Self-Assessment

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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 outside 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](http://www.naed-cep.org). Or you can contact us with our CEP email address: [certification@naed.org](mailto:certification@naed.org).

Name: \_\_\_\_\_

Date: \_\_\_\_\_

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Skills and Knowledge	Competency/ Proficiency	Frequency
<b>I. Selling Products and Services</b>		
A. Implement components of the sales process by prospecting, qualifying, developing, selling, quoting, following up, etc. to meet sales goals and build customer relationships.	0 1 2 3 4	0 1 2 3
B. Work with customers to establish goals that meet both customer and company objectives.	0 1 2 3 4	0 1 2 3
C. Participate in company sales promotions and marketing programs, adhering to prescribed procedures and targets, in order to achieve company goals.	0 1 2 3 4	0 1 2 3
D. Obtain accurate and complete project-specific information from customer by discussing the project, visiting job sites/customer locations, reviewing plans, etc. to facilitate better product choices and applications.	0 1 2 3 4	0 1 2 3
E. Analyze project-specific information by reviewing job requirements and order specifications to determine necessary product and/or technical information to be supplied to the customer or specifier.	0 1 2 3 4	0 1 2 3
F. Analyze complete project specifications from customer by reviewing job requirements and order specifications to produce a comprehensive bill of materials that meets customer requirements.	0 1 2 3 4	0 1 2 3
G. Collaborate with inside sales representatives and other staff in the establishment of customer-specific prices and external vendor support by providing accurate account information to secure business and maximize profitability.	0 1 2 3 4	0 1 2 3
H. Develop close working relationships with vendor partners via communication, strategic planning, joint calls, training, and proactive project involvement to maximize products and services sale opportunities.	0 1 2 3 4	0 1 2 3

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Skills and Knowledge	Competency/ Proficiency	Frequency
I. Identify sales opportunities by cross-referencing competitive brands with company preferred brands to increase market share and profitability and to efficiently serve customers.	0 1 2 3 4	0 1 2 3
J. Pursue additional sales by recommending associated or upgraded products and services to the customer to better meet customer needs and increase sales.	0 1 2 3 4	0 1 2 3
K. Review customer quotes by checking prices and terms and conditions (e.g., expiration dates, freight, discounts) to ensure accuracy and completeness.	0 1 2 3 4	0 1 2 3
L. Provide customer terms and conditions by submitting documentation to the appropriate company departments to assist in the management of risk.	0 1 2 3 4	0 1 2 3
M. Introduce new products and services to customers by providing samples and information to keep customers informed of product development, industry trends and optimal solutions.	0 1 2 3 4	0 1 2 3
N. Collaborate with sales support staff (e.g., inside sales representative, project manager, product specialist, quotes department) by jointly reviewing customer's project specifications, bill of materials, etc. to develop and implement accurate sales quotes.	0 1 2 3 4	0 1 2 3
<b>II. Managing Accounts</b>		
A. Enhance customers' business by informing them of project opportunities to increase their profitability and company sales.	0 1 2 3 4	0 1 2 3
B. Obtain commitment from customer by securing long-term contracts on specific projects to decrease customer's costs and maximize sales efficiency and company profitability.	0 1 2 3 4	0 1 2 3

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<b>Skills and Knowledge</b>	<b>Competency/ Proficiency</b>	<b>Frequency</b>
C. Evaluate accounts for revenue and profit potential by reviewing customer-specific information, order history, etc. in order to make appropriate and efficient time and resource commitment decisions.	0 1 2 3 4	0 1 2 3
D. Maintain customer information by providing data into defined company systems as required for effective account management.	0 1 2 3 4	0 1 2 3
E. Collaborate with credit department by jointly reviewing accounts receivable and overdue customer accounts to facilitate timely collection of payments due.	0 1 2 3 4	0 1 2 3
F. Write account plans after reviewing current information, dynamics, history, goals, etc. in order to produce a strategy for the maintenance and growth of the account.	0 1 2 3 4	0 1 2 3
G. Periodically revise account plans by reviewing current information, dynamics, history, goals, etc. to produce an up-to-date strategy for the maintenance and growth of the account.	0 1 2 3 4	0 1 2 3
H. Inform customers of the availability of products and services, delivery times, etc. by communicating in an effective and timely manner to meet established expectations.	0 1 2 3 4	0 1 2 3
I. Inform support staff of agreed upon expectations by communicating in an effective and timely manner to ensure that customer expectations are met.	0 1 2 3 4	0 1 2 3
J. Inform customer of the status (post sale) of processed orders, commitments, etc. by communicating in an effective and timely manner to ensure that expectations are met.	0 1 2 3 4	0 1 2 3
K. Inform the customer promptly about post-sale issues by communicating effectively in order to resolve problems in a timely manner.	0 1 2 3 4	0 1 2 3

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<b>Skills and Knowledge</b>	<b>Competency/ Proficiency</b>	<b>Frequency</b>
L. Obtain market intelligence (information about competitors, manufacturers, agents, buying influences, etc.) from customers and vendors by applying questioning and listening skills to successfully manage customer accounts and develop strategies to increase customer market share.	0 1 2 3 4	0 1 2 3
M. Inform internal staff of customer's policies and procedures (safety, confidentiality, gratuity, etc.) by communicating in an effective and timely manner to maintain a positive business relationship.	0 1 2 3 4	0 1 2 3
<b>III. Using Company and Industry Resources</b>		
A. Maintain current knowledge of products, services and trends (e.g., company, competitor, industry, and market) by participating in training, reviewing industry publications, making joint sales calls with vendor partners, and networking with industry associates to be a valuable asset to the customer and company and to achieve personal goals.	0 1 2 3 4	0 1 2 3
B. Maintain proficiency in the use of business technology by participating in training (e.g., company, industry, online, on-the-job, CD-ROM, universities) to maximize productivity and efficiency in communicating with associates, customers and vendor partners.	0 1 2 3 4	0 1 2 3
C. Maintain up-to-date knowledge of company systems, workflow, terms and conditions, policies, procedures, and goals by using company resources, training, sales meetings, and internal networking to maximize productivity and efficiency.	0 1 2 3 4	0 1 2 3
<b>IV. Using Personal Resources</b>		
A. Maintain business relationships by consistently interacting with vendors, colleagues, and customers in a courteous, professional, and ethical manner to support long-term and mutually beneficial interactions.	0 1 2 3 4	0 1 2 3

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Skills and Knowledge	Competency/ Proficiency	Frequency
B. Effectively articulate order details and information by applying written, verbal, and computational skills to ensure consistently accurate and competent transactions among company, customers, and vendors.	0 1 2 3 4	0 1 2 3
C. Effectively convey the value of company products, services and solutions by applying written, verbal, computational and presentation skills in order to negotiate the best sales outcomes for the company, vendors, and customers.	0 1 2 3 4	0 1 2 3
D. Negotiate with customers and vendors by applying basic business principles (profit and loss, expenses, margins, commissions, etc.) to profitably conduct business.	0 1 2 3 4	0 1 2 3
E. Effectively interact with customers and vendors by applying questioning and listening skills to identify needs and accurately and efficiently provide products, services, and solutions.	0 1 2 3 4	0 1 2 3

**Areas to strengthen my skills:**

Skills and Knowledge to address	Training options