Account Executive\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Position \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Manager\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ HR Partner\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Director\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

| **Competency** | **Focused Concentration** | **Description of Focused Concentration** | **AE2 Description** | **AE3 Description** | **Assessment**  *(to be filled out by Manager)* | **Self Directed**  *(to be filled out by Account Executive)* |
| --- | --- | --- | --- | --- | --- | --- |
| Sales Process Management | Business Acumen | Demonstrates knowledge and use of business, market, vertical and financial concepts such as, but not limited to, balance sheets, income statements, company profiles, research reports, market/vertical intelligence, annual reports, etc. Recognized by customers and coworkers internally and externally as a resource to understand market knowledge. | Has proficient knowledge and usage of business, financial, market and vertical tools. Uses financial knowledge to tie solutions to sponsor's pains and goals. Customer engages with the AE based on their proficient understanding of market knowledge. | Has advanced knowledge and usage of business, financial, market and vertical tools. Uses financial knowledge to tie Solutions to C Suite Stakeholder's pains and goals. Customers utilize the AE as a consultant based on their advanced understanding of market knowledge. | *Demonstrable Behaviour:*  *Positive Ideas:* |  |
| Capability / Situation Knowledge | Understands company capabilities across all lines of business and how these can effect specific business challenges and industries. Has an understanding of the issues facing specific job titles in a given industry. *Capability Knowledge - Knowing your offerings and understanding how the offerings help specific customers. Situational Knowledge - Understanding of the problems faced by specific job titles in an industry.* | Analyzes products and services and determines how they form solutions that solve customer business needs at a proficient level. Proficient ability to quantify value to the customer. Proficient situational knowledge. Proficient capability knowledge. | Instinctively speaks to solutions, not products at an advanced level. Advanced ability to quantify value to the customer. Advanced situational knowledge. Advanced capability knowledge. | *Demonstrable Behaviour:*  *Positive Ideas:* |  |
| Planning | Effective use of plans to strategically manage business. | With minimal guidance from Leadership proficient knowledge, creation and management of territory, pipeline and overall/potential business. Top X plans with minimal assistance from Management. | With no guidance from Leadership, advance knowledge, creation and management of territory, pipeline and overall/potential business. Advanced Top X plans. | *Demonstrable Behaviour:*  *Positive Ideas:* |  |
| Solution Selling | Applies and embraces the standard sales methodology in selling activities in order to manage business. | Proficient understanding of the concepts of Solution Selling.  Proficient utilization of Pain Chains, Mutual Action Plans, Power Sponsor Letters and Reference Letters. Ability to obtain Reference Letters from current customers. | Advanced, inherent understanding of the concepts of Solution Selling.  Anticipate the pains/issues and provide solutions before the customer is aware.  Proactively creates Pain Chains. Ease of obtaining agreement to Mutual Action Plans and Power Sponsor Letters. Ability to use and obtain Reference Letters from current customers with quantifiable results. Ease of connecting situational knowledge with Solution Selling principles. | *Demonstrable Behaviour:*  *Positive Ideas:* |  |
| Relationship Building / Management | Internal Relationships | Ability to build relationships with internal individuals and departments to manage business. | Advanced in influencing internal resources and processes in order to manage business. Support departments action requests without the involvement of Management. | Master in influencing internal resources and processes in order to move business forward and create out of the box solutions. AE engages with and is sought out by C Levels internally. Non traditional in approach to obtain solutions for customers | *Demonstrable Behaviour:*  *Positive Ideas:* |  |
| External Customer Relationships | Ability to build relationships with external individuals and departments to further business and obtain resources. | Advanced ability in forming relationships with multiple levels within organizations. Active participant/member in market networking event or group. Ease of obtaining meetings and attendance at events with customers. Advanced in influencing vendors in order to manage business. | Master in forming impactful and long lasting relationships with multiple levels within organizations. Proactively sought out and referred by C level influencers and decision makers to provide market/business intelligence and solutions. Master in influencing vendors in order to move business forward and create out of the box solutions. Forming impactful and long lasting vendor relationships. Vendors proactively engage AE in opportunities as they are viewed as masters in industry. Runs/organizer of a market networking event or group. Effortlessly obtains meetings and attendance at events with C Suite. | *Demonstrable Behaviour:*  *Positive Ideas:* |  |
| Communication / Influencing | Audience Analysis | The skill to pick up verbal and non-verbal cues and adjust the message and style to influence outcomes. Understanding of emotional buying response from customer. | Ability to think on their feet in certain circumstances. Opportunity to clarify understanding in customer interactions. Proficient understanding of the customer's buying cycle. | Ability to think on their feet. Paraphrases to ensure appropriate understanding during customer interactions. Advanced understanding of the customer's buying cycle in order to influence business decisions. | *Demonstrable Behaviour:*  *Positive Ideas:* |  |
| Communication Tools | Appropriate use of a wide variety of communication tools to reflect the diverse needs of audience and adjusts their approach and style to meet changing customer needs and personas | Proficient in using some communication tools.  Drives customer interactions with some reliance on content and some personal ability. Proficient use of personas and ability to communicate effectively to different types of personas. | Advanced in using a variety of communication tools dependent on audience and desired message. Commands the room. Advance understanding, use, action and communication with personas in order to move solutions forward. | *Demonstrable Behaviour:*  *Positive Ideas:* |  |
| Negotiate | Ability to overcome external and internal objections.  Understanding and utilization of BATNA in negotiations. Ability to obtain buy-in internally and externally. | Proficient understanding of contracts and legal components in order to negotiate with customers.  Understanding of common customer objections and common negotiation tactics in response to those objections. | Advanced understanding of contracts and legal components in order to negotiate with customers.  Proactively creates out of the box negotiation tactics with advanced use of BATNA. Skill to make individuals feel the contract and/or outcome is the best for them. Anticipates objections and create solutions to alleviate those concerns. | *Demonstrable Behaviour:*  *Positive Ideas:* |  |
| Ingenuity / Creativity | Market / Process Change | Ability to effectively embrace, understand, action and connect market and process change to business. | Proficient ability to recognize, understand and adapt solutions to market and process change. | Driving internal and external change by creating out of the box customer solutions. Advanced ability to recognize, understand and adapt business to market and process change. | *Demonstrable Behaviour:*  *Positive Ideas:* |  |
| Roadblocks | Anticipates, recognizes and is able to overcome external and internal obstacles/roadblocks. | Proficient ability to overcome obstacles/roadblocks during sales cycle without the assistance of Management.  Creates Pain Chains. | Limited number of obstacles/roadblocks during sales cycle as they were anticipated and resolved preemptively.  Proactively creates Pain Chains. | *Demonstrable Behaviour:*  *Positive Ideas:* |  |
| Creative Selling | Uses available tools and resources in unique ways to sell to current and potential customers in order to achieve goals. | Proficient use of standard company solutions to creatively solve customer business concerns. Engages internal and external resources to provide company standard solutions. Uses proficient techniques to prospect for potential business. | Advanced ability to envision unique, creative solutions demonstrating company value. Proactively and self sufficiently engages internal and external resources to provide out of the box solutions to customers.  Uses advanced and creative techniques to prospect for potential business. | *Demonstrable Behaviour:*  *Positive Ideas:* |  |
| Drive for Results | Drive/Ambition/Self Starter | Plan attainment Rewards and Recognition  Achievement of company and personal goals Maximizing results Self Motivation | **Consistently meets** plan. (S*uggested* 109% to 129% of plan) Advanced at achieving and exceeding goals that are set by the Leadership Team. Investigates and finds answers to questions and obstacles without the assistance of Management. | **Consistently exceeds** plan. (Suggested equal to or > 130% of plan) President Club. Industry, company and/or customer awards and recognition.  Master at setting, achieving and exceeding individual goals that are above sales goals and expectations. Obstacles are foreseen before they occur. | *Demonstrable Behaviour:*  *Positive Ideas:* |  |
| Competitive | Ability to recognize competition in marketplace. Having a strong desire to compete or succeed. | Advanced knowledge of key competitor offerings and works towards creating solutions to set company apart in marketplace. Success and positivity in team and personal competition. | Mastery knowledge of key competitor offerings within vertical and creates out of the box solutions that set company apart in the marketplace. Excels at team and personal competition. | *Demonstrable Behaviour:*  *Positive Ideas:* |  |
| New Business & Growth | Ability toobtain new, profitable, compliant, long lasting business. | Advanced at obtaining new, profitable, compliant, long lasting business. | Mastery in obtaining new, profitable, compliant, long lasting and unique business. | *Demonstrable Behaviour:*  *Positive Ideas:* |  |
| Intrinsically Motivated | Introspective in understanding personal areas for opportunities.  Self Learning/Education. Self Awareness of skillset. Self Motivation. | Advanced at achieving personal development goals. Active participant in creating personal development plans with Management. Active interest in self development. Aware of personal areas of improvement and opportunity. | Mastery at setting, achieving and exceeding own personal development goals. Does not wait for management nor annual reviews to create personal development plans. Aware of personal areas of improvement and opportunity. | *Demonstrable Behaviour:*  *Positive Ideas:* |  |