Sales Capabilities Framework

1. Initiating Conversations

The ability to pique interest and qualify prospects, with significantly different skill requirements between inbound (prospect-initiated) and outbound (salesperson-initiated) scenarios. It's common to find yourself between levels or stronger in some capabilities than others within a level. If you haven't performed certain aspects of this skill, assess yourself conservatively and consider your level of interest in those activities - this can provide helpful context for your self-assessment.

Level 1
- **Core Capability:**
  - Successfully handles interested prospects but avoids any proactive outreach
  - Relies on scripts and structured approaches for conversations

- **Inbound Capability:**
  - Handles walk-ins and incoming calls confidently
  - Responds effectively to inbound email inquiries
  - Manages website chat conversations

- **Outbound Capability:**
  - Hesitant to reach out proactively
  - Uncomfortable interrupting or redirecting conversations
  - Avoids outbound prospecting activities

- **Qualification Skills:**
  - Uses basic qualification checklists
  - Gathers essential information but may miss deeper insights
  - Struggles to guide conversation beyond prospect's initial request

Level 2
- **Core Capability:**
  - Masters inbound engagement while developing confidence in outbound situations
  - Adapts approaches based on situation and prospect type

- **Inbound Capability:**
  - Guides conversations beyond initial prospect interest
  - Turns basic inquiries into deeper discovery conversations
  - Controls conversation flow while maintaining rapport

- **Outbound Capability:**

- Handles warm outbound (referrals, networking events)
  - Interrupts politely in appropriate settings
  - Still hesitant in pure cold outreach situations

- **Qualification Skills:**
  - Naturally weaves qualification into flowing dialogue
  - Uncovers deeper needs beyond initial stated requirements
  - Adjusts qualification approach based on prospect type

Level 3
- **Core Capability:**
  - Excels equally at inbound and outbound engagement
  - Makes any interaction feel natural and valuable for prospect

- **Inbound Capability:**
  - Turns any inbound contact into strategic conversation
  - Immediately establishes control of conversation flow
  - Creates expanded opportunities from basic inquiries

- **Outbound Capability:**
  - Confidently interrupts at any level (including C-suite)
  - Creates interest in cold situations across any channel
  - Turns interruptions into welcomed conversations

- **Qualification Skills:**
  - Qualifies decisively while building strong rapport
  - Makes qualification feel like natural curiosity
  - Uncovers strategic opportunities beyond stated needs

2. Deepening Trust

The ability to build authentic relationships and demonstrate genuine capability, especially crucial in high-stakes situations. It's common to find yourself between levels or stronger in some capabilities than others within a level. If you haven't performed certain aspects of this skill, assess yourself conservatively and consider your level of interest in those activities - this can provide helpful context for your self-assessment.

Level 1
- **Core Capability:**
  - Maintains basic professional demeanor
  - Follows standard trust-building protocols
  - Relies on company credentials over personal connection

- **Relationship Building:**

- Builds surface-level rapport
  - Follows basic conversation guidelines
  - Maintains professional boundaries

- **Credibility Building:**
  - Presents basic company information accurately
  - Shares standard testimonials and case studies
  - Adheres to promised follow-up

- **Risk Management:**
  - Addresses obvious concerns when raised
  - Relies on standard guarantees and assurances
  - Struggles with complex risk discussions

Level 2
- **Core Capability:**
  - Creates genuine connections while maintaining professionalism
  - Balances personal and organizational trust building
  - Adapts approach based on stake levels

- **Relationship Building:**
  - Develops authentic rapport through shared interests
  - Shows genuine curiosity about client needs
  - Maintains appropriate long-term relationships

- **Credibility Building:**
  - Demonstrates deep product/service knowledge
  - Shares relevant experience and insights
  - Proactively addresses potential concerns

- **Risk Management:**
  - Identifies and addresses underlying concerns
  - Develops tailored risk mitigation strategies
  - Handles moderate-stakes situations effectively

Level 3
- **Core Capability:**
  - Builds deep trust rapidly in any situation
  - Makes others feel genuinely understood and valued
  - Transforms high-stakes concerns into stronger relationships

- **Relationship Building:**
  - Creates lasting connections at all organizational levels
  - Builds trust across entire buying committees

- Maintains trusted advisor status

- **Credibility Building:**
  - Establishes thought leadership position
  - Creates new trust-building frameworks
  - Develops organizational trust beyond personal relationships

- **Risk Management:**
  - Masterfully handles highest-stakes situations
  - Turns risk discussions into trust-building opportunities
  - Creates innovative risk mitigation approaches

3. Influencing and Closing

The ability to guide decisions by addressing both emotional and logical needs, especially in complex situations.

Level 1
- **Core Capability:**
  - Follows basic sales processes
  - Uses standard closing techniques
  - Relies on prepared materials

- **Need Analysis:**
  - Gathers basic requirements
  - Uses standard questions
  - Focuses on stated needs

- **Objection Handling:**
  - Uses standard responses
  - Addresses surface-level concerns
  - Struggles with complex objections

- **Closing Ability:**
  - Recognizes basic buying signals
  - Uses simple closing techniques
  - Comfortable with straightforward decisions

Level 2
- **Core Capability:**
  - Guides natural decision processes
  - Balances emotion and logic effectively
  - Adapts approach to different situations

- **Need Analysis:**
  - Uncovers deeper underlying needs
  - Connects different requirement areas
  - Anticipates unstated needs

- **Objection Handling:**
  - Prevents common objections proactively
  - Turns objections into opportunities
  - Handles emotional and logical concerns

- **Closing Ability:**
  - Creates natural closing moments
  - Guides complex decision processes
  - Maintains relationships through closing

Level 3
- **Core Capability:**
  - Makes complex decisions feel natural
  - Creates alignment at all stakeholder levels
  - Transforms concerns into reasons to move forward

- **Need Analysis:**
  - Uncovers strategic opportunities
  - Creates new value perspectives
  - Connects individual and organizational needs

- **Objection Handling:**
  - Transforms major obstacles
  - Creates new objection handling approaches
  - Builds stronger relationships through objections

- **Closing Ability:**
  - Orchestrates complex multi-stakeholder decisions
  - Creates urgency without pressure
  - Closes while enhancing relationships

4. Resilience in Rejection

The fundamental internal strength that enables persistence and growth, particularly important in high-rejection environments. It's common to find yourself between levels or stronger in some capabilities than others within a level. If you haven't performed certain aspects of this skill,

assess yourself conservatively and consider your level of interest in those activities - this can provide helpful context for your self-assessment.

Level 1
- **Core Capability:**
  - Maintains basic professional demeanor
  - Continues basic activities despite setbacks
  - Relies on external support for recovery

- **Response to Rejection:**
  - Takes rejection personally but hides it
  - Requires time to recover
  - Struggles to maintain momentum

- **Learning from Rejection:**
  - Gathers basic feedback when offered
  - Follows standard improvement processes
  - Makes obvious adjustments

- **Maintaining Performance:**
  - Returns to basic activities after recovery
  - Maintains standard activity levels
  - Performance fluctuates with rejection

Level 2
- **Core Capability:**
  - Maintains stable performance through rejection
  - Uses rejection as learning opportunity
  - Develops personal recovery strategies

- **Response to Rejection:**
  - Processes rejection objectively
  - Recovers quickly and naturally
  - Maintains professional relationships

- **Learning from Rejection:**
  - Actively seeks feedback from rejection
  - Identifies patterns and trends
  - Implements systematic improvements

- **Maintaining Performance:**
  - Maintains consistent activity levels
  - Adapts approach based on learning
  - Stable performance despite rejection

Level 3
- **Core Capability:**
  - Thrives on rejection as growth opportunity
  - Maintains peak performance regardless of outcomes
  - Helps others develop resilience

- **Response to Rejection:**
  - Views rejection as valuable information
  - Uses rejection to strengthen relationships
  - Maintains positive, genuine mindset

- **Learning from Rejection:**
  - Creates new approaches from rejection patterns
  - Develops team learning systems
  - Transforms rejection into innovation

- **Maintaining Performance:**
  - Improves performance through rejection
  - Creates new performance standards
  - Inspires others through example

Marketing Capabilities Framework

1. Customer Segmentation and Understanding

The ability to research potential customer markets and hone in on ideal customer markets and customers. It's common to find yourself between levels or stronger in some capabilities than others within a level. If you haven't performed certain aspects of this skill, assess yourself conservatively and consider your level of interest in those activities - this can provide helpful context for your self-assessment.

Level 1
- **Core Capability:**
  - Understands current customer profiles
  - Works with established market segments
  - Relies on existing customer data and insights

- **Research Capability:**
  - Gathers basic customer demographic information
  - Uses standard data collection methods
  - Follows existing research frameworks

- **Analysis Capability:**
  - Identifies clear patterns in customer data
  - Recognizes obvious market segments
  - Documents basic customer characteristics

- **Application Skills:**
  - Uses established customer profiles
  - Maintains existing segmentation
  - Applies standard targeting criteria

Level 2
- **Core Capability:**
  - Identifies new segments within existing markets
  - Develops deeper understanding of motivations
  - Connects market trends to customer behavior

- **Research Capability:**
  - Conducts comprehensive customer research
  - Combines multiple data sources
  - Develops custom research approaches

- **Analysis Capability:**
  - Identifies subtle patterns in customer behavior
  - Discovers underserved segments
  - Creates detailed segment profiles

- **Application Skills:**
  - Adapts strategies for different segments
  - Recommends targeting adjustments
  - Identifies growth opportunities

Level 3
- **Core Capability:**
  - Discovers new market opportunities
  - Anticipates shifting customer needs
  - Creates innovative segmentation approaches

- **Research Capability:**
  - Designs sophisticated research methodologies
  - Uncovers hidden market insights
  - Identifies emerging trends before competitors

- **Analysis Capability:**

- Creates predictive customer models
  - Develops new segmentation frameworks
  - Connects market insights to business strategy

- **Application Skills:**
  - Guides strategic market entry decisions
  - Develops new market opportunities
  - Creates scalable segmentation systems

2. Messaging and Storytelling

The ability to craft communication that resonates with ideal customers through all stages of the buyer's journey.

Level 1
- **Core Capability:**
  - Uses established messaging frameworks
  - Follows basic storytelling structures
  - Maintains consistent brand voice

- **Message Development:**
  - Adapts existing message templates
  - Identifies key selling points
  - Uses standard value propositions

- **Content Creation:**
  - Produces basic marketing materials
  - Follows established formats
  - Maintains consistent messaging

- **Communication Effectiveness:**
  - Measures standard engagement metrics
  - Gathers basic feedback
  - Makes simple adjustments

Level 2
- **Core Capability:**
  - Creates compelling customer-focused messages
  - Develops engaging story frameworks
  - Adapts tone for different audiences

- **Message Development:**
  - Creates unique value propositions
  - Develops audience-specific messaging

- Aligns messages to buyer journey

- **Content Creation:**
  - Produces diverse content types
  - Adapts style for different channels
  - Creates engaging narratives

- **Communication Effectiveness:**
  - Analyzes message performance
  - Tests different approaches
  - Optimizes based on results

Level 3
- **Core Capability:**
  - Innovates new messaging approaches
  - Creates powerful brand narratives
  - Shapes market conversations

- **Message Development:**
  - Develops breakthrough positioning
  - Creates new messaging frameworks
  - Anticipates market evolution

- **Content Creation:**
  - Sets new content standards
  - Creates thought leadership
  - Develops innovative formats

- **Communication Effectiveness:**
  - Creates new testing methodologies
  - Develops predictive models
  - Sets industry benchmarks

3. Lead Channel Testing

The ability to find, manage and optimize different ways of getting leads for your business. It's common to find yourself between levels or stronger in some capabilities than others within a level. If you haven't performed certain aspects of this skill, assess yourself conservatively and

consider your level of interest in those activities - this can provide helpful context for your self-assessment.

Level 1
- **Core Capability:**
  - Manages a single, straightforward lead channel
  - Follows established ways of getting leads
  - Makes simple adjustments based on results

- **Channel Management:**
  - Maintains consistent activity in one channel
  - Handles day-to-day channel operations
  - Responds to basic channel issues

- **Testing Approach:**
  - Tries obvious variations within the channel
  - Notices what works and what doesn't
  - Makes straightforward improvements

- **Optimization Skills:**
  - Keeps the channel running smoothly
  - Fixes clear problems when they arise
  - Maintains steady lead flow

Level 2
- **Core Capability:**
  - Manages several lead channels at once
  - Understands how different channels work together
  - Actively looks for ways to improve results

- **Channel Management:**
  - Runs multiple channels effectively
  - Balances efforts across channels
  - Handles more complex channel issues

- **Testing Approach:**
  - Plans and executes channel experiments
  - Tests different approaches systematically
  - Learns from both success and failure

- **Optimization Skills:**
  - Improves channel performance over time
  - Finds ways channels can work together
  - Develops better processes based on learning

Level 3
- **Core Capability:**
  - Masters complex multi-channel approach
  - Creates new ways to get leads
  - Builds comprehensive lead generation systems

- **Channel Management:**
  - Orchestrates many channels working together
  - Develops new channel opportunities
  - Creates scalable channel processes

- **Testing Approach:**
  - Creates innovative testing methods
  - Anticipates market changes
  - Develops new best practices

- **Optimization Skills:**
  - Maximizes results across all channels
  - Creates breakthrough improvements
  - Builds systems others can follow

4. Marketing Math

The ability to measure and understand the financial side of marketing: tracking costs, understanding what you're getting for your money, and ensuring marketing efforts are profitable. It's common to find yourself between levels or stronger in some capabilities than others within a level. If you haven't performed certain aspects of this skill, assess yourself conservatively and consider your level of interest in those activities - this can provide helpful context for your self-assessment.

Level 1
- **Core Capability:**
  - Tracks basic numbers (costs, leads, sales)

- Understands simple marketing costs
  - Makes basic profitability calculations

- **Metric Tracking:**
  - Records key numbers regularly
  - Uses basic tracking systems
  - Maintains consistent records

- **Cost Analysis:**
  - Calculates cost per lead
  - Understands basic expenses
  - Tracks simple conversion rates

- **Decision Making:**
  - Makes obvious cost-saving choices
  - Stays within set budgets
  - Recognizes clear profit/loss situations

Level 2
- **Core Capability:**
  - Analyzes marketing costs in detail
  - Understands profitability across channels
  - Makes decisions based on numbers

- **Metric Tracking:**
  - Develops better tracking systems
  - Monitors multiple performance metrics
  - Identifies important patterns

- **Cost Analysis:**
  - Calculates customer lifetime value
  - Understands costs at each funnel stage
  - Analyzes return on marketing spend

- **Decision Making:**
  - Allocates budget based on results
  - Makes trade-offs between channels
  - Predicts likely returns

Level 3
- **Core Capability:**
  - Masters complex marketing economics
  - Optimizes profitability across systems
  - Creates predictable revenue models

- **Metric Tracking:**
  - Builds comprehensive tracking systems
  - Creates new ways to measure success
  - Develops predictive indicators

- **Cost Analysis:**
  - Understands complex marketing economics
  - Creates sophisticated ROI models
  - Optimizes entire marketing system

- **Decision Making:**
  - Makes strategic investment decisions
  - Optimizes for long-term growth
  - Builds scalable profitable systems

Scoring Your Assessment

Calculating Your Scores
For each skill, your level corresponds to points:
- Level 1 = 1 point
- Level 2 = 2 points
- Level 3 = 3 points

Sales Skills Score
Add up your points from:
1. Initiating Conversations
2. Deepening Trust
3. Influencing and Closing
4. Resilience in Rejection

Total possible sales score: 12 points
Your Sales Score: _____

Marketing Skills Score
Add up your points from:
1. Customer Segmentation and Understanding
2. Messaging and Storytelling

3. Lead Channel Testing
4. Marketing Math

Total possible marketing score: 12 points
Your Marketing Score: _____

Understanding Your Score Range
Your scores will fall into these ranges:
- Primary Focus: 9-12 points
- Moderate Focus: 5-8 points
- Limited: 1-4 points

Common profiles based on these ranges:
Here's the scoring for all 7 profiles:

Primary Sales Focus with Limited Marketing
Sales Score: 9-12 points
Marketing Score: 1-4 points

Primary Sales Focus with Moderate Marketing
Sales Score: 9-12 points
Marketing Score: 5-8 points

Moderate Sales Focus with Limited Marketing
Sales Score: 5-8 points
Marketing Score: 1-4 points

Moderate Focus in Both Sales and Marketing
Sales Score: 5-8 points
Marketing Score: 5-8 points

Moderate Marketing Focus with Limited Sales
Sales Score: 1-4 points
Marketing Score: 5-8 points

Primary Marketing Focus with Moderate Sales
Sales Score: 5-8 points
Marketing Score: 9-12 points

Primary Marketing Focus with Limited Sales
Sales Score: 1-4 points
Marketing Score: 9-12 points

Your profile will help you understand your natural orientation toward sales or marketing approaches to getting customers.

Your Genius Chief Customer Role:

Sales and Marketing Profile Descriptions

These profiles describe common combinations of sales and marketing capabilities. Each profile represents different orientations toward getting customers, with varying levels of focus in sales and marketing approaches.

Choose the one that reflects your score and add it to your Genius CEO Resume. For reference see the EXAMPLE GENIUS CEO Resume.

1. Primary Sales Focus with Limited Marketing
- Excels at personal interaction and relationship-building
- Thrives in face-to-face situations and high-stakes conversations
- Strong ability to read people and adapt communication style
- Confident in handling rejection and maintaining resilience
- However, struggles with systematic approaches to market research
- Finds data analysis and ROI calculations challenging
- Prefers direct conversation to crafting marketing messages
- Less comfortable with digital tools and marketing systems

2. Primary Sales Focus with Moderate Marketing
- Excels at relationship building and complex sales
- Masters high-stakes negotiations
- Superior ability to build trust and influence
- Expert at handling rejection and pressure
- Good grasp of marketing principles
- Can implement marketing strategies effectively
- Comfortable with data analysis
- Manages marketing channels competently

3. Moderate Sales Focus with Limited Marketing
- Comfortable with inbound leads and warm conversations
- Building confidence in outbound situations
- Can maintain relationships once established
- Shows potential in handling objections
- But avoids data-driven decision making

- Limited understanding of market segmentation
- Basic grasp of marketing messaging
- Minimal experience with testing different channels

4. Moderate Focus in Both Sales and Marketing
- Balanced understanding of both approaches
- Can handle both personal and systematic tasks
- Understands basic marketing analytics
- Capable of implementing established strategies
- Manages standard sales situations effectively
- Can work with both data and people
- Neither exceptional nor weak in either area
- Adaptable to different business needs

5. Moderate Marketing Focus with Limited Sales
- Good at understanding market data
- Can craft decent marketing messages
- Manages marketing channels effectively
- Comfortable with numbers and analysis
- But hesitates to engage in direct sales
- Avoids confrontation or rejection
- Struggles with face-to-face selling
- Uncomfortable with high-pressure situations

6. Primary Marketing Focus with Moderate Sales
- Excels at data analysis and market research
- Creates effective marketing strategies
- Masters multiple marketing channels
- Strong understanding of customer segments
- Comfortable with direct sales situations
- Can build and maintain relationships
- Handles standard negotiations effectively
- Adapts to different sales scenarios

7. Primary Marketing Focus with Limited Sales
- Excels at data analysis and market research
- Strong understanding of customer segments
- Creates effective marketing strategies
- Masters multiple marketing channels
- However, avoids personal selling situations
- Uncomfortable with direct negotiation
- Struggles with handling rejection
- Prefers system-driven over relationship-driven approaches