SALES COMPETENCE I HOW TO: Get an individual to complete an assessment

1. Sending instructions by email

Please note this is the first of **two options**. You can also send the instructions to your candidate directly from the FinxS platform. See 2 below to find out how to do this.

To invite your candidate, by email, to complete the Sales Competence Assessment, please copy the template below and send it to them:

Hi there,

Below you'll find the link and access code for you to go online and complete a Sales Competence Assessment.

Please reserve about 30 minutes of uninterrupted time to complete the questionnaire. There are no right or wrong answers so try not to over-analyse your responses.

Remember to answer honestly, thinking about your sales experience and who you actually are, not what you feel others may expect from you.

To complete the questionnaire, please follow the instructions below:

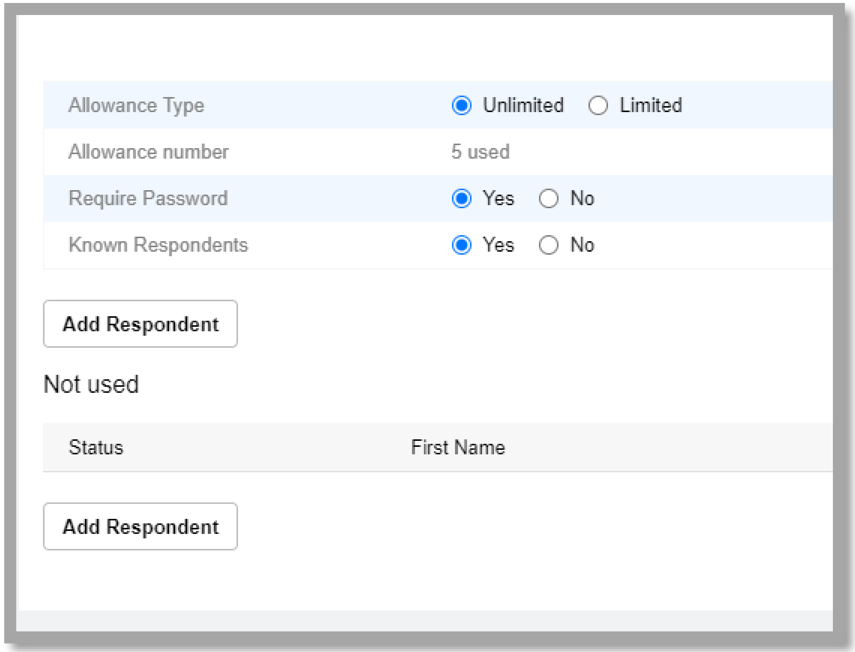
- Go to https://www.finxs.com
- Access Code: **(Enter the access code from your Competence assessment)**
- Choose: "I will do it now"
- Language: "English Australasia" is automatically selected. Please click 'Change Language' in the top right-hand corner if your first language it is not "English Australasia".

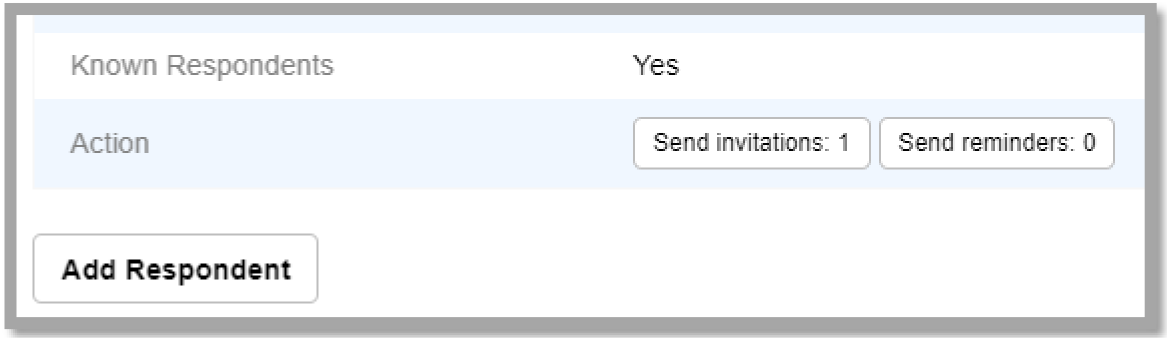
*Please complete the questionnaire only once. Completing the questionnaire multiple times or sharing the access code will result in additional charges.

2. Sending instructions from the FinxS platform

Alternatively, to invite your candidate to complete the questionnaire directly from the FinxS platform, follow the steps below:

- Log into your FinxS account.
- Go to the 'Projects' tab along the top of the screen and select 'Competence Assessment' from the dropdown menu.
- Select the **Project Name/Access Code** on the left hand side
- Click on the "Allowance" tab (see the image above). A new screen will appear. Press EDIT (blue button on the far right of this new screen).
- **Require Password:** Select 'Yes'
- **Known Password:** 'Yes'
- Click on the box containing the words 'Add Respondent'.
- Boxes to enter your candidate's first name, last name and email address will appear. Enter their details.
- You will see that a password is also produced.
- Click SAVE (blue button over on the far right of the screen).
- The word 'Action' will appear beneath the words 'Known Respondents', along with two boxes containing the words 'Send invitations' and 'Send reminders'. If you are ready to send the invitation to your candidate, click the 'Send invitations' box. Or, you may wish to add more respondents first.





- You can choose to 'Send reminders' at an appropriate time in the future, if you wish.
- If you have numerous candidates, rather than adding them in one by one, you may prefer to upload them from a spreadsheet. To do this, instead of clicking 'Add Respondent', you can click on the 'Sample' button on the right to download a spreadsheet to use. The first name, last name and email addresses of your candidates must be entered. (You will first need to click on the 'Enable Editing' button in the top centre of the spreadsheet). 'Save' a copy. NB: it must be saved in the Excel 97-2003 Workbook version. (It will automatically do this and save to your Downloads, if you simply 'Save' it). Then click the 'Upload' button. Your candidates details will appear. If you have a spreadsheet already prepared, you can simply click 'Upload'.