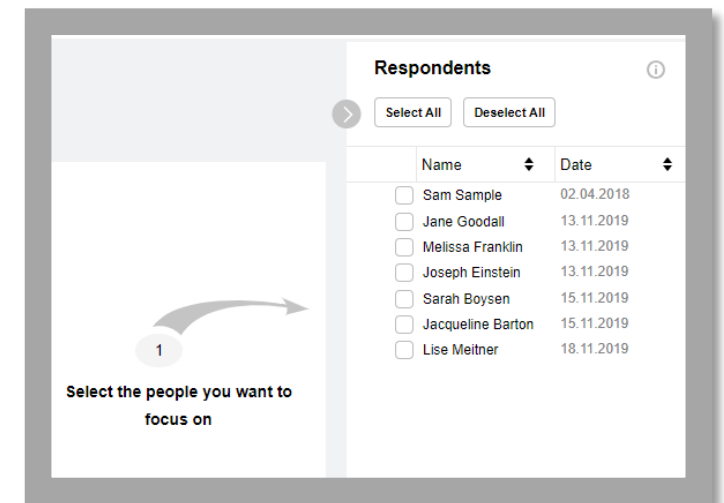


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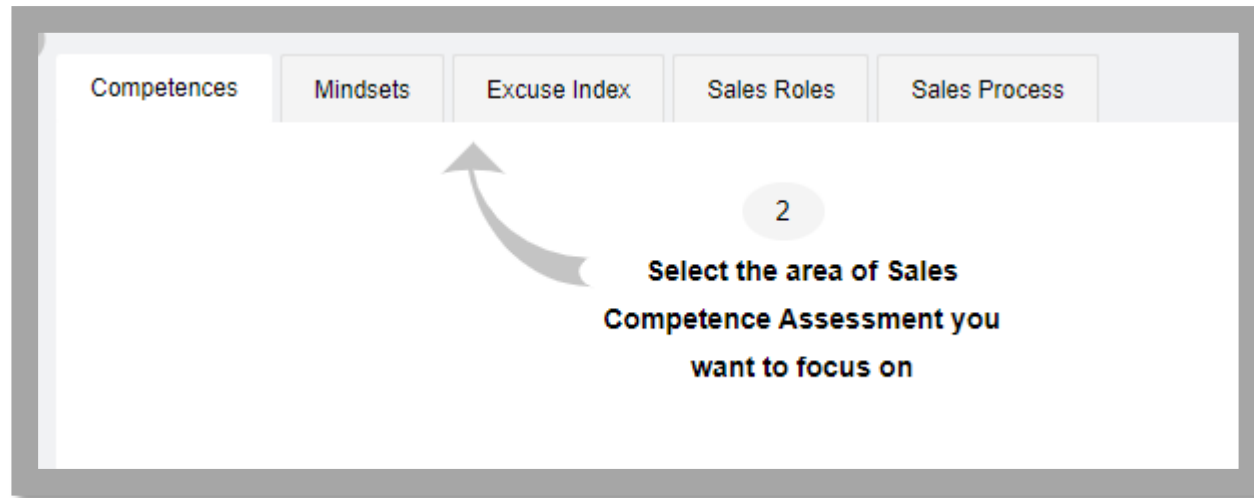
SALES COMPETENCE I HOW TO: Use Open Preview

- Log into your FinxS Account
- Go to the '**Database**' tab on your dashboard and click on '**Individuals**' in the dropdown menu
- Expand "**Competence Assessment**" in the left-hand column by clicking on the small ►
- Click on the name of the **Project/Access Code** you wish to view
- Click on the boxes beside the **names of the people** you would like to view (Multiple people can be viewed at the same time)
- Click the '**Open Preview**' button that has appeared above the list of names
- Follow the instructions on screen, i.e.,

1. Select the people you want to view from the list on the right or 'select all',



2. Select the modules you require:



3. Select the results you want to focus on the left:

Choose mindsets

Select All Deselect All

- ☐ Conquering
- ☐ Hunter
- ☐ Persistence
- ☐ Reading the situation
- ☐ Logic
- ☐ Hunger
- ☐ Empathy
- ☐ Social approval
- ☐ Taking control
- ☐ Next Step
- ☐ Finding the truth
- ☐ Influencing

Choose sales roles

☐ SYSTEM ROLES (0) ⓘ

- ☐ Sales Revealer
- ☐ Sales Creator
- ☐ Sales Forerunner
- ☐ Sales Innovator
- ☐ Sales Dealer
- ☐ Sales Provider
- ☐ Sales Counselor
- ☐ Sales Partner

Choose process stage

Select All Deselect All

PRE SALE STAGES

- ☐ Lead Evaluation
- ☐ Initial Contact
- ☐ Needs Exploration
- ☐ Closing/Negotiation

POST SALE STAGES

- ☐ Initial Engagement
- ☐ Account Management
- ☐ Expansion

Choose competences

Select All Deselect All

- ☐ Prospecting
- ☐ Qualifying
- ☐ Building Rapport
- ☐ Following the Sales Process
- ☐ Goal Orientation
- ☐ Needing Approval
- ☐ Controlling the Sales Process
- ☐ Handling Objections
- ☐ Questioning Effectiveness
- ☐ Active Listening
- ☐ Critical Thinking
- ☐ Initiative
- ☐ Presenting
- ☐ Time Management
- ☐ Dealing with Failure
- ☐ Determined Competitiveness
- ☐ Money Concept
- ☐ Emotional Distance