

# ***Hiring Sales Staff for Growth:*** A Tactical How-To Guide



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# Overview:

This paper addresses the issue of sales hiring faced by payroll service bureau organizations (SBOs) across the industry. At the Apex HCM Align 2018 customer conference, several Roundtable Discussion groups were conducted with over 100 SBOs of various sizes from across the nation. These SBOs identified hiring as their number one issue for two reasons. First, it is difficult to find new hires in a very tight economy. Second, there is uncertainty about the right hiring strategy for a payroll SBO. This paper dives into the hiring practices most used in sales with a focus on providing a tactical “how-to” guide for sales representatives. In addition, this paper includes testimony from current payroll service bureau organizations who discuss their success with expanding their payroll sales teams.

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# Background Data:

The Bureau of Labor Statistics released the 2018 Employment Summary report on January 4, 2019, which stated total employment grew by 2.6 million jobs in 2018 and 2.2 million in 2017. The result of this rapid job growth has been a dramatic reduction in the unemployment rate to 3.9% and a 3.2% increase in average wages during 2018. So, what do these statistics mean to you and your payroll service bureau? First off, economic growth means business growth opportunities lie ahead for payroll businesses in 2019. Now is a great time to plan to grow your payroll service business. To do this though, you'll need to add staff, and specifically salespeople, to help you capture the new business opportunities in the marketplace. This leads to the second point and the purpose of this paper, hiring the sales representatives, you need to help your business expand. Hiring in today's economy can be quite difficult. The next sections outline several industry hiring trends, and a few ways to leverage those trends in your favor when looking for your new sales team additions. Remember, it's an employee market right now, and job seekers possess options and the power of choice. Therefore, you need a strategic and competitive hiring approach to find the right candidates and ensure your business growth.

# Industry Research:

According to the Small Business Association (SBA), the majority of small business failures occur within the first five years of start-up. The reason lies not in products or services, not because of accounting practices or operations issues, but rather in low sales. That seems like a straightforward statement, but further analysis shows that as businesses grow, they require continually higher annual sales to maintain growth above the annual rate of attrition. In addition,

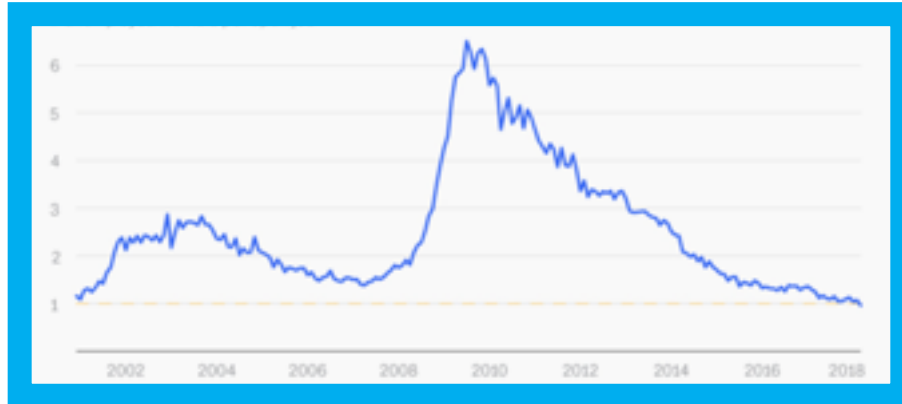
**“The majority of small businesses fail in their first 5 years because of a lack of customer acquisition!”**

**- Small Business Association**

the owner/operator usually leads the sales efforts and as sales volume rises, the owner becomes increasingly distracted by operational and client issues. The result being a glass ceiling; an invisible barrier that prevents the business from continuing its growth rate.

Two strategies will help you avoid this glass ceiling situation. Strategy #1 – Accept no growth. If you determine a comfortable business size and work to maintain that size with no expectations of growth, the glass ceiling becomes a non-issue. This enables staff and the owner, to maintain job roles and operational balance to keep customer satisfaction high and attrition low. However, if you aim to grow your business, a point quickly approaches when you need to implement Strategy #2 – Hire additional staff. The most common first hire is a salesperson.

**There are now more job openings than people who want them!**



So how and where do you begin? The very first step should be understanding the hiring market. This is important to get an idea of how and where to start your search for candidates. Recent reports by ADP found that given the current state of the economy job seekers, not surprisingly, have declined! This means it's time to get strategic with your sales hiring plan. It's an employee's market out there and they hold the power in hiring decisions, not you.

Glassdoor recently asked 1,000 sales professionals about their job search, their priorities in terms of compensation packages and the reasons they would leave their current jobs. The research revealed that 68% of sales professionals plan to look for a new job in the next year; at least 45% plan to look for a new job in the next three months. Only 19% reported no plans to look for a new job.

## Sales Professionals Share Job Search Plans

**68%**

Plan to look  
for a new job  
next year.

**45%**

Plan to look  
for a new job  
in the next 3  
months.

**19%**

Have **no plans**  
to look for  
a new job.

There are a few aspects affecting those numbers, such as salary, career growth, company culture, relationships with their manager(s) and co-workers and senior leadership. For the last 10 years post-financial crisis, companies had the upper hand in the hiring process. There was an abundance of people looking for jobs and corporations leveraged it to their advantage. Companies used the large supply of candidates to demand a high threshold of requirements. But with an improved economy the job market has shifted. But, in the sales field the bright spot remains that salespeople always keep an eye open for a better sales opportunity. The data shows that 81% of currently employed salespeople can be lured away with the right offer.

# Step #1: Start with a Hiring Plan

So, you're ready to make a sales hire? Perfect. But in order to avoid tremendous wasted time, effort, and cost, you will need to start with a hiring plan. Robert Digby, CEO for Apex HCM advises the following, "Always start with a targeted plan. Have what you're looking for outlined – a detailed sales job profile, and job description that creates parameters around compensation and quotas." He continues, "Defining this is key. To waste less time finding a candidate that could fit your needs, have your needs profile up-front, which allows you to narrow down a set of candidates that will fit what you're looking for."





To get the most accurate hiring profile, sales hiring expert Lee Salz suggests conducting a Sales Needs Analysis to help develop the most accurate job profile. Sit down with your business partners, and discuss the needs and responsibilities of this sales role. Also discuss the personality and character traits you will seek in the ideal candidate. Salz recommends:

**“The first step is to develop a profile of your ideal candidate and prioritize the attributes between required or desired. This detailed, written description presents a comprehensive picture of the successful candidate for the role and serves as the basis for the entire sales talent screening program. Interviews, mock roleplays, and assessments should compare the candidate to this profile. The needs analysis strategy should be geared toward identifying synergies, or lack thereof, between the candidate and the opportunity.”**

Spending this time upfront will help you paint a better picture of the salesperson you seek.

Also, put yourself in the candidate's shoes while building your sales profile – “What skills and knowledge were helpful to me, or would have been, had I known them coming into the job?” Is having payroll industry domain knowledge key? What about having relevant payroll industry certifications, i.e. FCP, CPP, etc.? Should they come from targeted sources; e.g. ADP, PayChex, or other local payroll companies or PEOs? These are all important factors that contribute to building the most comprehensive sales profile. Remember, it's a tight job market out there! So know how your business will differentiate itself from everyone else looking to snag the next sales superstar. Having your website up to date, a crisp understanding of your onboarding and training processes, a competitive salary plus comp plan and an all-inclusive sales profile will lead you well on the way to finding the best candidate for your sales team.

## Step #2: Follow a Hiring Strategy

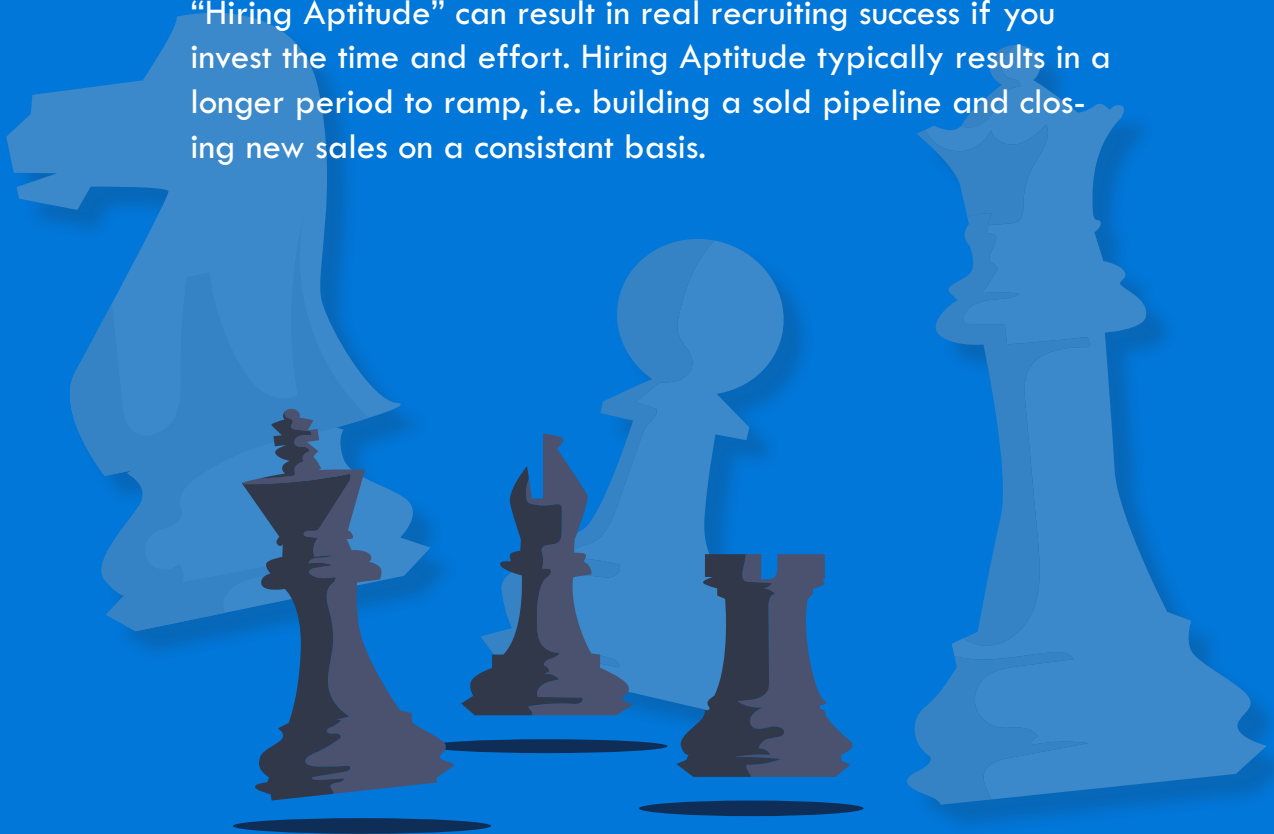
Hiring strategy falls into three categories: hire experience, hire aptitude, or hire attitude. All three of the strategies work if you find the right candidate and you provide the right training resources for him or her to reach sales success.

### **“Hire Experience”**

If your hiring plan and profile result in a detailed description of a candidate possessing years of industry knowledge, well developed skills and prior roles with your competitors, then you are following the “higher experience” strategy. Hiring for experience is the most common path pursued and does present a level of risk even though the entire strategy is designed to minimize risk. Many companies pursue hire experience as a means for the salesperson to “hit the ground running” and also avoid the need to provide elementary and time-consuming training. But, in order to find a truly experienced person who fits the hiring profile, the company will need to offer top dollar. Lesser compensation typically results in candidates with some experience, or candidates that have not produced real sales success. Truly successful and experienced salespeople demand top dollar. If you are not willing or able to pay top dollar then you should avoid the “Hire Experience” strategy. Be honest with yourself to avoid a frustrating hire path using the wrong strategy.

### **“Hire Aptitude”**

If your hiring plan and profile results in the realization that you simply cannot afford a top producing and seasoned salesperson, a potential route for you is to hire a younger and less experienced candidate with high aptitude. This may be a salesperson from another industry who understands how to sell and possesses the aptitude to learn and succeed. For example, a person currently in a customer facing, i.e. selling role, for a different type of service. This strategy enables you to find candidates at a lower compensation level either because they possess less experience, or they currently work in a lower paying industry. Be aware that the risks related to “Hire Aptitude” are your ability to spot that diamond in the rough and your ability to provide the necessary training and resources. “Hiring Aptitude” can result in real recruiting success if you invest the time and effort. Hiring Aptitude typically results in a longer period to ramp, i.e. building a sold pipeline and closing new sales on a consistent basis.



### **“Hire Attitude”**

If your hiring plan and profile result in a mandatory set of characteristics rather than experience and skills, you should pursue a “Hire Attitude” strategy. Many companies discover the keys to hiring success are a set of personality traits that can be found in any industry and in any type of job. “Hire Attitude” mostly focuses on sales or customer service people in industries outside of the hiring industry but the basic sales or service skills and experience already exist. “Hire Attitude” extends the risk more as the new hire may not possess any sales experience but rather possesses those personality traits that correlate to success. “Hire Attitude” requires the most investment in time and training to create a productive salesperson. On the upside, the savings in compensation can be large and finding candidates is often easier without the requirement of either sales or industry experience.

# Step #3: Sourcing Candidates

Three basic approaches exist to finding new hire candidates: paid recruiters, internal network, and online job website services. All three options work if used in the proper situation, but each of these possess different pros and cons. The right approach largely relates to the hiring strategy you use as described in the prior section.

**#1 Paid Recruiter** “Hire Experience”  
If you have chosen to pursue the “Hire Experience” strategy you are searching for a needle in a haystack. Your hiring profile calls for specific industry experience, specific companies, specific skills and proven past success. This task is best left to professionals that focus on your industry and focus on hiring salespeople.

One of the most practical ways of hiring a new sales team member is hiring a third-party recruiter to assist in your search. Using a third-party search firm allows you to focus on the daily business, with minimal interruption to your schedule, while still finding that new sales hire. Hiring can be expensive!



Some of that expense is in training and lost productivity, certainly. But a good portion of the cost is in the recruitment process itself including how much time you will spend in the administrative tasks of the job opening, advertising, hours spent screening, interviewing, re-interviewing, background checking, and more. As the business owner, you frequently take these steps only to have to start the process all over again. And that's just the tip of the iceberg from the cost of hiring aspect. Even more for small organizations, the employees' and business owner's time is stretched too thin; if you don't have a dedicated recruiter, you're pulling precious work time away from other tasks, tasks that may affect your bottom line. A recruitment agency to get the right candidates (not just a pool of applicants) may be the way to go when you want to get the most bang for your buck. This could be ideal for those with no sales team or a larger, more established team, as you can direct the recruiter how best to hire for your specific needs.

This professional assistance can be expensive. Typically, around 20% of the new employee's annual salary. Is \$10K-\$20K+ worth the cost? Time saved and a much higher success rate are the simple reasons. Also, using a paid recruiter gives you piece of mind. Recruiters offer guarantee periods. If the hire doesn't work out, you don't pay and they start the search over, not you. Using a recruitment agency can be helpful from an accounting standpoint. Agency fees are a legitimate business expense that can offset a portion of that cost. They'll track your competitors and the marketplace for people in similar positions to see if anyone is interested in looking. Recruiters have the time to identify and reach out to passive candidates in a way that's probably just not possible for you or someone in your office. Recruitment agencies can turn a month-long search into one that lasts just a few days. Knowing when and how to use them effectively can not only reduce the stress of recruiting, it can help you guarantee a long-term hire.



## **#2 Internal Recruiting**

The more typical ways of finding good salespeople revolve around word-of-mouth recommendations. Tom Hopkins, world-renowned as 'the builder of sales champions' offers this advice: "Tell everyone you know that you're seeking a salesperson! Tell your clients. If they're fans of your product, one of them might even be interested in coming on board. Tell your suppliers. The people who call on your business are in sales and know many others. There could be someone good they know of who's just burned out on the product line they currently represent and who needs a change. This is an especially wise method for finding good help because your suppliers won't recommend a dud. Their reputation with you would be ruined and they might lose your business. Tell your banker! When your business succeeds, so does theirs."



Implementing an office referral program is a good way to find your next sales hire. Great people usually make a habit of surrounding themselves with other highly capable professionals. While many employees are probably already sharing open roles with qualified contacts in their networks, a well-developed employee referral program can boost this behavior even more. By incentivizing referrals with bonuses and contests, you can drum up excitement and further motivate your workforce to bring the best talent they know into your organization!

According to Glassdoor's sales professionals survey, reaching out to salespeople through social media is the most effective sales recruitment strategy. In fact, 49% cited it as the top way to reach them, with the next closest (hosted meet-ups) cited by only 10%. Sourcing through social media sites like LinkedIn, Twitter and Facebook can result in many candidate leads. Salespeople are also likely to respond well to cold-calling, since it's a part of their job. Once you've found their contact details, you should send them an email or give them a call.

**“Reaching out to salespeople through social media is the most effective sales recruitment strategy.”**

**- Glassdoor**



### **#3 Online Job Websites**

Writing an attention-grabbing and thorough job description is crucial to engaging with qualified candidates. Once you have a detailed description written, posting it to free and paid third party application sites is a must. And although you can find great candidates in popular job boards like Indeed and Monster, you could also try job boards that specialize in sales talent. More targeted job ads through job boards like SalesHeads.com and SalesGravy.com can help make your job openings visible to the right applicants.



# Interview Format, Questions & Tasks

Hopkins, suggests several keys to interviewing salespeople, “The biggest mistake most employers make in hiring interviews is to talk about the business too much. When you're talking, you're covering a topic you already know. What you want to do is ask a lot of questions and get the candidate talking so you can find out if you can work with this person, if they have good experience, if they're reliable, and if they can express themselves well.”

Of all positions to hire, executives often find hiring salespeople the most difficult. One reason why is most salespeople interview very well. Any reasonably successful salesperson should be articulate, personable and persuasive. Hence, they all interview well. To find the rainmaker, the needle in the haystack, it is best to use some tried and true interview questions, tasks, and techniques to find the real performers. The sales interview guide gives exact interview questions to ask, assignments to give potential candidates, and other tactics you can use to identify great salespeople.

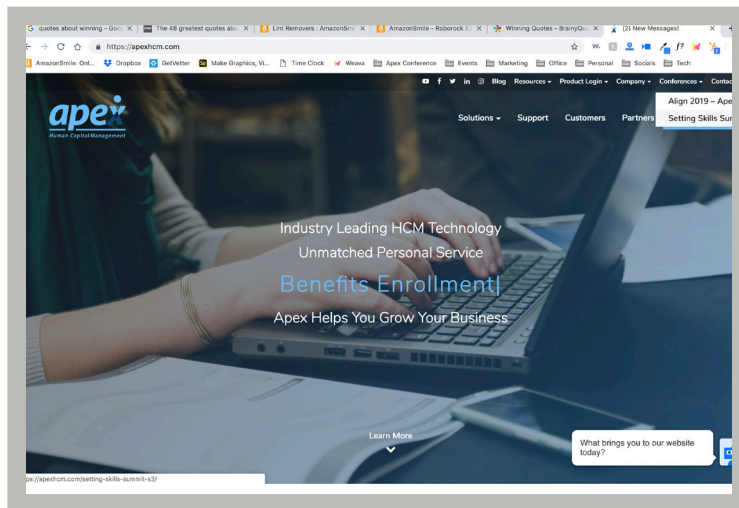


# Training & Retaining Your Salespeople

It's not just hiring a good salesperson, you also must provide them a solid environment to thrive. Once you've selected a new hire, onboarding and learning the ropes are the next steps for your new sales team member. Large companies usually create established well-tested procedures for bringing new salespeople up to speed. But smaller businesses often "are on-boarding salespeople all wrong," according to Joanne Black, author of the bestseller *No More Cold Calling*. "They inundate the new-hires with product details, playbooks, and then let them go at it," she explains. To avoid this mistake, small businesses should "educate new hires on the company's ideal target customer, what their issues are, what it's like to be in that person's shoes, and what they want to hear from a salesperson," says Black. "They need to learn and practice how to have a business conversation with their ideal prospects."

In a business model like the payroll services industry Robert Digby, Apex CEO adds, "You don't want to run into the glass ceiling effect – as you grow your client base you need to constantly outgrow your client attrition. Year over year growth is essential for every business! Make sure your sales team understands the importance of maintaining new client acquisition ahead of client attrition. This helps in the motivation and authentic conversations they have with prospects and current clients."

Giving your new sales hire all the right tools is a must! Share insight on current customers that helped you build your first referral pool. Help them build your referral ecosystem from accountants, CPAs, insurance brokers, banks, credit unions, current customers and leads you've reached out to in the past. Introduce your new sales hire to your network. This gives them the best place to start when first stepping into their new role. Also, introduce your new hire to the marketing tools and campaigns you use or have used to stimulate demand. Not using any? Follow the link to the Apex HCM resources tab [HERE](#) to gain access to white papers like this one, Customer Success Stories, blog posts, and other information you can repurpose for your customers and prospects. Give the new salesperson access to your prospect lists and back-end sales tools like salesforce.com from the get-go. Be sure they are well-versed on a solid "sales cadence" methodology to call and market prospects. And lastly, measure your ROI! If there is no return, stop investing and try a different strategy. Be firm in sticking to their quotas and monthly sales expectations – if the sales rep does not perform, cut your losses quickly.



So, your new sales hire hit the ground running due to your successful onboarding program. But, how do you continue training your sales team to be successful? The answer lies largely in outside resources. Leverage your network and Apex HCM can help! For Apex customers, we partner as more than just a software company, we help clients improve their sales and marketing. Apex has developed a library of online marketing content geared to help our payroll service bureau clients continually educate and grow their sales teams knowledge. Here are just a few examples of Apex programs geared to helping our clients grow their sales skills and knowledge:

- ✕ Attend Apex Selling Skills Summit: S3 conference
- ✕ Attend Apex Align annual users conference
- ✕ Participate in Apex HCM product of the month webinars
- ✕ Attend a new employee training session with your Apex Support Team
- ✕ Network with other Apex sales leaders and AILC members
- ✕ American Payroll Association – get FPC & CPP certified
- ✕ Attend IPPA / TPG conferences

# Case Studies: Payroll Service Bureaus

The following case studies document several successful payroll service bureaus and their experience and advice about hiring new employees, especially salespeople.

**Jennifer Scotese, President, Express Data System, Pottstown Pennsylvania:**

Jennifer, and Express Data Systems, possess nearly 30 year's experience in the payroll industry. Jennifer certainly understands the payroll business and the people needed to run a successful payroll business. When it came to hiring a new salesperson, Jennifer knew exactly the profile she needed and the proven experience she wanted. As discussed earlier in this paper, Jennifer pursued a "Hire Experience" strategy and used a paid recruiter to find exactly the right candidate.



“ My whole rationale changed after I read this sales book by Daniel Pink, called Drive. It made me totally rethink how I saw a salesperson – that they were a true asset to me and my company. You see we don't cold call, we don't knock on doors and we don't litter ourselves all over the market; we let them come to us. I use my networking skills and seek referrals from current clients and people who know what my business is all about. I have a deep local connection to my customers, and I wanted a salesperson that understands that. I even used that underlying personal connection to find my salesperson! Seeking out one of our customers who was a recruitment agency – don't forget about your opportunities to partner – they found us a great hire. Someone who had the experience we were looking for, that I didn't have to take time to groom. That didn't come cheap, but you get what you pay for. And I wanted quick, experienced, and the skills to jump right in with the sales style that worked for my business. Having a sales addition has been great! ”

**Andrea Lanier, Director of Payroll Operations, CPP, CFO Network, Little Rock Arkansas:**

CFO Network was founded in 2004 and provides their business clients a full range of payroll and accounting services. Andrea acknowledges the “glass ceiling effect” that Robert Digby described earlier in this paper. Andrea recounts that as CFO network grew, her ability to manage existing clients, acquire new clients, and simultaneously proactively manage the business had become unsustainable. Hence, Andrea pursued hiring salespeople which has become a tremendous success. Andrea loves her sales team and the attention she can now refocus onto other important areas of the business:

“ CFO Network currently has two salespeople and it’s been great! They mostly use internal means for lead-gen, and work our current client base to expand the client’s services with CFO Network. Having a team solely dedicated to sales really allows me as a business owner to focus on the day-to-day. I get to step back and take a better focus on other aspects of my business. I think it’s key to remember that when you’re in the growth phase – you can’t do everything yourself! So make sure you support yourself, and your business with the kind of talent that can really help you maintain success, and even grow it! ”



**CFO NETWORK**



**Jake Arnold, Vice President of Operations, Genesis PPG, Clarence New York:**

Genesis PPG began as a provider of payroll and payment processing for western New York and has grown into a nationwide provider. The success of Genesis's expansion lies largely in their ability to hire great staff for customer service and sales. Jake has driven that staff expansion and uses the "Hire Attitude" strategy to find employees with the right personality and characteristics to succeed at Genesis and deliver for Genesis customers. It is the less common hiring approach, "Hire Experience" being most common, but hiring for attitude and culture has been a key to success for Genesis:

“

I try to focus on my four C's when hiring: Character, Competence, Capacity and Culture. A candidate of high character is one whose career and personal experiences illustrate a sense of responsibility, honesty and discipline. A level of ownership and sincere character to provide exemplary service to customers and teammates is exactly what I want from a candidate. Also, competence to do the job well is important. Unfortunately, companies far too often hire on competence alone, simply choosing someone who has successfully worked in a similar job. It's a short-sighted approach that can prove a liability in the long-term. That skill should be in conjunction to their capacity to do the job and do it well! Lastly is culture – this is a big one. No amount of competence can outweigh employee behavior that proves disruptive to the rest of the team. That's why it's critical for us that a candidate proves a good fit with a company's culture before making the cut. Focusing on the four Cs of hiring has helped Genesis PPG to grow, expand services and successfully compete. It undoubtedly will benefit your company as well.

”





# Conclusion:

Steph Curry, the two-time NBA MVP and three-time NBA champion said, “You learn there’s no right way or wrong way. It’s just what you feel comfortable with and trusting yourself. Don’t let anyone box you into a certain style.” Curry’s words hold true for basketball, but also for your approach to hiring staff and salespeople to grow your payroll service business.

This paper documents three distinctly different hiring strategies, as well as three different avenues for locating new hires. All of these approaches can work. The trick is assessing which approach best fits you, your company, and the market conditions.

Expanding your staff for operational reasons is typically a simple business decision based on existing revenue, existing workload and existing resources. But hiring a salesperson requires a bit of a crystal ball as you must look to the future. You must face unknowns such as, “Will your client attrition rate soon outpace new customer acquisition? Or “Do I still have the time to spend selling new customers while still managing a growing staff? Your honest answers to these questions will determine if you need to hire sales help.

Just as several payroll operators noted during interviews for this paper, just adding a single sales team member significantly cuts down on the time owners spend out of the office managing leads, prospect visits, and implementation meetings. You’ve spent years networking and growing your business so it may be time to hand off some of those tasks to a dedicated sales representative. The majority of small businesses fail in their first five years because of a lack of customer acquisition! Lean on your partners at Apex HCM to help guide you in your sales hire and continue to grow your payroll sales knowledge.



**If hiring salespeople will be a task for you in 2019, download Apex HCM's "Guide to Interviewing Salespeople." This tactical, how-to manual includes specific questions and tasks you should use during the sales hiring process to improve your odds of finding your next rainmaker.**

## About Us:

Apex HCM provides a state-of-the-art software platform allowing our clients to take full advantage of the benefits of cloud computing technology. We help organizations escape the bindings of traditional software, including the hidden costs of protracted implementations, disaster recovery, data security, software upgrades, and everyday IT needs.

Apex HCM is a market leader in licensing cloud-based payroll, benefits and HR technology. Over 300 payroll service firms nationally use Apex's technology as the core of their business foundation. Our highly customizable and comprehensive suite of products and services include payroll & tax, time & attendance, benefits enrollment, ACA, human resources, mobile apps, reports & analytics, employee onboarding, applicant tracking, and other business management tools normally reserved for large enterprises. Apex HCM's cutting edge cloud-based software allows its customers to effectively compete feature-for-feature with larger established firms while dramatically improving their workforce productivity. For more information, please visit [www.apexhcm.com](http://www.apexhcm.com) or call 877-750-APEX (2739).



# ***Appendix:*** Interview Guide



## Apex HCM

### Hiring Process Overview

Success in hiring requires process, preparation, and time-tested specific actions. The following guide presents a process with specific questions and tasks for you to use in evaluating sales applicants for hire. The method presented below draws from the experience of sales managers from Apex HCM and other payroll companies with a combined total of over 50 years of experience in hiring salespeople.

For best results, use this guide in conjunction with the Apex HCM whitepaper *Hiring Sales Staff for Growth: A Tactical How-To Guide* which can be found, free of charge, at [info.apexhcm.com/hiringwhitepaper](http://info.apexhcm.com/hiringwhitepaper).

STAGES	REQUIREMENTS / DETAILS
1. Job description	Honest and detailed description of your key search criteria and expectations of the role.
2. Hold preliminary interview	A 30-minute phone screening of candidate.
3. Complete email sample	Assign candidates a simple email composition task to sample their writing skills.
4. Hold secondary interviews (1 of 2)	Candidates successful in stage 2 & 3 progress to stage 4, in-person interviews.
5. Hold secondary interviews (2 of 2)	Ideally same day as stage 4 but with other staff members, peers, etc.
6. Presentation webinar	Assign candidate to present as “role play” three-slide presentation to prospective customers.
7. Reference calls	Call candidate’s references and conduct referral interview
8. Share findings and make decision	Share findings amongst your colleagues, your boss, and other stakeholders in the organization group to arrive at a Hire or No Hire decision. Capturing scores on each candidate (see below) will help you reach consensus easier than everyone relying on their personal feelings and recollections.
9. Inform candidate and close	Prepare the offer letter and relevant sell materials for candidate. Remember, good salespeople are always in demand. In a strong economy, your candidate may be evaluating multiple offers. You may need to marshal internal resources to “sell” the candidate on your offer.

## Job Description

The quality of the candidate at the end of the process directly relates to the time, effort and quality invested into the beginning of the process. As presented in the Apex HCM whitepaper, *Hiring Sales Staff for Growth*, you should first decide on the hiring strategy you intend to pursue. If you decide to use the “Hire Experience” strategy, for example, your job description should outline specific skills, industry experience, and types of companies from prior careers. On the other hand, if you decide to pursue a “Hire Attitude” strategy, your job description should contain key behaviors and personality traits you seek.

Share the job description with others in your organization to capture their ideas and reality-check your thoughts. Common problems encountered with creating job description is either being unrealistically specific and searching for a unicorn or being too broad without enough specifics to interest the right candidates.

## Preliminary Interview

This 30 minute phone interview is designed to screen candidates and select viable prospects to enter the hiring process. The hiring manager, who may be a senior executive, does not need to personally conduct the preliminary interview.

### Questions for Candidate (Preliminary Interview)

- Tell me a little bit about yourself?
- Tell me about your most recent sales role:
  - What were you selling?
  - What was the average ticket price?
  - How long was the sales cycle?
  - Were you selling new logos or managing existing accounts?
  - What was your performance versus quota for the last 4 or 5 years?
  - Who did you report to?
- How would you describe your current sales team?
- What is your current CRM and what other sales tools have you used?
- Tell me about a challenging situation in your current role and how you resolved it.
- Why did you apply for a job at Apex HCM? What would you hope to get out of your next job?
- Could you explain the gaps in your employment (if any)?
- What is your earning expectation?
- Availability to start?
- What questions do you have for me?

The preliminary interview is designed to be a quick run-through of the relevant areas of the job. Detail around each question is not required since the follow-up interview will dig into the detail. The preliminary interview scores the candidate for rejection or continued evaluation. The following “Score Sheet” uses a simple 1-4 scoring methodology to rate each candidate on an objective basis. This also enables you to utilize multiple interviewers and be able to compare their feedback equally. The score relates to the candidate’s fit to the job description.

Scoring Dimensions	Notes	Score (1 lo, 4 hi)
Background - detailed quota performance, ticket price, sales cycle, new logo/upsell, etc.		
Resume – quality of the writing, presentation, and data presented.		
Communication – articulate, persuasive, personable and easy to talk to.		
Fit – cultural fit with your company, style and worth ethic		
Other / intangible		
OVERALL		

## Email Writing Sample

The email writing sample determines ability, curiosity and resourcefulness, in constructing an effective argument. Given our sales environment shift from less live phone conversations to more email communication, your salespersons’ writing skills are critical to their success.

### Email Writing Sample Task for Candidate

<CANDIDATE NAME>

Written communication skills are very important to a successful business development manager. To evaluate your abilities, we would like you to compose a brief – no longer than one page – email to a prospective client.

Imagine you are in a sales process with a payroll business owner at a mid-sized payroll company. You just completed a product demo and want to send a follow-up email. Your email should reinforce the reasons the company should become an our client and advance the sales process.

You may use any publicly available information to complete the email. Please complete the task by <DATE>

Thank you,

Scoring Dimensions	Notes	Score (1 lo, 4 hi)
Writing ability – clear, concise and professional		
Curiosity and resourcefulness – corporate relevant and interesting information		
Ability to construct an effective argument – would prospect want to talk again?		
Other / intangible		
OVERALL		

## Secondary Interviews (part 1)

If an HR representative, or other staff member, conducted the Preliminary Interview, this Secondary Interview, part 1, will be the first time the hiring manager meets the candidate. Entering this interview, the hiring manager will possess a Preliminary Interview score, email writing sample, and the candidate's resume all of which should be reviewed prior to the meeting. Make sure to once again review the Job Description to keep critical components of the job in mind for the conversation.



### Questions for Candidate

- Tell me about your background; start with where you grew up through school and through career positions.
- How did you originally get into sales?
- What motivates you?
- For the last few roles:
  - What was your role?
  - What are you most proud of in that role?
  - What would you say was your biggest opportunity for development?
  - What would your manager say about you?
  - What was your quota, and how did you perform versus quota?
- What questions do you have for me?

Scoring Dimensions	Notes	Score (1 lo, 4 hi)
Resume		
Sales skill and ability		
Resilience and coachability		
Fit to Job Description		
Prior success and motivation		
Other / intangible		
OVERALL		

## Secondary Interview (part 2)

The Secondary Interview digs deeper into the candidate's sales process, sales skills and specifics about their past performance. The secondary interview can be conducted at a later date or combined with part 1 if sufficient time and other interviewers are available. It's always ideal to have multiple people interview the candidate as different facts and observations will be revealed to different people.

### Questions for Candidate

- Can you describe your current role for me?
- Tell me about your target market and target customer?
- How do you keep up to date on your target market?
- Can you describe your sales process?
- What is your approach to handling customer objections?
- Have you ever had a losing streak? How did you handle it?
- What made you originally get into sales?
- What is your least favorite part of the sales process?
- What are your goals for the next role you take?
- What were your goals – quota-wise – in your prior role? How did you perform versus those goals?
- How much do you know about our company? What's something we could do differently?
- What questions do you have for me?

Scoring Dimensions	Notes	Score (1 lo, 4 hi)
Resume		
Sales skill and ability		
Resilience and coachability		
Fit to Job Description		
Prior success and motivation		
Other / intangible		
OVERALL		

## Presentation Webinar

Writing skills are an entry level requirement for Sales. Next, and arguable much more important, are presentation skills. This task aims to determine the candidate's ability to present business material, handle questions, handle objections, and construct an effective argument.

### Presentation Task for Candidate

<CANDIDATE NAME>

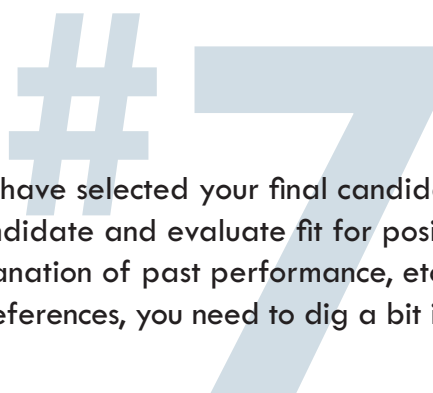
Perhaps even more important than written communications skills are presentation skills. To evaluate your presentation abilities, please assemble a three-page slide presentation for a 30-minute introductory call with us.

Your potential client is a payroll business owner at a mid-sized payroll service business. The candidate completed an online lead generation form and requested an introductory call. Guide the candidate through the presentation, and please leave at least 10 minutes for questions.

You may use any publicly available information about our company, our competitors and the industry to construct the presentation. Let us know a few day/times that work for you. We will setup the webinar and send you an invite. You may use whatever presentation tools you choose (documents, PowerPoint, spreadsheets, etc.)

Thank you,

Scoring Dimensions	Notes	Score (1 lo, 4 hi)
Resume		
Sales skill and ability		
Resilience and coachability		
Fit to Job Description		
Prior success and motivation		
Other / intangible		
OVERALL		



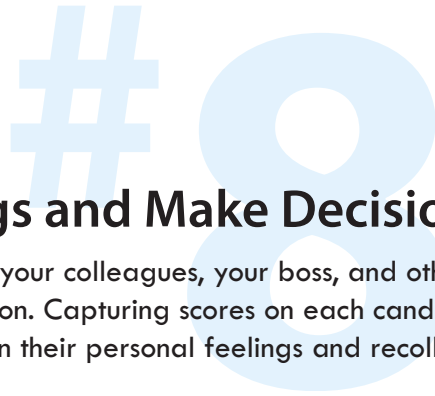
## Reference Calls

This is a very important step in the process once you have selected your final candidate or short list of final candidates. Validate prior performance of candidate and evaluate fit for position. Probe for any inconsistencies between the candidate's stories, explanation of past performance, etc. Remember, the candidate will only provide positive and supportive references, you need to dig a bit in your questioning.

### Questions to Ask Reference

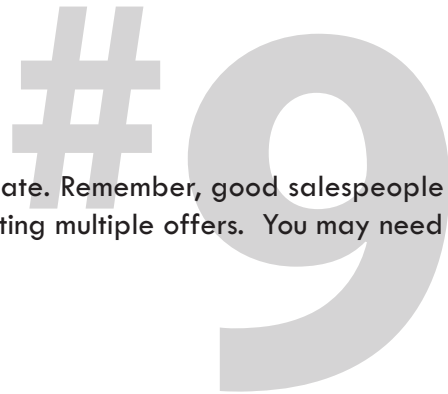
- Can you describe when <NAME> worked for you and in what capacity?
- What were <NAME>'s biggest strengths?
- What were <NAME>'s biggest areas for improvement?
- How did <NAME> perform versus quota, with specific numbers if you can remember?
- How many other reps in similar roles were there, and how did they all perform?
- Where would you rank <NAME> relative to the other reps?
- Would you rehire this rep?
- Is there anything else I didn't ask that I should know?

Scoring Dimensions	Notes	Score (1 lo, 4 hi)
Background		n/a
Strengths and weaknesses		
Performance		
Intangibles / Other		
OVERALL		



## Share Findings and Make Decision

Share findings amongst your colleagues, your boss, and other stakeholders in the organization group to arrive at a Hire or No Hire decision. Capturing scores on each candidate (see below) will help you reach consensus easier than everyone relying on their personal feelings and recollections.



## Inform Candidate and Close

Prepare the offer letter and relevant sell materials for candidate. Remember, good salespeople are always in demand. In a strong economy, your candidate may be evaluating multiple offers. You may need to marshal internal resources to “sell” the candidate on your offer.

Hiring a salesperson will definitely position your service bureau for growth. Another strategy is implementing state of the art technology and Human Capital Management services. If you would like to view a demo of the Apex HCM system, please contact us [info@apexhcm.com](mailto:info@apexhcm.com).