

# Leveraging competency frameworks for sales efficiency

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In today's competitive business landscape, a competent sales team can be the difference between hitting targets and falling short. But what does it mean to be "competent" in sales? How do you measure and develop the skills needed for your team to excel?

Enter the sales competency framework – a structured approach that helps define, measure, and cultivate the skills necessary for sales success.

“An effective sales manager must have a tool belt so they that they can choose the right approach to unlock and inspire the individuals in their teams to step outside of their comfort zones, evolve their behaviors, and form new and productive habits,”

says Managing Consultant Jonny Adams of SBR Consulting.

“If all we have is a hammer, then everything starts to look like a nail.”

Abraham Maslow.

## What is a sales competency framework?

Simply put, a sales competency framework outlines the essential skills, behaviors, and knowledge required for sales professionals to succeed in their roles. It serves as a roadmap for identifying what skills are necessary for different sales positions, providing a clear path for growth, training, and development. It also gives sales managers an important tool to move towards the ever-elusive [power of a predictable pipeline](#).

Competencies within a sales framework might fall into several categories, depending on your organisation's needs. Here are just a few to consider:

**Knowledge competencies** – this includes factors like product knowledge, industry expertise, understanding of competitors, and overall market awareness.

**Skill competencies** – this include things like communication, problem-solving skills, relationship-building, customer service skills, and/or active listening.

**Technical competencies** – this might include proficiency in your organisation’s preferred CRM tools, the ability to analyse data, provide an accurate personal forecast, and an understanding of sales technologies that increase the capacity to earn more sales.

**Behavioral competencies** – not to be overlooked, these might include things like overall resilience or adaptability, emotional intelligence, teamwork, and motivation. After all, inflexible or EQ-deficient sales team members usually don’t go very far in sales.

## Why are competency frameworks important?

“Sales cycles are lengthening for more organisations and deal slippage [is] a real concern when it comes to the ability to forecast accurately,”

says Uhubs Co-Founder Matt Milligan. According to recent research by Pavilion



**Sales cycles are lengthening:**

16% longer on avg. and 44% of Q1 deals slipped.



**Productivity challenges:**

69% of reps missed quota in Q1.



**Process adoption issues:**

top performers are 588% more likely to follow methodology effectively.



**Gap between high performers and the rest widening:**

8.9x delta between top performers and their peers.

*Source: Pavilion 2024*

## Clarity and direction

Taking the time to develop a well-defined competency framework is important for several reasons. First, it provides clarity and direction for your team. A good competency framework establishes a clear understanding of the skills and behaviors required for each sales role. Sales reps know *exactly* what’s expected of them, and managers have a structured, unbiased metric for assessing individual performance, especially when big sales gaps may exist between desired performers and underperformers.

“Competency framework is a great way to track progress over time and start to quantify the progress of your initiatives.”

Matt Milligan, Uhubs.

## Identifying opportunities for improvement

Second, competencies helps identify potential skill gaps. Where is an individual *now*, and where do they need to be? This enables targeted training and development, ensuring resources like 1:1 coaching or role-playing are personalised and directed where they’re most needed.

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In other words,

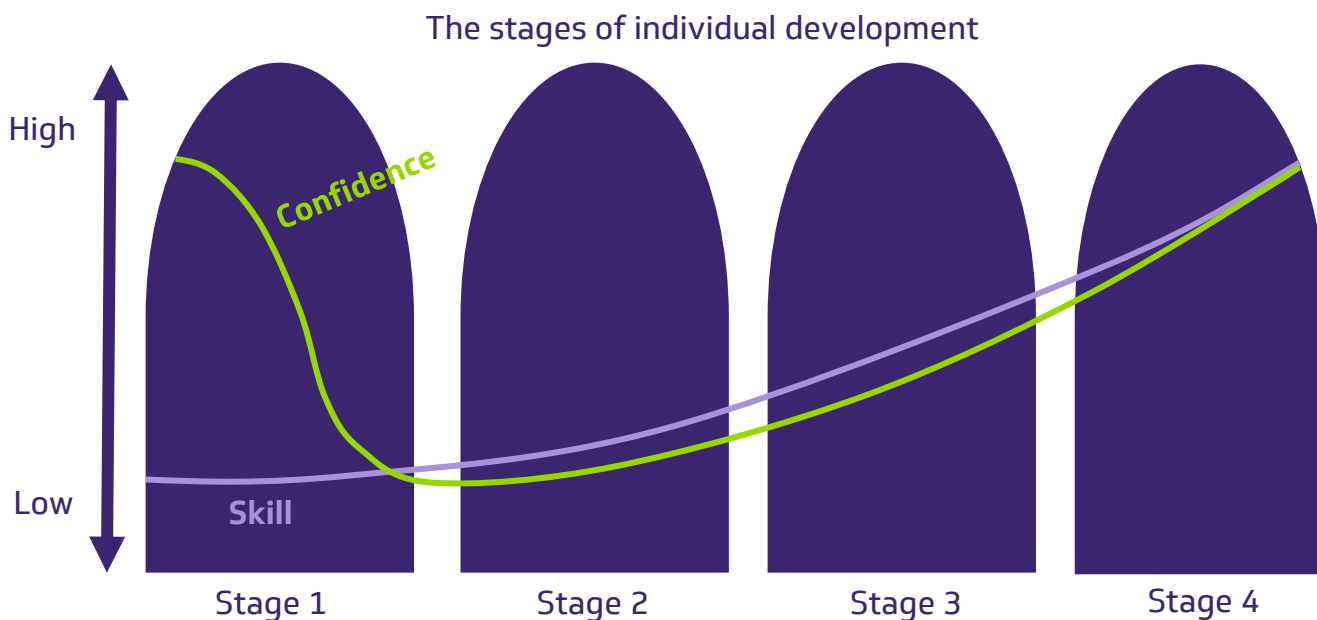
“Help me understand, what are the things I need to do, the areas I need to develop in order to become more effective and ultimately hit my sales target?”

says Matt Milligan of Uhubs.

“If you only had a small amount of time, how would you maximise that with individuals?”

Jonny adds.

When it comes to professional development, confidence and skillset are both at the lowest points on the scale shortly after a new hire’s onboarding or training, Jonny points out. With initial confidence worn off but skillset still developing, this is a point in which many sales managers lose team members to frustration, he says.



Confidence frameworks “help us get toward the mastery skillset much quicker and reduce any risk of those individuals falling out,” Jonny says.

“If we're able to pinpoint the specific skills that are enabling people to ramp and improve, then as leaders, we're able to use situational leadership, which enables us to select a specific style, whether that is educate, coach, challenge or entrust, and then really move that competency forward throughout the stages.”

Jonny Adams, SBR Consulting

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## Consistency and performance evaluation

Competency frameworks enable consistency. With a standardised competency model, sales teams operate with consistent language and expectations. Competency frameworks also provide measurable criteria for evaluating performance. Managers can track progress much easier, provide constructive feedback, and develop personalised development plans to help each sales team member reach their full potential.

“It means giving you much more assurance that you’ve got a team that is capable of getting you to the [sales] number,”

Matt said.

Finally, a good competency framework can also act as a soft guideline for hiring. By understanding the qualities required for success, hiring managers can more easily identify candidates who are a good fit, or who have the potential to be a good team fit with a little training.

## How do you set up a sales competency framework?

Setting up an effective sales competency framework involves several elements.

Jonny says he implements a few strategic steps:

- Agree on the customer journey, including the definition of customer-facing roles and objectives
- Identify the core competencies
- Develop competency mastery levels (Level 1-4) for each role
- Identify metrics and reporting for each competency
- Brief sales leadership, Human Resources and customer success teams on the framework.

### 1. Define the roles and responsibilities

Start by identifying all the sales roles within your organisation – from sales development representatives (SDRs) to account executives, sales managers, and beyond. Each role will have distinct responsibilities and require different competencies. Clearly define these roles, focusing on the tasks they perform and the goals they’re expected to achieve.

### 2. Identify core competencies

Next, you want to determine the skills, knowledge, and behaviors essential for each role. Engage with sales leaders, managers, and top-performing reps to gain insights into what competencies are crucial for success. Consider the following:

What knowledge is necessary to understand the products, services, and industry?

What behaviors contribute to building lasting relationships with customers?

What skills differentiate top performers from average ones? Is there a certain number of output required?

How would an ideal sales member manage their pipeline flow in order to close deals?

Then, you want to categorise your competencies. Organise them into different categories (knowledge, skills, behavioral, and technical) to create a comprehensive and balanced framework. For example, an SDR might need strong communication and research skills, while a sales manager might need leadership, pipeline analysis, communication, and strategic thinking.

### 3. Set proficiency levels within the competencies

As Jonny mentions, the next step is to establish different proficiency levels (e.g., beginner, intermediate, advanced, expert) for each competency. This allows you to assess where each sales rep stands currently and provides a roadmap for their development. For example, a beginner might be learning the basics of negotiation, while an expert would be able to lead, high-stakes negotiations with confidence.

### 4. Develop assessment and evaluation metrics

Then, you want to create tools and methods for assessing various competencies. This could include self-assessments, manager evaluations, 360-degree feedback, role-playing exercises, or using sales metrics (e.g., win rates, deal size) to gauge proficiency. Regular assessments help track progress and identify areas for improvement.

### 5. Integrate the framework into sales processes

Finally, embed the competency framework into your sales processes, such as recruitment, training, performance evaluations, and career development. Ensure that all sales reps and managers are familiar with the framework and understand how it applies to their respective roles. Not to be overlooked, involve internal partners like Human Resources in the adoption of your competencies, to get them on board and let them be a part of the change management process, Jonny says.

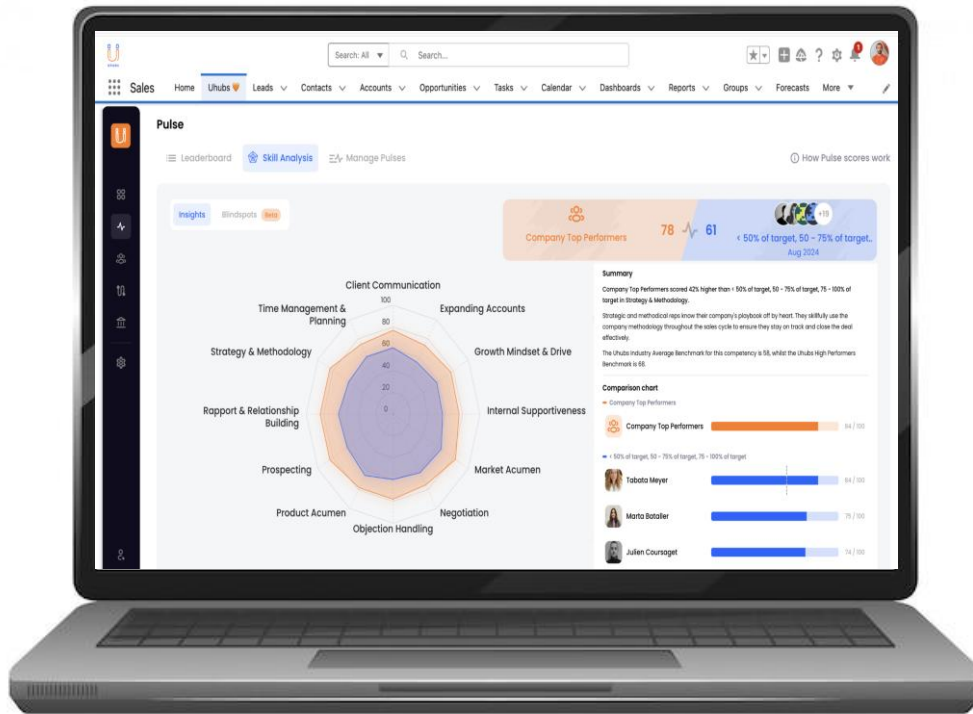
## Measuring the impact of competency frameworks

Once your framework is established, tracking progress and maintaining visibility is key for ensuring its effectiveness. [Utilise your CRM to track performance metrics](#) aligned with your competency goals. For example, you might examine how negotiation or closing skills impact deal close rates or how product knowledge affects upselling opportunities.

“You’ve engaged leadership, you’ve brought them on the journey,” Matt says. “The next challenge is then how do you ‘industrialise’ that competency framework [across your organisation]. How do you place it at the heart of your workflow?”

That’s where tools like Uhubs can help, Matt says. “We’ve been importing those competency frameworks into Uhubs, which sits then natively into the CRM and we’re really starting to see some transformation.”

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“If you don't have a competency framework. Just start, just get the ball rolling, build one, go start using it. It's an immense thing to add to your toolkit. And give it to your leadership team, see what they can do with it,” Jonny says.

Listen to Jonny Adams of SBR Consulting and Matt Milligan of Uhubs discuss more on competency frameworks in this [free webinar](#).

## Making a competency framework work for you

The sales landscape is constantly evolving, so it's important to review and update your competency framework regularly. What worked three or four years ago may not be what's needed to achieve the same results today. Be mindful of any adjustments that need to be made to keep the sales funnel at peak productivity.

In short, a sales competency framework is more than just a list of skills – it's a strategic tool that provides, clarity, direction, and opportunities for growth. It also helps build a culture of continuous improvement and excellence. When implemented and tracked effectively, a sales competency framework can be the catalyst that propels your sales team to new heights, ensuring they consistently hit targets and drive business success.

To discover more about initiating competency frameworks at your organisation, [let's talk growth](#).