



## Competencies Checklist for Hotel Sales Leaders

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This checklist can be used by sales leaders, general managers, HR professionals, and others to assess the skills and knowledge required to perform the role of **Sales Leader**, and the key behaviors and abilities that contribute to strong performance in the role.

These competencies are the “how” that accompanies the “what” someone delivers in the role, and can be used as a guide to raise the bar for performance and promote a culture of ongoing development and learning.

Rate how proficient the individual is when it comes to each competency:

**4 – Advanced:** Has broad and deep understanding and skills, with substantial experience in this area; can apply the competency regularly and independently and display this competency in complex, varied situations; role model for this competency.

**3 – Proficient:** Has sufficient understanding and experience to operate at a full professional level in moderately complex situations; can generalize basic principles to effectively function in both predictable and new situations.

**2 – Developing:** Newly developing in this area; has a general understanding of key principles but limited or no applied experience with this competency; is capable of using this competency with coaching and support, in simple situations.

**1 – Opportunity for Development:** Does not demonstrate this competency at the expected level, even with available assistance or direction from others.

**NA – Not Applicable:** This competency is not a requirement for this position in this organization.

**WAYS TO USE THIS TOOL:** Use this tool as part of your regular review process, as an interview tool, with managers to see if they can/want to be directors, and/or as an auditing tool to teach directors across your portfolio. Customize it as needed for your property of company by adding your own additional brand- or company-specific requirements.

For HSMAI's Hotel Sales MANAGER Competencies Checklist, see [www.hsmmai.org](http://www.hsmmai.org).

	Self Rating (1-4)	Manager Rating (1-4)	Development Recommendations	Recommended Resources
<b>SALES COMPETENCIES</b>				
Clear understanding of hotel's positioning against the comp set				<a href="#">Evolving Dynamics: From Revenue Management to Revenue Strategy</a> : Chapter 5 – Understanding the Market  HSMAI Academy Course: <a href="#">Competitive Value Analysis</a>  HSMAI Academy Course: <a href="#">Understanding the Accommodation Market</a>
Ability to develop and execute comp set SWOT analysis				<a href="#">Evolving Dynamics: From Revenue Management to Revenue Strategy</a> : Chapter 5 – Understanding the Market  HSMAI Academy Course: <a href="#">Understanding the Accommodation Market</a>  HSMAI Academy Course & Template: <a href="#">How to Develop Your Hotel SWOT Analysis</a>
Understanding of the key metrics of revenue management				HSMAI Academy Course: <a href="#">Understanding the Accommodation Market</a> (for proficiency)  HSMAI Academy Course: <a href="#">Introduction to Hospitality Revenue Management</a> (for proficiency)  <a href="#">Hotel Revenue Optimization Essentials</a> instructor-led course (intermediate)  <a href="#">Certified Revenue Management Executive (CRME)</a> certification (advanced)
General understanding of cost analysis, GOP, NOI, P&L, and EBITA				<a href="#">Certified in Hospitality Business Acumen (CHBA) e-Course</a>

	<b>Self Rating (1-4)</b>	<b>Manager Rating (1-4)</b>	<b>Development Recommendations</b>	<b>Recommended Resources</b>
Comprehensive understanding of how to identify and mine key markets and targets				HSMAI Academy Course & Template: <a href="#">Market Segmentation</a>
Expertise in account plan development				
Effective utilization of available technologies for sales prospecting and development				
Knowledge of industry-related events and tradeshows, and their relevance to the hotel				<a href="#">Events Industry Council</a>
Strong interpersonal relationship skills (e.g., managing sensitive situations, building mutual trust, recognizing diversity and differences, etc.)				
Ability to network with confidence to form and maintain business relationships				
Develop sales and marketing best practices, strategies, and account management process that will maximize revenues, increase market share, and drive customer retention and satisfaction.				
Collaborate with internal, cross-functional teams (e.g., GSO, Hotel Sales, Operations, and Marketing) to provide optimal results for both the customer and the hotels.				

	Self Rating (1-4)	Manager Rating (1-4)	Development Recommendations	Recommended Resources
<b>SALES COMPETENCIES</b>				
Understanding of the sales tools and resources needed by team members, and the ability to procure them for their use				
Proficiency in time management				
Proficiency in project management				
Proficiency in forecasting and budgeting				<a href="#">Evolving Dynamics: From Revenue Management to Revenue Strategy: Chapter 7 – Forecasting</a> HSMIAI Academy Course: <a href="#">Forecasting Rooms</a>
Demonstrable understanding of the different roles and responsibilities of sales leaders and sales managers				HSMIAI Academy Course: <a href="#">Recruiting &amp; Retaining Hospitality Salespeople</a>
Expertise in the design and execution of business plans				
Proficiency in ecommerce				<a href="#">Hospitality Digital Marketing Essentials: A Field Guide for Navigating Today's Digital Landscape</a> <a href="#">Hotel Digital Marketing Essentials</a> instructor-led course <a href="#">Certified Hospitality Digital Marketer (CHDM)</a> certification
Able to interpret STAR reports and apply STR information to decisions and strategies				HSMIAI Academy Course: <a href="#">Understanding the Accommodation Market</a> <a href="#">STR CHIA Certification</a>

	Self Rating (1-4)	Manager Rating (1-4)	Development Recommendations	Recommended Resources
<b>LEADERSHIP SKILLS</b>				
Strategic/big-picture thinking				
Critical thinking for innovation and problem solving				
Willingness to embrace change				
Ability to train team members on sales skills and interpersonal relationship skills				
Ability to coach team members on their sales and career goals (in the field and in the office)				
Ability to train and support team members on the technologies/software they are expected to use				
Ability to create and manage performance modification plans addressing HR issues with members of one's team				HSMAI Academy Course: <a href="#">Recruiting &amp; Retaining Hospitality Salespeople</a>
Accountability – Determines objectives, sets priorities, delegates, and holds self and others accountable for results.				HSMAI Academy Course: <a href="#">Managing the Hotel Sales Function</a>
Ability to communicate effectively with high-level executives/owners				
Ability to recruit, train, and develop a strong and cohesive team				HSMAI Academy Course: <a href="#">Recruiting &amp; Retaining Hospitality Salespeople</a>
Models the Company's culture, vision, mission and core values at all times				

	Self Rating (1-4)	Manager Rating (1-4)	Development Recommendations	Recommended Resources
<b>PERSONAL ATTRIBUTES &amp; BUSINESS SKILLS</b>				
Business Acumen – Demonstrated understanding of 1) how ALL the operations and functions of the hotel/company work together to create success, and 2) what metrics reflect how each function contributes to the overall enterprise				<a href="#">Certified in Hospitality Business Acumen (CHBA) e-Course</a> <a href="#">Sales Acumen Glossary</a>
Written and verbal communication skills				
Online communication skills <ul style="list-style-type: none"> <li>• Understands how to use online video call technology (e.g., Zoom, Microsoft Teams, WeChat, WhatsApp, Google Hangout, etc.) to communicate with buyers</li> <li>• Makes genuine connections with people using these technologies</li> </ul>				
Professional personal brand/image				
Motivated, team oriented, self-starter				
History of successful sales leadership				
Understanding of human resources policies and benefits, and employees' legal rights				
Actively engaged in their professional community (e.g., via HSMIAI)				<a href="#">HSMIAI Global Regions</a> <a href="#">HSMIAI Americas Chapters</a> <a href="#">Events Industry Council</a>