

Chally Assessment™

How to Use the
Competency Development Toolkit

Competency Development Toolkit

Chally Assessment™

Competency Development Toolkit

Indirect Sales Benchmark



Indirect Sales Benchmark

Competency Development Toolkit | 2

Benchmark Profile Description

The Indirect Sales role is responsible for supporting a network of distributors, agents, value added resellers, or manufacturer's representatives. They have little direct authority over these sales forces except in rare cases where they are under contract to sell only their products or services. As a result, they are tasked with training and motivating distribution partners through joint calls, promotions, and/or special bonuses.

Predictive Competencies

- Ensures Coverage and Responds to Customers
- Expands Business Through Cross Selling
- Prepares and Delivers Effective Presentations
- Closes Through Personal Identification with the Product
- Engages Others in Learning and Assesses Understanding
- Coaches Others and Provides Timely Feedback
- Leverages Expertise to be Recognized as Subject Matter Expert

© 2020 Chally Assessment, LLC. All rights reserved.

Indirect Sales Benchmark

Competency Development Toolkit | 3

Ensures Coverage and Responds to Customers

Organizes time to cover ongoing priorities and will make arrangements to cover whenever absence is unavoidable; understands that rewards are commensurate with effort and invests the time to get the job done; uses time efficiently during regularly scheduled hours so that extra hours are not inevitable, but is responsive to additional requirements or demands when necessary

LOW SCORES	HIGH SCORES
<ul style="list-style-type: none">• Believes personal time is off-limits and may resist interrupting leisure activities to deal with work demands• Loses control of their action list and can become overwhelmed by ongoing priorities• May not feel a need to put forth more effort, but will accept delays instead• Allows outside distractions, commitments or time demands to consistently take priority and prevent an efficient use of time and resources• Fails to put into place systems or resources to cover account needs if they are unprepared or unavailable, creating delays in response time	<ul style="list-style-type: none">• Available after hours to respond to the needs of both internal and external customers• Organized and efficient in how time is spent during the day so that the need to work unscheduled hours is the exception rather than the rule• Resists the distraction of nonwork-related issues that can interfere with the coverage of ongoing priorities• Accepts that a strong sense of duty to those who are counting on them cannot always be met during regular working hours• Prepares a back-up system to cover unpredictable or unpreventable overloads in any absence

Mindset Tips:

- Commit to organizing your time so that the number of extra hours you need to work are reduced.
- Remember that since your workload will vary, there will be times when working extra hours will be unavoidable.
- Understand that continually making optimum use of your work hours will reduce the amount of personal time lost to workload demands.
- Realize the importance of having a back-up plan – you will not always be available after hours and must have a system in place to handle issues in your stead.

Success Tactics:

- Maintain a To Do list to keep track of tasks and prevent you from feeling overwhelmed.
- Pair up with a colleague who effectively organizes his workload – take note of techniques you can use in your own schedule.
- Check libraries and bookstores for reading material that deals with the subjects of organization and time management.
- Devise a system by which you can monitor internal and external customers and anticipate potential issues before they become problems that require your personal time.
- Analyze your work process and evaluate where you may be wasting time - modify your work habits so that you maximize work hours and minimize after-hour demands.
- Identify those who are responsible for handling issues in your absence – ensure that they know they are to be held accountable.
- Compose a public file for each internal and external customer so that others can come up to speed should you be unavailable.
- Prepare someone to take over when you are unavailable – fill that person in on all details pertinent to each customer.
- Create a list of people in your department who would be able to answer particular questions and solve customer problems when you are unavailable.
- Even though you may be available after hours, there will be times when multiple problems arise – make certain that you prepare someone to assist you.
- Take time to train someone on how to approach customer issues, so you can be certain that they will handle problems effectively.

© 2020 Chally Assessment, LLC. All rights reserved.

Coaching and Development Report

October 26, 2020

Assessment Results

Name

Jane Smith

Profile/Index

New Business Development Benchmark

Summary

The table below indicates this individual's natural aptitude for the competencies that are critical for success in this type of role. Here are some guidelines for how to interpret results:

- Clear Strength: This individual possesses the highest potential to successfully demonstrate the competency. Associated behaviors will be natural, and the individual should excel in this area.
- Emerging Strength: This individual possesses the potential to successfully demonstrate the competency. It is likely that they can achieve (or have achieved) excellence in this area with deliberate learning and practice.
- Area for Development: This individual may have the potential to successfully demonstrate the competency. However, in order to develop, they will likely need focused training and must be willing to accept coaching.
- Not Natural Strength: This individual does not possess the natural tendency to demonstrate the competency. This does not mean the person cannot perform or is not performing. More likely, ongoing support and coaching will be required along with "work arounds" in order to maximize effectiveness.

Critical Competencies

Networks Effectively	Emerging Strength
Analyzes and Resolves Customer Problems	Clear Strength
Uses Standard Discovery Questions to Qualify Prospects	Not a Natural Strength
Commits Extra Effort to Ensure Success	Emerging Strength
Closes Through Incremental Steps	Clear Strength
Seizes New Opportunities	Emerging Strength

Validity Score

The validity scales within the assessment indicate that this individual was open and candid in answering the questionnaire.

Chally Assessment™

Coaching and Development Report
Jane Smith

Prepared for:
Chally Assessment, LLC

Chally

© Chally Assessment, LLCJane Smith 2

In-depth results for New Business Development Benchmark

COMPETENCY 1/5

Networks Effectively

Takes a proactive approach to business/social interactions; will expand contacts consistently; is comfortable meeting new people and stimulating the conversation

Not a Natural Strength

Area for Development

Emerging Strength

Clear Strength

Score Interpretation

This individual is typically comfortable moving between people or groups both familiar and unfamiliar as this is an opportunity for potential business dealings in the future. For the most part, they have little difficulty expanding a contact list because they enjoy meeting new people and they will greet these people in an enthusiastic and friendly manner.

COMPETENCY 2/5

Analyzes and Resolves Customer Problems

Objectively analyzes a problem situation and takes steps to provide a solution; identifies the root of the problem before pressing for a resolution; remains engaged until a solution is reached; tries to see all sides of the problem and thus understand others' assessment of the issue or response; takes personal responsibility for identifying a resolution

Not a Natural Strength

Area for Development

Emerging Strength

Clear Strength

Score Interpretation

This individual remains focused on solving the main problem and will not simply provide temporary solutions or quick fixes. They are eager to determine the true nature of the issue and interested in understanding others' perspectives and determining a root cause. Once they have isolated and defined the problem, they take ownership of it. Even if they draw on the expertise of others to help solve the issue, they will remain involved until a satisfactory resolution is reached.

Key Motivational Characteristics

The motivational characteristics described below measure this individual's preferences, wants, or desires. However, this DOES NOT necessarily indicate that they currently have developed the habits or skills to satisfy these preferences. A manager may wish to note these specific motivational needs and utilize the suggested discussion points to commence a meaningful dialogue about potential with this person. These characteristics will also provide you with an indication of this individual's fit to your organization's culture.

Motivational Characteristics

Manager's Tips

They enjoy coming up with new processes and take pride in developing unique solutions. They would prefer a fresh approach with an eye toward substantial long-term results as opposed to refining a well-tested system already in place. They will become restless and tempted to redesign processes rather than work to make incremental improvements.

This person is highly self-satisfied and not distracted by the need for approval of others. They are confident in their ability to complete tasks and may not objectively evaluate how their actions could impact results because they truly don't expect to be the cause, even indirectly, of any potential downsides. As a result, they could dismiss constructive criticism.

This individual does not appear to be bothered by stressful situations. They are able to function effectively, even under large amounts of pressure, because they're able to maintain perspective. This attitude helps them to achieve goals, but it could also give the impression that they don't care enough about the situation to be worried.

This individual will offer assistance to others and strives to present themselves as a professional resource. A good deal of their satisfaction comes from sharing expertise and experience with those who are less knowledgeable, so they tend to give advice to everyone, whether it is requested or not. If forced to limit the amount of help they give, they could lose motivation and find the job less satisfying.

Encourage them to consider how much time has been allowed to deal with unexpected barriers to new plans. They may prefer to spend time on breakthrough solutions, but these innovations could be blocked by unforeseen obstacles that could render the new system less efficient than the old. Be sure there are back-up plans in place and that the advantages of taking a new route versus modifying existing processes have been weighed. If nothing can be gained, encourage them to save their creative energy for more valuable projects.

Make it clear to them that in order to ensure that goals are attained, it is critical for everyone to perform regular self-analysis. Although they may not believe that their behavior could jeopardize results, they need to realize that even the strongest employees have behavior patterns that could impact goal accomplishment. Get them into the habit of taking an objective look at their actions and the possible ramifications if they do not make needed adjustments.

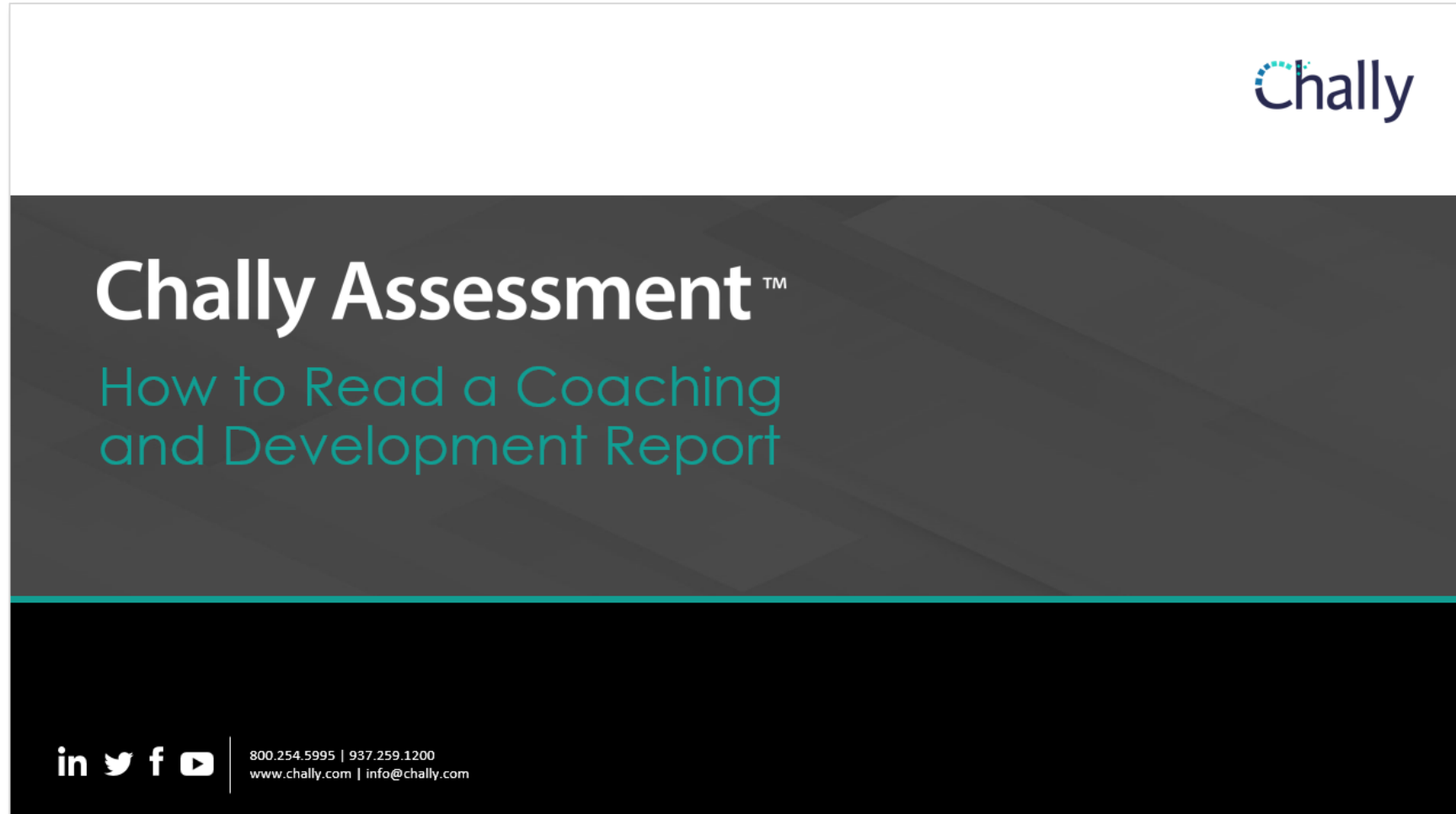
When stressful circumstances arise, be sure that they address the worries of others, but also explain that not everyone reacts to pressure in the same manner. They should convey that they understand and even share others' concerns, but believe that by keeping the goal achievement in focus, the crisis will soon pass and original objectives will still be met.

Since their professional image is important to them and they enjoy educating people, they need a work environment that provides opportunities to share knowledge. However, they must learn the limits of offering help or sharing knowledge. Be sure they are aware of their responsibilities and know when to draw the line on sharing expertise. Encourage them to limit the unsolicited advice and focus on teaching those who truly need and desire help.

© 2022 Chally Assessment, LLC. All rights reserved.

3

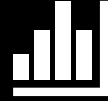
Suggested Tutorial



About the Chally Assessment



The Chally Assessment is a self-report instrument, not a feedback instrument



Results provide benchmark and comparison data on what it takes to be successful in a specific role



Results indicate natural tendencies, inherent motivations, and likelihood of certain behaviors (in other words, the survey measures capacity, not performance)



Results may provide insight into potential blind spots that may be inhibiting effectiveness



Results may identify hidden strengths or capabilities that can be further leveraged and shared

The Skill Equation



Assessment Results

Name

Jane Smith

Profile/Index

New Business Development
Benchmark

Summary

The table below indicates this individual's natural aptitude for the competencies that are critical for success in this type of role. Here are some guidelines for how to interpret results:

- **Clear Strength:** This individual possesses the highest potential to successfully demonstrate the competency. Associated behaviors will be natural, and the individual should excel in this area.
- **Emerging Strength:** This individual possesses the potential to successfully demonstrate the competency. It is likely that they can achieve (or have achieved) excellence in this area with deliberate learning and practice.
- **Area for Development:** This individual may have the potential to successfully demonstrate the competency. However, in order to develop, they will likely need focused training and must be willing to accept coaching.
- **Not Natural Strength:** This individual does not possess the natural tendency to demonstrate the competency. This does not mean the person cannot perform or is not performing. More likely, ongoing support and coaching will be required along with "work arounds" in order to maximize effectiveness.

Critical Competencies

Networks Effectively	Emerging Strength
Analyzes and Resolves Customer Problems	Clear Strength
Uses Standard Discovery Questions to Qualify Prospects	Not a Natural Strength
Commits Extra Effort to Ensure Success	Emerging Strength
Closes Through Incremental Steps	Clear Strength
Seizes New Opportunities	Emerging Strength

Validity Score

The validity scales within the assessment indicate that this individual was open and candid in answering the questionnaire.

Networks Effectively

Takes a proactive approach to business/social interactions; will expand contacts consistently; is comfortable meeting new people and stimulating the conversation

LOW SCORES

- Tends to hold back in social situations until others demonstrate interest
- More at ease interacting with established and familiar acquaintances while scoping out opportunities to develop new contacts from a comfortable distance
- Prefers the role of observer in social interactions
- May not be comfortable making social small talk without first rehearsing or scripting what will be said

HIGH SCORES

- Prefers to take the lead in social interactions and is quite comfortable 'working a room' when meeting people and putting them at ease
- Moves easily between people or groups both familiar and unfamiliar while noting opportunities for potential business dealings in the future
- Enjoys socialization, sharing information and asking questions about others to 'break the ice' and initiate a conversation

Mindset Tips:

- Make sure to use social networking tools to do some research on potential targets before any event where new contacts can be found; being able to position yourself as someone worth getting to know is a huge advantage.
- Make a point to introduce yourself to everyone at a social function rather than waiting to be approached; since you never know who others know, your original contact may not pan out, but perhaps a friend or colleague will.
- Arm yourself with anecdotes/questions that will make interactions less stressful and put new contacts at ease.

Success Tactics:

- Create a general statement about yourself, your organization, and the products/services you provide. Having something prepared ahead of time will help make it easier to start conversations in networking functions.
- Formulate a list of questions and have them handy so you can initiate conversations without doing all the talking.
- Prepare some statements that will help break the ice, and then rehearse them so they sound natural.
- Ask known groups of contacts to introduce you to people you don't know; since it might be stressful for you to proactively approach people you don't know, pair up with someone who is naturally more outgoing who can start the ball rolling.
- Challenge yourself to move among all the groups of contacts in a room, not just the ones you know; make sure to get contact information from new people and follow up afterward.
- Ask a more outgoing and connected colleague to invite several potential targets out for a meal; networking over lunch can be far less intimidating than a formal meeting or event.
- Join a local club, attend a church or charity function, or volunteer in the community - these are prime networking opportunities in a less threatening environment; commit to expanding your contact base by a specified amount during each event.
- Try to find a few sure fire conversation starters and then remember to listen; people are incredibly interesting sometimes, and you'll no doubt find someone who shares common interests with you if you listen carefully.
- Work with colleagues who are more outgoing. Watch their techniques and body language and then attempt to change just one behavior of yours; small modifications may be all you need to improve your networking skills.
- Ask a colleague to role play as a new contact so you can create an arsenal of ice-breaking anecdotes/ questions.
- Try to spend a specific amount of time with each person in the room so that you do not limit yourself to known contacts; try approaching someone else who appears shy or uncomfortable with the networking process because you may find enough commonality to make a positive contact.

Assessment Results

Name

Jane Smith

Profile/Index

New Business Development
Benchmark

Summary

The table below indicates this individual's natural aptitude for the competencies that are critical for success in this type of role. Here are some guidelines for how to interpret results:

- **Clear Strength:** This individual possesses the highest potential to successfully demonstrate the competency. Associated behaviors will be natural, and the individual should excel in this area.
- **Emerging Strength:** This individual possesses the potential to successfully demonstrate the competency. It is likely that they can achieve (or have achieved) excellence in this area with deliberate learning and practice.
- **Area for Development:** This individual may have the potential to successfully demonstrate the competency. However, in order to develop, they will likely need focused training and must be willing to accept coaching.
- **Not Natural Strength:** This individual does not possess the natural tendency to demonstrate the competency. This does not mean the person cannot perform or is not performing. More likely, ongoing support and coaching will be required along with "work arounds" in order to maximize effectiveness.

Critical Competencies

Networks Effectively	Emerging Strength
Analyzes and Resolves Customer Problems	Clear Strength
Uses Standard Discovery Questions to Qualify Prospects	Not a Natural Strength
Commits Extra Effort to Ensure Success	Emerging Strength
Closes Through Incremental Steps	Clear Strength
Seizes New Opportunities	Emerging Strength

Validity Score

The validity scales within the assessment indicate that this individual was open and candid in answering the questionnaire.

Uses Standard Discovery Questions to Qualify Prospects

Uses a formula or series of questions to determine the prospect's fit with the product; expects to sell to the majority of prospects since they are known to need the seller's products; reacts quickly and objectively to the answers to standard questioning by disqualifying the prospect or proceeding through the selling process

LOW SCORES

- Uses interest in a prospect's needs or problems or compatibility with contacts as the criteria for spending time with them in the selling process
- Finds it difficult to narrow focus to the quality as opposed to the quantity of the business available
- Exhibits too much optimism and not enough pragmatism to cut loose potential business that would not be profitably serviced
- Finds it difficult to be objective in assessing the potential of demanding or challenging contacts

HIGH SCORES

- Asks tough questions around profitability, capacity, and readiness to buy when evaluating a prospect for potential business opportunities
- Uses a formula approach to qualifying prospects that addresses typical interest points, such as price and ability to deliver
- Does not allow time to be consumed by prospects who should be disengaged or deferred based on the quality of business they will provide
- Remains emotionally detached from the prospect's situation, staying objective in assessing the potential for profitable business

Mindset Tips:

- Remain objective when qualifying prospects – do not go into the meeting with erroneous assumptions.
- Understand that not all sales are equal – realize that costs may be incurred for your company if the prospect does not properly fit with the product or your organization's needs.
- Do not become distracted by prospects who should be disengaged – if prospects are ready to buy and have profit potential, it will be obvious.
- Remain emotionally detached from the prospect's situation – do not allow your personal preferences to cause you to waste time with a prospect who will not yield gain for the company.
- Commit to taking care of those customers who will take care of you.
- Realize that the more time you spend with prospects who are not a good match for the company, the less time you have to spend with those prospects who will improve the bottom-line.
- Remember that only 10 percent of prospects are actually ready to make a purchase at a given time – it is up to you to sift through leads to locate that 10 percent.
- Learn that all customers do not deserve equal amounts of attention – in order to improve your sales results, you need to cut loose those prospects who do not match your products or needs.

Success Tactics:

- Engage in role-playing with a colleague in order to refine your ability to uncover a customer's potential to commit to making a purchase.
- Establish criteria by which you can determine the customer's true needs and whether your offering can fulfill them while making a profit for your organization.
- Get feedback from existing customers in order to determine what factors influence their purchase decision – use this information to devise a system by which to qualify prospects.
- Create a list of thorough, yet inoffensive, questions that will rate a prospect's potential as a customer.
- Develop a scoring system for prospects in which they are rated by profitability, capacity and readiness to buy.
- Work with a successful salesperson and take note of how they qualify leads – utilize their questions and techniques in your own routine.
- Get pointers from colleagues and superiors on how to walk away from a cold deal.

Individual Development Planning



- What strengths are you going to maximize or leverage?
- What gaps are you going to focus on addressing?
- What skills will you build or enhance?
- What resources or support do you need to make these desired changes?
- How will you tap into your motivations to succeed?

Key Motivational Characteristics

Key Motivational Characteristics

The motivational characteristics described below measure this individual's preferences, wants, or desires. However, this DOES NOT necessarily indicate that they currently have developed the habits or skills to satisfy these preferences. A manager may wish to note these specific motivational needs and utilize the suggested discussion points to commence a meaningful dialogue about potential with this person. These characteristics will also provide you with an indication of this individual's fit to your organization's culture.

Motivational Characteristics

Manager's Tips

They enjoy coming up with new processes and take pride in developing unique solutions. They would prefer a fresh approach with an eye toward substantial long-term results as opposed to refining a well-tested system already in place. They will become restless and tempted to redesign processes rather than work to make incremental improvements.

Encourage them to consider how much time has been allowed to deal with unexpected barriers to new plans. They may prefer to spend time on breakthrough solutions, but these innovations could be blocked by unforeseen obstacles that could render the new system less efficient than the old. Be sure there are back-up plans in place and that the advantages of taking a new route versus modifying existing processes have been weighed. If nothing can be gained, encourage them to save their creative energy for more valuable projects.

This person is highly self-satisfied and not distracted by the need for approval of others. They are confident in their ability to complete tasks and may not objectively evaluate how their actions could impact results because they truly don't expect to be the cause, even indirectly, of any potential downfalls. As a result, they could dismiss constructive criticism.

Make it clear to them that in order to ensure that goals are attained, it is critical for everyone to perform regular self-analysis. Although they may not believe that their behavior could jeopardize results, they need to realize that even the strongest employees have behavior patterns that could impact goal accomplishment. Get them into the habit of taking an objective look at their actions and the possible ramifications if they do not make needed adjustments.

Insights on what motivates and drives each individual

Suggestions to facilitate onboarding and management

Questions? Contact Us!

ChallyAssessment@chally.com

800.254.5995 | 937.259.1200

Available 8:00am – 5:00pm EST; Monday-Friday



800.254.5995 | 937.259.1200
www.chally.com | info@chally.com

