

Chally Leadership Progression

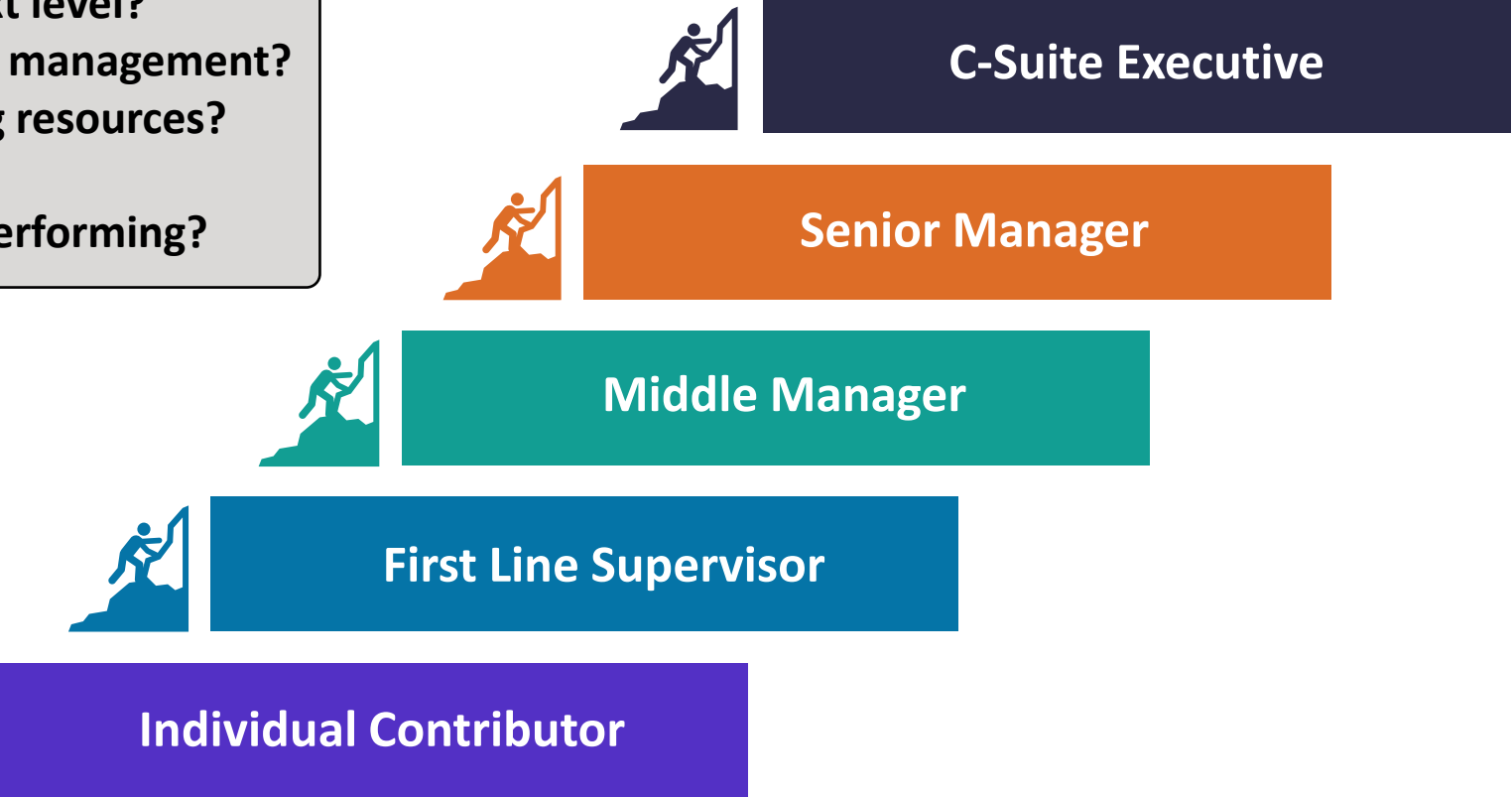


Overview

- Leadership Progression Overview
- Sample Deliverables
- Case Study

Chally Insights into Succession Planning

Who is capable of leading at the next level?
What strengths/weaknesses exist in management?
Where should we invest our training resources?
When is the right time to promote?
Why are strategic initiatives underperforming?



Chally's Leadership Progression

Individual Contributor	First Line Supervisor	Middle Manager	Senior Manager	C-Suite Executive
Focuses on Measurable Outputs	Analyzes and Resolves Customer Problems	Makes Profitable and Pragmatic Recommendations	Leads with a Profitable and Efficient Approach	Initiates Necessary Changes to Advance Corporate Strategies
Champions Initiatives and Leads Change	Self-Directed	Champions Initiatives and Leads Change	Prioritizes Tasks	Effectively Directs Others Across Multiple Levels
Demonstrates Learning Orientation	Effectively Manages Competing Influences to Prioritize Organizational Objectives	Time Management	Builds Business Acumen	Inspires Accountability and Teamwork
Prioritizes Tasks	Fosters Collaboration to Achieve Shared Goals	Demonstrates Learning Orientation	Takes Ultimate Responsibility for Results in a Leadership Role	Makes Intuitive Decisions Based on Available Information
Analyzes and Resolves Customer Problems	Takes Ownership for Results When Working Within a Team	Takes Managerial Accountability for Team's Results	Effectively Directs Others Across Multiple Levels	Makes Well-Researched Decisions
Motivated by Attention To Detail	Directs and Manages in a Team Setting	Directs and Manages in a Team Setting	Inspires Accountability and Teamwork	Crafts Written Communications that are Precise and Deliberate
	Coaches Others and Provides Timely Feedback	Engages Others in Learning and Assesses Understanding	Navigates Organizational Structure by Building Champions	Navigates Organizational Structure by Building Champions
	Provides Real-Time Training and Support		Aligns With and Supports Organizational Vision	

*These profiles also include the 4 management orientation and approach competencies.

4 Management Orientation and Approach Competencies

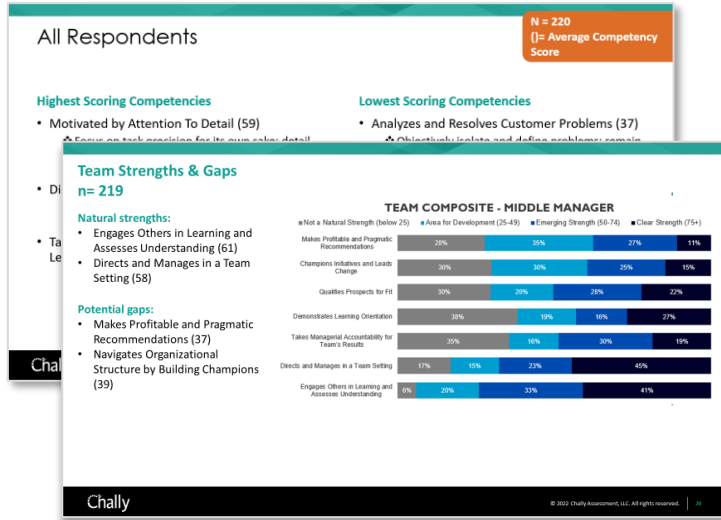
These additional competencies that are included in the Senior Manager and C-Suite Executive Profiles

- Management Orientation
 - Directs Business Processes to Ensure Bottom-Line Results
 - Makes Business Decisions via Collaboration and Consensus
- Management Approach
 - Employs Innovative and Creative Solutions to Business Needs
 - Optimizes Existing Processes and Systems

Sample Deliverables

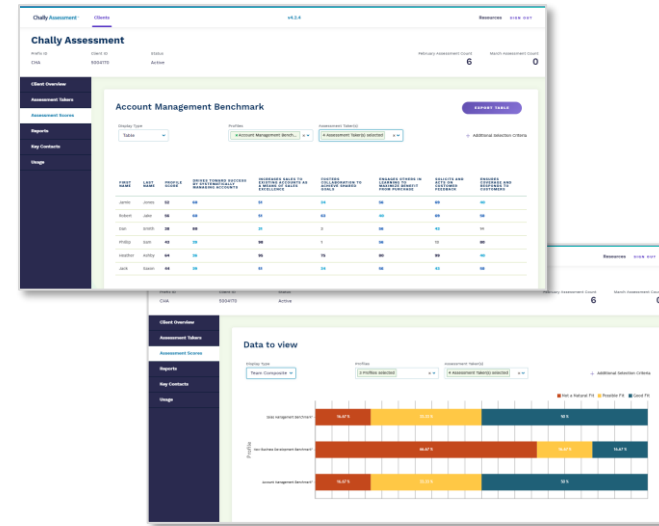
Top Down Transformation

Talent Audit



Results Summary

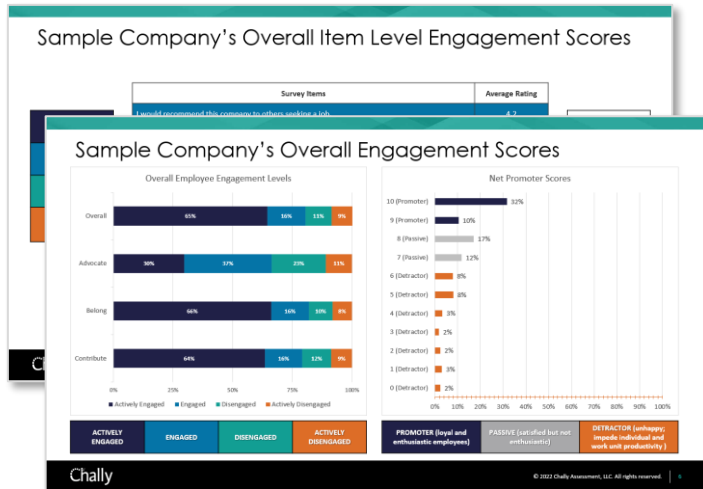
- Summary and key takeaways of the capacity of the organization
- Actionable insights



Results Dashboard

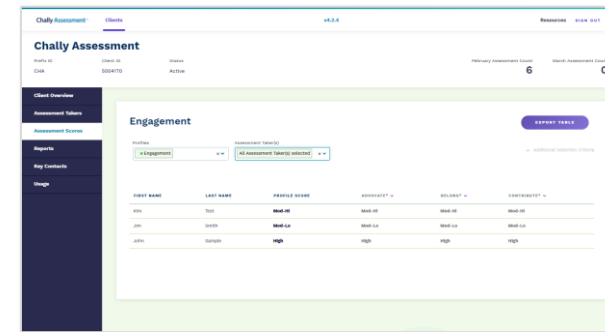
- Competency scores by job profile and specific roles
- Filterable by Team and Assessment Taker

Engagement



Results Summary

- Summary of organization and work group data
- Actionable insights



Results Dashboard

- Stack rank candidates and teams
- Filterable by score and sphere of engagement

Coaching and Development Report

August 17, 2022

Assessment Results

Name Profile Index
Bill Sample Middle Manager Index

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.

Middle Manager Index Competencies	Percentile Score
Makes Profitable and Pragmatic Recommendations	Not a Natural Strength
Champions Initiatives and Leads Change	Emerging Strength
Time Management	Clear Strength
Demonstrates Learning Orientation	Emerging Strength
Takes Managerial Accountability for Team's Results	Emerging Strength
Directs and Manages in a Team Setting	Emerging Strength
Engages Others in Learning and Assesses Understanding	Area for Development

Validity Score

The validity scales within the assessment indicate that this individual was exceedingly candid in answering the questionnaire and went out of the way to admit limitations.

In-depth results for Middle Manager Index

COMPETENCY 17

Makes Profitable and Pragmatic Recommendations

Proactively weighs decisions, recommendations, and actions against their impact on the bottom-line; looks for options that accomplish what needs to be done without compromising profitability; understands the economics of the processes of their own organization and those of customers; leverages knowledge of the business and the customer to provide recommendations that are efficient and practical

Not a Natural Strength	Area for Development	Emerging Strength	Clear Strength
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Skill/Capability Level

This individual may not make an effort to understand the economics of the processes they use as well as those of their customers. They may not realize the importance of seeing the big picture and, as a result, may make recommendations to customers that enhance profitability in one area of the business while compromising effectiveness in another. When dealing with a challenge, they might choose the solution that is most convenient or more likely to impress others instead of evaluating the situation and then selecting the most practical and efficient option. They might not understand the need to base their decisions on their economic impact and, consequently, could compromise profitability.

Coaching Suggestions

Encourage them to familiarize themselves with all aspects of their customer's business and processes. Explain that the more they learn about the customer's organization, the better they can contribute to the decision-making process by offering suggestions that will increase overall profitability and put them in the position of being a valued advisor. In short, improving the customer's bottom line has the added benefit of furthering their own career. Remind them that the fastest, most elegant solution is not necessarily the best option. Very often, the bold and creative that look impressive on the surface can compromise the profitability of the organization as a whole. While an ostentatious solution may work occasionally, very often the straightforward, simple approach is best. The key is to weigh the economic impact that each option will have and then choose the one that allows the job to be done while producing the most profit.

COMPETENCY 27

Champions Initiatives and Leads Change

Demonstrates a willingness to take action on problems or opportunities without prompting; possesses the intrinsic desire and willingness to push toward achieving a desired goal or end-state without suggestion from others; prepares alternatives so the outcome is not jeopardized by unexpected barriers; exhibits the desire to blaze new trails as a means to an end

Not a Natural Strength	Area for Development	Emerging Strength	Clear Strength
------------------------	----------------------	-------------------	----------------

Skill/Capability Level

This individual manages plans and stays alert to potential obstacles. For the most part, they have alternatives ready if plans go awry and will likely employ them without waiting for direction from superiors. They change the present status they feel is inadequate in order to improve the position of the group or organization in meeting its objectives.

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
This person keeps a positive attitude by constructively channeling day-to-day frustrations. They focus on finding solutions rather than dwelling on the negative. However, others may feel that they don't always give negative situations sufficient thought or reflection if the reaction is mild.	Explain that others may not understand how this person can consistently avoid getting bogged down when negatives occur. Offering a simple expression of frustration and then moving on as though nothing went wrong could give others the impression that the full importance of negative events is not grasped or that there is no interest in preventing problems from occurring. Provide verbal and visual cues that will let others know that failure is being taken seriously and that they have a strong commitment to results.
They enjoy close personal relationships, but have a strong need to maintain a sense of objectivity and professional logic when dealing with others. They will be reluctant to engage in close, informal relationships until they can be certain that their trust is well-placed. Although this can build a reputation for fairness, it could also give others the impression that they are un sociable.	Help them to set boundaries without seeming standoffish. Provide them with ideas that can help them turn down invitations in a lighthearted manner that shows genuine interest, yet expresses a need to remain professional. With a few well-chosen words, they can make their feelings clear to colleagues in a non-offensive manner.
This person wants to be where the action is, to be included in what's happening and to be seen as important or worthwhile. They will enjoy attention and respond enthusiastically to a position of visibility. They are willing to accept, and get involved in, controversial situations as part of a highly visible role. They could be reluctant to accept a position or assignment that they see as unimportant or that keeps them away from the center of activity, if expected to sit on the sidelines, they will become bored and/or frustrated.	Provide them with a position where they are able to be visible and involved. Monitor situations to be sure their participation is welcome. If it is not possible to give them the high profile role they desire, then try to include them in key activities on occasion. For example, since they will not shrink away from conflict, assign them to mediate an important issue. Remember that they need to feel included in what is happening in order to achieve job satisfaction.
This individual wants to influence the direction of a decision by seeking consensus rather than by selling what they believe is right. They listen to the views of dissenters and work with them to achieve a solution that is agreeable to all parties involved. They will feel uncomfortable if placed in a position that requires independent work without the feedback and input of others.	Enhance their performance by providing them with an environment of mutual support. Encourage their need for collaboration, but keep an eye out to ensure their deadlines are being missed or that any compromise are not jeopardizing the end result. Explain that collaboration can often be a useful tool, but that there will be circumstances when it is not the most efficient means by which to find a solution. Help them to realize that there will be occasions when the group is not properly equipped to make an appropriate decision. In those cases, they will either have to educate and then guide constituents to a final decision, or they will have to try to work independently. When working independently, make it clear that they can rely on superiors for support to offset any doubts of feeling completely alone.
This person likes to have people available at all times for interaction. Instead of using private time to reflect upon their actions, they prefer to take a social, friendly approach to minimizing the negative impact of difficult situations. They make suggestions and deliver news to others and then respond appropriately to any reactions. They enjoy handling issues in an impromptu manner and will feel uncomfortable if required to interact via more formal means.	Explain that there will be situations when it will be necessary to choose their words carefully. Although a casual, impromptu approach may work in most cases, sometimes a more measured, formal response will prevent further problems. Work with them to identify these situations and have them commit to writing thoughts and suggestions down for review. Allowing them to interact freely and then requiring them to spend time alone only when necessary will strike the balance needed to handle most situations and still maintain their overall job satisfaction.
This person prefers a methodical and deliberate pace that allows ample time to check their work. They enjoy projects that require a good deal of concentration and accuracy and will become tired and irritated if placed in a fast-paced environment with quick turn-around times.	Review their work process to see when and where the pace starts to lag. Challenge them to gradually increase the amount of time they can maintain a faster pace. By slowly raising the bar on pace requirements, they will eventually adapt to anticipated endurance levels and keep up with faster-paced co-workers.
They prefer to be in control of quantifiable results so they can measure completion of goals. They like to be able to gauge their progress and thus, need clearly delineated targets and tasks. They want to check tasks off a list and might become frustrated if required to work on projects with less tangible results.	Detailed task lists will be most effective for this person. Giving them an assignment without fully describing requirements and targets will not provide the structure they need to feel they are making progress toward meeting objectives. They are interested in measuring their activities, milestones, and goals quantitatively, so be certain to give them the information needed to organize their duties. Their aim will be to stay busy, feeling a sense of accomplishment as they check off tasks and see tangible progress.

Chally Assessment

Index Report
Bill Sample

Prepared for:
Chally Assessment

Chally

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Bill Sample 2

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Bill Sample 3

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Bill Sample 7

Sample Individual Leadership Strengths Report

November 3, 2022

Chally Assessment
Leadership Strengths Report
John Sample

Prepared for:
Chally Assessment (Demo)

Chally

Assessment Results

Name: John Sample | Report: Leadership Strengths Report

Summary

This section provides results for a selected set of competencies. All scores shown are percentile scores which range from 1 to 99. Percentile scores allow you to compare this individual's scores with a group of others who took the assessment. A score of 67, for example, indicates that the person scored better than 67% of other respondents.

Leadership Competencies	Percentile Score
Commits Extra Effort to Ensure Success	97
Builds Credibility by Sharing Knowledge	97
Takes Ultimate Responsibility for Results in a Leadership Role	96
Works Rapidly and Efficiently	96
Self-Directed	94
Commits to Continued Professional Development	94
Anticipates Obstacles that Could Impede Progress	94
Inspires Accountability and Teamwork	93
	93
	93

Personal Attributes	Percentile Score
Maintains Active Pace	96
Possesses an Optimistic Perspective	95
Effectively Manages Frustration	95
Demonstrates Loyalty and Commitment	95
Proactively Mentors and Supports Others	92

Orientation/Approach Attributes	Percentile Score
Directs Business Processes to Ensure Bottom-Line Results	90
Makes Business Decisions via Collaboration and Consensus	95
Employs Innovative and Creative Solutions to Business Needs	68
Optimizes Existing Processes and Systems	84

Interpretation of Strengths

Leadership Competencies

LEADERSHIP COMPETENCY 1/10

Commits Extra Effort to Ensure Success

Thrives on working; tends to achieve higher results in direct proportion to the time they are willing to commit to their work; remains focused on the goal and not easily discouraged or distracted; uses work as an opportunity for interaction and incorporates interpersonal contacts into task accomplishment; sees work as a major source of personal satisfaction

Score Interpretation: 97

This individual sees their job as a very important and enjoyable part of life. Because of the personal satisfaction they derive from work, they're willing to balance work and life priorities to advance their job objectives. They are hardworking and rarely leave tasks unfinished in order to engage in more personally enjoyable pursuits. They do whatever is necessary to ensure the job gets done. They are always on the lookout for tools, resources, techniques, and processes that will benefit their job. In those cases where the tools are not provided by the organization, they will work to create their own.

LEADERSHIP COMPETENCY 2/10

Builds Credibility by Sharing Knowledge

Builds credibility in a resource role by remaining factual and timely in providing information; maintains sources for quick access to time-sensitive information and to stay abreast of new developments; proactively educates customers or shares information as part of the service they deserve

Score Interpretation: 97

This individual takes pride in being a credible resource of up-to-date and relevant information for others. They work to be informative and objective as they provide information they believe will be most useful. They develop and maintain a network of internal and external resources to tap for current information. They stay in touch with these resources so that they can inform others of new developments that may have an impact on goal achievement.

© Chally Assessment, LLC | John Sample 4


Sample PAR Report (Motivations & Habits)

October 16, 2020

Chally Assessment™

Personal Assessment Results Report
Joe Sample

Prepared for:
Chally Assessment, LLC



MAP: TASK MOTIVATIONS

TASK MOTIVATION 1/3

PRODUCE EXCELLENT RESULTS

The drive to reach new levels of achievement in building systems that produce tangible outputs; thrive on challenge to improve results

0 10 20 30 40 50 60 70 80 90 100 **23**

Strong Left Neutral **Strong Right**

STRONG LEFT: NEED TO CONTROL RISK **STRONG RIGHT: PROMOTE GROWTH THROUGH INNOVATION**

Focus on incremental improvements to output or profitability	Like unique, new and different solutions, especially if seen as a breakthrough
Prefer to anticipate and remove obstacles before starting	Justify a growth-oriented approach in terms of future potential
Resourceful within the confines of existing methods or procedures	Embrace in business fu
Uncomfortable risking what is 'good enough' to pursue a new idea that could fail	Adopt the r to be gained
Minimize and control risk in order to optimize efficiency	Welcome th different app
Refine and maintain established systems at an effective level	Eager to fie and error, n getting mon technology
Strive for stability and focused on results	

BEHAVIORS/CHARACTERISTICS 8/12

COMPETITIVENESS

The habit of trying to win, specifically in competition against others

0 10 20 30 40 50 60 70 80 90 100 **47**

Left **Situational** **Right**

LEFT: SUPPORTIVE AND COOPERATIVE **RIGHT: COMPETITIVENESS**

Prefer a cooperative effort with others to a ment that creates rivals or	Enjoy the challenge of competition and comfortable with situations that produce a winner and a loser
phy of 'all for one and one for all' in nmon objectives	Seek and gather the resources needed to position yourself to win
at promote winners and losers, and ings of disappointment and failure	Unwilling to give up or accept failure if not immediately rewarded with success
ise and 'give and take' efforts in partial level of success rather than cause compromise was	Refrain from turning competition into a personal attack

MAP: INFLUENCE MOTIVATIONS

INFLUENCE MOTIVATION 1/4

INFLUENCE OTHERS

The drive for influence and the power to accomplish greater outcomes than one could do personally

0 10 20 30 40 50 60 70 80 90 100 **55**

Strong Left Neutral **Strong Right**

STRONG LEFT: NEED TO ASSERT OWN DECISIONS **STRONG RIGHT: CONSENSUS BUILDING APPROACH TO INFLUENCING OTHERS**

Have a directive style when influencing a group, which works best when others are less experienced or expert	Believe you can have the greatest impact on your surroundings by embracing a democratic approach that encourages cooperation and collaboration
Prefer to control decisions and will not compromise authority just to support what is most popular or comfortable	Draw ideas and suggestions from all sides to be sure of buy-in to the final approach
Stand by your decision or solution rather than give in for the sake of group consensus	Willing to concede your preferred method or solution, if needed, to arrive at a consensus that works best for the group
Willing to work around dissenters	Have a participative style when influencing a group, which works best when all are competent
Usually seen as pragmatic and practical and will exercise authority to achieve an efficient or effective outcome	Work to maximize team effectiveness

Case Study



Leadership Progression Case Study

PROBLEM

A family office investment firm specializing in speed to close acquired a **1,600-person** transportation and logistics business.

Management needed to rapidly assess talent at varying levels of the organization to understand which incumbents were equipped to succeed in existing roles and where to best focus development dollars.

SOLUTION

Chally performed a **Talent Audit** using the **Leadership Progression Index** to understand readiness at five levels: Individual Contributor, Front-Line Supervisor, Middle Manager, Senior Manager, and C-Suite Executive

RESULT

- Chally identified collective trends from each of the five levels and delivered **Coaching & Development Reports**
- Findings highlighted that the strategic vision set by corporate cascaded to regional leaders but lost its strength beyond Senior Managers (e.g., Most Senior Managers had very high competency scores on “leading with profitability in mind,” but the same Senior Managers had very low competency scores on “gaining commitment by motivating others”)
- Chally findings empowered new ownership to determine key watch-outs in the leadership and guide timely, cost-saving decisions

Executive Summary Snapshot

Company Results

Individual Contributor

PREDICTIVE COMPETENCIES	DEFINITIONS
Focuses on Measurable Outputs	Focus on the quantity of tangible outputs produced within a given timeframe
Champions Initiatives and Leads Change	Takes the lead on specific, targeted business issues requiring change even if others do not understand or approve
Demonstrates Learning Orientation	Leverage technical competence and technology; learn for the sake of learning
Prioritizes Tasks	Follow rational, pragmatic steps to help address task urgency when prioritization must be strategic and proactive; a decision of what to prioritize must be made
Analyzes and Resolves Customer Problems	Objectively isolate and define problems; remain engaged until problem is resolved
Motivated by Attention To Detail	Focus on task precision for its own sake; detail orientation as a constant standard for self and others

First Line Supervisor

PREDICTIVE COMPETENCIES	DEFINITIONS
Analyzes and Resolves Customer Problems	Objectively isolate and define problems; remain engaged until problem is resolved
Self-Directed	Take initiative to set goals and complete work with limited supervision
Effectively Manages Competing Influences to Prioritize Organizational Objectives	Focus on major job priorities and ensure they are aligned with organizational goals
Fosters Collaboration to Achieve Shared Goals	Work collaboratively in a group setting to achieve shared results
Takes Ownership for Results When Working Within a Team	Take responsibility for results and mistakes as an individual contributor
Directs and Manages in a Team Setting	Delegate and follow up to ensure span of control is functioning in line with business unit goals
Coaches Others and Provides Timely Feedback	Share techniques with others through personal coaching and role modeling; create opportunities for observation and feedback
Provides Real-Time Training and Support	Train others by providing factual information or data in an informal, hands-on learning environment; seek to provide the knowledge that can increase others' effectiveness

Middle Manager

PREDICTIVE COMPETENCIES	DEFINITIONS
Makes Profitable and Pragmatic Recommendations	Leverage products or services to make recommendations that are cost-effective and beneficial for clients' operations
Champions Initiatives and Leads Change	Take the lead on specific, targeted business issues requiring change even if others do not understand or approve
Time Management	Organizes a complex workload and objectively reprioritizes tasks as each day progresses while maintaining progress of regularly scheduled work; a decision of how to prioritize must be made
Demonstrates Learning Orientation	Leverage knowledge and competence; learn for the sake of learning
Takes Managerial Accountability for Team's Results	Take responsibility for results even in the absence of direct or indirect control
Directs and Manages in a Team Setting	Delegate and follow up to ensure span of control is functioning in line with business unit goals
Engages Others in Learning and Assesses Understanding	Train others by providing factual information or data through prepared and formal programs designed to follow a structured outline; regularly assess individual and group progress

Senior Manager

PREDICTIVE COMPETENCIES	DEFINITIONS
Leads with a Profitable and Efficient Approach	Show a realistic grasp of financial aspects of the organizational evolution and how it impacts customers; seek effectiveness and efficiency at multiple levels
Prioritizes Tasks	Follow rational, pragmatic steps to help address task urgency when prioritization must be strategic and proactive; a decision of what to prioritize must be made
Builds Business Acumen	Achieve and maintain professional proficiency; understand technical and business standards
Takes Ultimate Responsibility for Results in a Leadership Role	Take responsibility for being accountable in a corporate setting where results are achieved indirectly through others
Effectively Directs Others Across Multiple Levels	Delegate through formal processes and follow up to ensure span of control is functioning in line with corporate goals; direct through multiple levels or in a complex infrastructure
Inspires Accountability and Teamwork	Understand how to motivate others in a team setting to help them achieve top results
Navigates Organizational Structure by Building Champions	Understand motivations of peers, direct reports, or external forces and seek to collaborate with others to ensure success; seek to minimize impact across multiple agendas/objectives
Aligns With and Supports Organizational Vision	Share the corporate vision and establish the mindset to accomplish strategic objectives

C-Suite Executive

PREDICTIVE COMPETENCIES	DEFINITIONS
Initiates Necessary Changes to Advance Corporate Strategies	Initiate change that will support, enhance, or advance current corporate objectives, even in complex environments
Effectively Directs Others Across Multiple Levels	Delegate through formal processes and follow up to ensure span of control is functioning in line with corporate goals; direct through multiple levels or in a complex infrastructure
Inspires Accountability and Teamwork	Understand how to motivate others in a team setting to help them achieve top results
Makes Intuitive Decisions Based on Available Information	Demonstrate timeliness in making sound and critical corporate decisions when there is limited data to draw upon
Makes Well-Researched Decisions	Make thorough, well-researched decisions that are compatible with overall goals and priorities in a corporate setting
Crafts Written Communications that are Precise and Deliberate	Provide written information that is organized, succinct, and leaves no room for misunderstanding or misinterpretation
Navigates Organizational Structure by Building Champions	Understand motivations of peers, direct reports, or external forces and seek to collaborate with others to ensure success; seek to minimize impact across multiple agendas/objectives

Management Orientation and Approach

PREDICTIVE COMPETENCIES	DEFINITIONS
(Orientation) Directs Business Processes to Ensure Bottom-Line Results	Leverage a directive management approach to holding others accountable for results
(Orientation) Makes Business Decisions via Collaboration and Consensus	Leverage a participative management approach to providing information, expertise, advice, and follow-up support that influences and assists line managers in making quality decisions
(Approach) Employs Innovative and Creative Solutions to Business Needs	Focus on innovative or creative solutions to addressing business needs; measure the process (how well was it done)
(Approach) Optimizes Existing Processes and Systems	Focus on measurable and near-term results and outputs; measure the result (did it work)