

Chally Assessment™

Coaching and Development Report Joe Smith

Prepared for:
Chally Assessment, LLC



Assessment Results

Name

Joe Smith

Profile/Index

Outbound Inside Sales 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

Makes Persuasive Presentations	Emerging Strength
Builds Business by Proactive Customer Contact	Not a Natural Strength
Maintains Active Pace	Area for Development
Highlights Standard Benefits when Addressing Buyer Concerns	Clear Strength
Updates Working Knowledge of Offerings to Provide Recommendations	Emerging Strength
Commits Extra Effort to Ensure Success	Emerging Strength

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 Outbound Inside Sales Benchmark

COMPETENCY 1/6

Makes Persuasive Presentations

Excites the customer with an enthusiastic presentation style; demonstrates value and actively promotes products and services by making an emotional appeal; holds the customer's attention and interest by keeping the presentation content relevant; varies style to build toward a buying decision



Score Interpretation

For the most part, this individual's exciting and enthusiastic presentation style is designed to pique the interest of prospects. They can take charge and keep control of the information being communicated through a presentation that is polished and rehearsed.

Builds Business by Proactive Customer Contact

Takes a proactive approach to finding additional business opportunities; comfortable with the networking and cold calling needed to find new prospects and customers; takes the lead in meeting people and building a contact base for new business development

Not a Natural Strength	Area for Development	Emerging Strength	Clear Strength
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Score Interpretation

This individual may not initiate customer contact, or may lack persistence in sustaining the contact if other activities are more appealing or pressing. They might have difficulty sticking with a customer call long enough to unearth new needs and, as a result, fail to penetrate the account and expand business. Cold calling might not be easy for them because they are not comfortable interacting with people when the aim is to promote new or existing offerings. They might be distracted by prospects and have trouble keeping the focus on the reason for the call.

Coaching Suggestions

Although they may believe that their job is simply to fulfill customer requests and then dispense with a call quickly, they'll need to be reminded that putting some extra time into the process can be highly beneficial. Have them commit to spending more time on the calls. Did the additional time give a better feel for the customers' requirements? Were they able to think of additional solutions and services that may be of value to customers? Point out how a little extra time and effort can go a long way toward business expansion. Provide them with a script of questions that could be valuable in unearthing additional customer requirements and then encourage them to make suggestions based on customer responses. By preparing questions, they will be better armed to take control of the contact and lead the customer to a final purchase decision.

Maintains Active Pace

Keeps up a brisk pace without becoming fatigued; pushes physical resources to the limit during periods of peak demand; takes pride in the amount of work accomplished; approaches work with considerable energy and stamina despite distractions or unreasonable demands

Not a Natural Strength	Area for Development	Emerging Strength	Clear Strength
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Score Interpretation

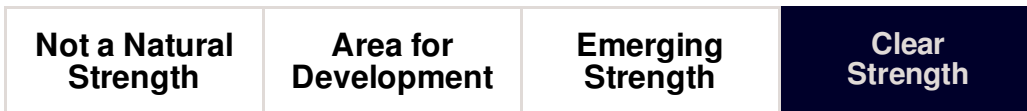
This individual might prefer a methodical approach at a measured pace in order to have time to check their work for mistakes. They might not feel comfortable moving quickly, and thus may complete tasks at a slower pace than expected for them. They may need too much time to recoup their endurance when tackling a high volume of work.

Coaching Suggestions

Remind them that although taking a methodical approach and working at a pace that allows them to check the work for errors is commendable, certain circumstances require swift action - not deliberate movement. Encourage them to change one part of their work process that slows them down. For instance, if they triple-check the work, challenge them to double-check it and leave it alone. From there, give them another challenge that modifies their behavior in a small way. By tweaking bits and pieces of the routine gradually, they will eventually break the old behavior patterns.

Highlights Standard Benefits when Addressing Buyer Concerns

Recognizes that the limited opportunity for negotiation requires a questioning of customer objections to uncover the 'hot button' that established or standard features and benefits will address; actively listens and clarifies benefits; is well-informed of features and benefits; helps the prospect/customer understand why the proposed product offering is the best alternative



Score Interpretation

This individual uses a logical process for uncovering customer objections. They remain results oriented and positive as they calmly and patiently work to understand the root of the issue that their product or service will address. They work to make the customer understand why the proposed offering is the best alternative. They believe strongly in the benefits the system offers and are able to convey that belief to the customer by presenting relevant information that will dispose of any objections.

Updates Working Knowledge of Offerings to Provide Recommendations

Possesses a working knowledge of products and applications as the backbone for understanding customers' needs and making suggestions for solutions; keeps abreast of (or contributes to) product/service developments, changes, and improvements designed to enhance competitiveness and achieve market preeminence; concentrates on acquiring knowledge that is less comprehensive and more focused on what specifically impacts the customer; builds knowledge base through real-world applications; uses product knowledge as a means to an end in providing appropriate suggestions to meet specific customer needs



Score Interpretation

This individual tries to stay up-to-date on current and relevant system modifications. As a rule, they recognize that their credibility as a resource is dependent on an ability to provide the latest information that addresses customers' needs, questions, and challenges. They prefer to learn and share experiences through personal interaction instead of more formal reading or studying. They feel that observing and asking questions is usually an effective way to gain valuable information and they use that insight to serve as a resource.

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

Not a Natural Strength	Area for Development	Emerging Strength	Clear Strength
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Score Interpretation

This individual's job is an important and enjoyable part of life. For the most part, they enjoy working and, therefore, could be comfortable taking advantage of some opportunities that arose during non-business hours. As a rule, they understand the importance of completing tasks in a timely manner. As such, they usually remain focused when the commitment to their work is threatened by internal or external distractions. They build into their schedule the time to lay the groundwork for goal achievement. They take their job seriously and therefore, will generally use personal time to devise a game plan to success.

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

This individual follows a system of guidelines in approaching tasks, choosing to address key issues and allowing details to fall into place on their own. They prefer not to deal with minutiae which, in turn, allows them to complete most basic assignments efficiently. However, when a task requires one to dig beneath the surface, they may not know what questions to ask to find information, which might lead to difficulty in finding a satisfactory solution.

This individual is comfortable with spontaneous expression. They prefer to react to unexpected situations quickly rather than to waste time evaluating a course of action because they understand the need to take advantage of opportunities before they slip away. They don't like to be limited to accepted methods, and will think outside known parameters to find new solutions. They need a relaxed and flexible work environment and will tend to shy away from positions that require a controlled and guarded approach to work and communications.

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 strongly motivated to be part of a group of close and mutually loyal associates. Their desire to make stronger connections with certain people may limit their ability to objectively evaluate their competence. If placed in a position where they cannot actively build close relationships because of a need for objectivity, they will quickly feel strained by the need to avoid the perception of favoritism.

Manager's Tips

Give them straight feedback and clear explanations on areas of ineffectiveness that may be a result of too broad a perspective. Point out what could have been done differently to produce the desired result, while simultaneously minimizing negatives. Discuss the level of quality that is being sought and help them understand that although following broader guidelines is commendable, in certain cases, a deeper attention to detail is required to achieve objectives.

Although spontaneity can be a commendable quality in a fast-paced environment, explain that specific situations call for a more measured, methodical approach. For example, diving into a large, detailed project without first outlining a course of action and weighing the possible outcomes could lead to problems farther down the road. Likewise, jumping at a job opportunity without finding out precisely what the job entails could be costly. Encourage them to strike a balance by making a habit of taking a few minutes to assess a situation before reacting. Those few minutes may be all it takes to realize that their original course of action may be inappropriate.

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.

Help them to understand that although it is commendable to build relationships based on loyalty and mutual support, there may be times when there needs to be a more objective approach to decision-making. For instance, objectives that are best for the organization may not benefit those closest to them. Likewise, the people who can help them to achieve goals, may not be people with whom they feel they can establish a close connection. It is during these times, when they will need to focus on what is necessary for goal completion and find other, non-business means by which to satisfy relationship needs and demonstrate loyalty.

This person shows confidence taking the lead in discussions and is comfortable making their views known. They have no difficulty asserting their opinions, however, because of their sheer force of will, others could find this intimidating. Frustration could build in this individual if placed in a situation that requires them to take a more passive or compliant role.

They can be seen as too assertive, often persisting in their demands until satisfied that their efforts have had the desired result. Caution them not to jeopardize their message with an overly aggressive manner, and remind them that overpowering a situation can result in them winning the point but losing support. Role play so that they can practice expressing ideas in a way that still leaves room for the opinions of others. Point out how to gain others' support rather than forcing ideas on them.

This individual might seek high-pressure situations because they enjoy the challenge. However, they might not take the time to anticipate problems which could occur because they aren't afraid of the unexpected. As a result, they could take on more stress than they can handle, and objectives could be jeopardized.

If allowed, they would prefer to work under constant pressure. However, long-term stress can deplete them, thus causing the quality of the results produced to be minimized. Therefore, it may make sense to help them divide long-range assignments into time segments so that they can maintain a healthy balance between the pressure required to spur them onward and the stress that could push them toward burnout.

This individual possesses a need to compete, whether with their past performances or with others. Because they are driven to constantly surpass past results, they tend to view each situation as having a winner and loser. They see competition as a means of reaching higher levels of achievement and, therefore, will not be satisfied in an atmosphere that rewards everyone equally, despite the results produced.

Although they will be happiest in situations that appeal to their competitive nature, explain that not every assignment is a contest and that they need to downplay the confrontational spirit of interactions or they may isolate others. Help them see that although the need to win is not meant as a personal attack on colleagues and constituents, when in an environment of cooperation, such an attitude may be seen as overly aggressive. Encourage them to save such competition for non-business hours.

This individual is a people person and seeks situations in which contact with a wide variety of individuals is possible. Engaging these acquaintances in conversation comes easy for them. It satisfies a social motivation to build a wider circle of successful or influential contacts, therefore they need opportunities to meet new people. A position that requires isolation from others could lead to boredom and/or frustration.

This person will not be happy or productive being stuck behind a desk. Find opportunities for them to interact and make new social connections. With their people skills, they can form valuable business relationships and broaden the company's sales and reference base, as well as gain vital information about competitors or new trends. However, be certain to provide them with objectives before being sent into social situations, for they could get caught up in the social element of the interaction and forget about the business purpose. Coach them about always approaching a meeting with a definite goal in mind. A stricter routine will help keep them focused on this goal, rather than the more enjoyable social interaction, requiring them to build solid business relationships as well.

This individual sets hard-line standards for personal effort and expects others to do the same. They will find great satisfaction in assisting people who are eager to learn, but may grow impatient working with those who are less ambitious. As such, they will be reluctant to take on a position that requires them to spend too much time hand-holding or giving unsolicited advice. They do not mind helping others or sharing expertise, but only if others are appreciative and willing to act on the advice.

Do not expect them to cooperate with or spend much time helping anyone who is not obviously committed to making an extra effort. They need to know that their expertise is being met with a satisfactory level of dedication and motivation. Keeping this in mind, try to implement a two-tiered teaching program wherein co-workers with little experience are paired with an individual who enjoys more hands-on mentoring activities. After the basics have been mastered and a willingness to learn demonstrated, pair the student with them for any additional information and more in-depth training.

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.



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