Chally Assessment ™

Profile Interpretation Manual

Account Management Benchmark

Signature Profile

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Benchmark Profile Description

The Account Management role grows sales to existing accounts by increasing sales to current buyers and/or expanding sales through new buyers within the account. Account Managers are tasked with building customer relationships, meeting or exceeding customer needs, and making it easy to do business with their company. Key activities include account planning and partnering with internal support networks to facilitate special requests, even in off hours.

Predictive Competencies

- Drives Toward Success by Systematically Managing Accounts
- Increases Sales to Existing Accounts as a Means of Sales Excellence
- Fosters Collaboration to Achieve Shared Goals
- Engages Others in Learning to Maximize Benefit from Purchase
- Solicits and Acts on Customer Feedback
- Ensures Coverage and Responds to Customers

Predictive Competencies

Drives Toward Success by Systematically Managing Accounts

Consistently meets or exceeds sales targets through personally controlling the critical aspects of the sales processes; systematically works each account plan and anticipates problems in order to work around them; is driven to win customers' attention and treats their business as an honor, never letting them feel taken for granted

LOW SCORES	HIGH SCORES
▪ May adopt a casual or relaxed approach that fails to project personal commitment or dedication	▪ Meets or surpasses sales goals as a means to gain more freedom and independence
▪ Is comfortable with achieving average results, rising above the bottom of the performance chart but not striving to be the best	▪ Maintains personal control over those aspects of the sales and delivery process identified as top priorities
▪ Adopts a more interdependent and team-oriented approach to accomplishing goals	▪ Sets high self-expectations and holds associates to the same stringent standards of dedication
▪ May depend too much on fate or 'being in the right place at the right time' rather than plan and work to make things happen	▪ Expects to encounter barriers a fair percentage of the time and prepares to deal with setbacks or delays in order to ensure the success of plans
▪ Expects account management plan to proceed without the need for careful monitoring and contingencies	▪ Concentrates full energy and attention on systematically accomplishing key tasks
▪ Can take customer relationships for granted and may not work at continually demonstrating appreciation for the business	▪ Places customers on a pedestal and shows them how valued they are

Lower scores may indicate:

- A drive for excellence through a more flamboyant or charismatic approach
- A comfort with achieving average results; it is not imperative to be the best, it is important not to be at the bottom of the performance charts
- An expectation that things will go as planned without the need for careful monitoring and contingencies
- A more interdependent and team-oriented approach to accomplishing goals

Increases Sales to Existing Accounts as a Means of Sales Excellence

Motivated to advance in a sales career by increasing the product diversity offered to existing accounts; concentrates on finding avenues to generate increased sales from established accounts; works to increase revenue by identifying additional products to complement what is currently sold to the existing customer base

LOW SCORES	HIGH SCORES
▪ May be satisfied with moderate growth in sales ▪ Diverts resources from sales effort to respond to administrative tasks ▪ May offer what is familiar to existing customers rather than build a repertoire of products or services that can match additional needs	▪ Driven to generate growth through account penetration and referral and directs effort toward building sales ▪ Unwilling to settle for maintaining the status quo in generating revenue or increasing sales just incrementally ▪ Prefers the efficiency of increasing sales with existing customers to spending the time cultivating new accounts ▪ Takes advantage of opportunities to penetrate existing accounts via new product applications ▪ Builds business with existing accounts by utilizing creative means to answer their needs with the products

Lower scores may indicate:

▪ A tendency to be comfortable with little or modest growth in sales

▪ A preference for a standard sales approach with little innovation and variation

▪ A strong value system that supports the belief that everyone needs the product and should respond to one's prepared sales proposition

Fosters Collaboration to Achieve Shared Goals

Shows skill and ease at working in groups; works with others to achieve better results and forges close working relationships and alliances in order to get things done; is quick to cooperate versus expect others to bend to own wishes; supports joint ownership and shared recognition for results; recognizes the advantages of group participation in planning and problem solving

LOW SCORES	HIGH SCORES
▪ Functions as more of an individualist than as a team player	▪ Works collaboratively in a group effort to effectively accomplish a goal or task
▪ Finds it simpler or more convenient to focus independently on own tasks or direction	▪ Put team and management objectives ahead of their own
▪ Prefers to exercise personal control over results and outcomes	▪ Performs own role effectively on the team and helps team members as needed
▪ More likely to emerge as a leader than an equal player	▪ Forges working relationships and alliances with others in order to get things done
▪ Believes compromise for the sake of cooperation can potentially threaten the quality of the end result	▪ Willing to compromise and give others the benefit of the doubt when there is a difference of opinion
▪ Wants to be personally recognized for individual contributions	▪ Proactively shares information, ideas, suggestions, and support
	▪ Encourages joint ownership and shared recognition for results

Lower scores may indicate:

- A strong need for individual contribution or personal recognition
- A preference for working alone and ensuring the results through personal control
- A desire to be more of a leader than one of the pack
- A belief that compromise may lengthen the time to reach the end result and/or threaten the quality of the desired outcome

Engages Others in Learning to Maximize Benefit from Purchase

Helps the customer to gain maximum benefit from the product or service by committing to continuous education that provides information updates or product training; prepares more structured sessions to cover the most critical areas of learning; stays on top of information needed by customers in an effort to serve as a resource; takes responsibility for motivating customers to update their information; reinforces shared information through periodic repetition; routinely adjusts education process to address individual and group progress or understanding

LOW SCORES	HIGH SCORES
▪ Prefers one-on-one training or a more loosely organized curriculum to the structured requirements of a scheduled class session	▪ Prepares scheduled and consistent programs to train or educate others
▪ Expects the people being trained to be self-motivated to learn and becomes impatient when required to repeat or reinforce already covered information	▪ Establishes measurable criteria for assessing progress in the learning process
▪ Does not implement a tracking process for assessing the effectiveness of teaching efforts or the progress of trainees	▪ Demonstrates patience and a willingness to repeat or reinforce ideas and information until the audience understands
▪ Enjoys working on content delivery and may be more concerned with the audience's assessment of own public speaking skills than with the subject matter	▪ Focuses training sessions on those competencies that will make a difference in the group's ultimate effectiveness
▪ Tries to make the training entertaining at the expense of providing only relevant information	▪ Concentrates more on the results produced or change accomplished through training than with how attractive or entertaining the training can be

Lower scores may indicate:

▪ A tendency to rush through the training without gauging how much is being absorbed or retained by the group

▪ More of a preference for one-on-one coaching and/or more free form curriculum than formal class sessions

▪ A preference for a more off-the-cuff training style

Solicits and Acts on Customer Feedback

Seeks customer feedback regularly to verify satisfaction and uncover minor issues which could escalate if left unattended; solicits suggestions for continuous improvement and demonstrates personal attention to the customer even when there is no problem; listens to feedback without judgment or defensiveness, remaining focused on results rather than personal feelings; stays logical and objective and refrains from expressing personal frustrations; ensures future business by anticipating and removing potential sources of dissatisfaction

LOW SCORES	HIGH SCORES
▪ Assumes that a customer will speak up if there are problems but is otherwise satisfied ▪ Tends to 'let sleeping dogs lie' and is reticent to search for problems that may be in the early stage of development ▪ Finds it difficult to keep emotions in check and remain logical when presented with suggestions for improvement ▪ Takes customer feedback or criticism as a personal jab and may inappropriately display a negative response	▪ Demonstrates continued personal attention to the customer, calling regularly and soliciting suggestions for improvement ▪ Disciplined and consistent in initiating contact with the intent of monitoring satisfaction and detecting potential problems ▪ Welcomes opportunities to demonstrate a willingness to make the customer's experience even better ▪ Aims emotional intensity at addressing a customer's needs or concerns, not at the customer personally ▪ Does not allow the mood or feeling about a customer to alter the degree or quality of the follow-up ▪ Maintains a business relationship versus a social relationship in 90% of the contact

Lower scores may indicate:

▪ A tendency to assume that the customer is satisfied if there is no overt evidence to the contrary

▪ A reticence to ask the customer or a preference for letting the customer dictate the direction and flow of the interaction

▪ A tendency to try and anticipate needs and act without checking to be sure the customer's needs are really understood

▪ A difficulty keeping emotions in check and remaining logical when confronted with suggestions for improvement

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
▪ Believes personal time is off-limits and may resist interrupting leisure activities to deal with work demands	▪ Available after hours to respond to the needs of both internal and external customers
▪ Loses control of their action list and can become overwhelmed by ongoing priorities	▪ 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
▪ May not feel a need to put forth more effort, but will accept delays instead	▪ Resists the distraction of nonwork-related issues that can interfere with the coverage of ongoing priorities
▪ Allows outside distractions, commitments or time demands to consistently take priority and prevent an efficient use of time and resources	▪ Accepts that a strong sense of duty to those who are counting on them cannot always be met during regular working hours
▪ Fails to put into place systems or resources to cover account needs if they are unprepared or unavailable, creating delays in response time	▪ Prepares a back-up system to cover unpredictable or unpreventable overloads in any absence

Lower scores may indicate:

▪ A higher need for short-term, personal gratification from one's activities or the tendency to use one's mood to determine the amount of time to devote to a specific outcome

▪ A tendency to place a higher value on non-work endeavors

▪ A preference for personally handling customer interactions even if that forces delays in response time