Chally Assessment ™

Profile Interpretation Manual

Indirect Sales Benchmark

Signature Profile

Chally

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

Predictive Competencies

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

Expands Business Through Cross Selling

Increases sales with existing customers by stimulating the demand for currently purchased products and services; makes a proactive effort to build volume within established accounts by expanding the breadth of products used; monitors the potential for growth in volume by regularly tracking history and spotting trends or problems in need of a solution

LOW SCORES	HIGH SCORES
- Concentrates efforts on new business development at the expense of maintaining existing accounts - Expects the requirements of existing accounts to be static and automatically met without a need for monitoring or intervention - Waits for the customer to present a sales opportunity rather than monitor a purchasing history and take proactive steps to facilitate the reorder process - Misses opportunities to modify an existing business contract to include new solutions because of inattention to changes in the customer's needs	- Develops a sales plan for increasing business with existing customers that promotes an expansion of the current product line - Pays attention to trends or problems for which the current buying pattern does not provide a solution - Works to generate continued business from existing accounts, emphasizing steady maintenance over periodic 'home runs' - Tracks changes in the customer's organization or specifications that would alter the existing business contract - Monitors product usage or order replenishment status to ensure uninterrupted delivery of the desired benefits

Lower scores may indicate:

- A tendency to expect customer requirements to be static and automatic without the need for monitoring or intervention
- A preference for focusing on bringing in new customers and the thrill of the hunt
- A preference for reacting to opportunities as they arise versus setting a plan and consistently executing the steps

Prepares and Delivers Effective Presentations

Focuses on sharing information in an exciting and memorable manner; prefers group presentations; focuses equally on preparing delivery and content; stages a presentation to promote a more intangible service or solution; responds to audience cues and reactions by altering a prepared presentation as it progresses

LOW SCORES	HIGH SCORES
▪ Prefers to share information in a more spontaneous and off-the-cuff manner	▪ Customizes the program to the audience, using minimal boilerplate components
▪ Does not prepare a presentation with the audience in mind, but starts with a standard framework and makes cursory adjustments	▪ Takes the time to prepare a studied presentation, injecting into the content and delivery the cues and jargon with which the audience can identify
▪ Without the structure of a prepared presentation, could fail to incorporate key components into the presentation or respond effectively to audience reactions	▪ Sensitive to audience feedback and adjusts the presentation to sustain their interest
	▪ Creates a memorable stage presence
	▪ Enjoys applause and attention when successful

Lower scores may indicate:

▪ A preference for spontaneity and minimal preparation when communicating key messages

▪ A tendency to rely on a standard presentation with little customization

▪ Assuming the audience's awareness and level of interest

▪ A tendency to be so involved in the presentation and being the focus of attention that one forgets the goal of persuading toward a buying decision

Closes Through Personal Identification with the Product

Uses strong personal identification with the product to influence others to promote and sell the product line; keeps the distributor fired up and committed to buying into a program or plan; works with other salespeople to help them close the large or elusive deal; breaks up the selling cycle into small increments and sets goals for each step; maintains the pressure to move forward through each step without becoming too pushy or overbearing; proactively reinforces the purchase decision, recognizing the risk that a product or program can be supplanted by the competition

LOW SCORES	HIGH SCORES
▪ Expects the product or solution to stand on its own merits and does not find it necessary to reinforce the benefits and ensure that the distributor is comfortable with the result	▪ Personally believes in the benefits of the product or solution and is willing to stand behind the offering when competing for the distributor's interest or shelf space
▪ Does not take advantage of an opportunity to reinforce the added value of the program by working with the distributor's salespeople to help close a deal	▪ Recognizes that the customer may have second thoughts or is being courted by the competition, and plants additional benefits or recalls to support the commitment to the buying program
▪ Excessive patience and a willingness to wait for developments in the sales process can result in displacement by the competition	▪ Keeps the distributor motivated to promote the product line by working with distribution salespeople to close a challenging sale
▪ Unknowingly loses customers early in the sales process because of not continually assessing their commitment throughout an extended sales cycle	▪ Breaks the sales process into manageable steps, seeking continued agreement from the customer at each step before moving on
	▪ Applies enough pressure to keep a buying commitment from stalling but resists pushing the distributor into a neutral or negative position

Lower scores may indicate:

▪ A tolerance for patience in the selling process with a willingness to wait for things to develop

▪ An expectation that the product/service sells itself without a need to reinforce the benefits and be sure the customer is comfortable with the result

Engages Others in Learning and Assesses Understanding

Demonstrates a commitment to the continuous education and training of others as a means of increasing their overall competency and productivity; prepares more structured sessions to cover the most critical areas of learning for the audience; stays on top of information needed by colleagues and customers in an effort to serve as a resource; takes responsibility for motivating others to learn and retain key information; reinforces what is being taught through periodic repetition; regularly assesses individual and group competencies and routinely addresses them by adjusting the training

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 those being trained to be self-motivated to learn and becomes impatient when required to repeat or reinforce information already covered	▪ 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 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

Coaches Others and Provides Timely Feedback

Understands the critical role modeling and demonstration play in the ongoing development of direct reports; spends sufficient time with direct reports to provide guidance and coaching where needed and commits to regularly creating opportunities to share expertise; provides instruction, positive models, and opportunities for observation in order to help others perform successfully and develop skills; encourages questions to ensure understanding; observes progress, judges the effectiveness of reports, and provides timely and appropriate feedback on progress

LOW SCORES	HIGH SCORES
▪ Can be tempted to take over for the individual rather than stand back and function as a final safety net (let them learn from their mistakes) ▪ May focus on tracking administrative or procedural issues at the expense of taking time to mentor others ▪ May not feel comfortable evaluating reports' performance and providing suggestions for improvement or alternate approaches	▪ Commits to conducting regular instructional exercises ▪ Keeps focus on coaching and support to increase the level of expertise of the report, relegating own administrative or procedural tasks to a lower priority ▪ Uses demonstrations to model effective techniques for less experienced individuals ▪ Regularly observes others in action to offer suggestions and feedback for skill development

Lower scores may indicate:

▪ A strong preference for making solo calls or a difficulty playing a supporting role in the sales process

▪ A tendency to place a higher priority on the administrative and procedural aspects of the sales management job

Leverages Expertise to be Recognized as Subject Matter Expert

Develops a comprehensive knowledge of products and potential applications; understands that up-to-date knowledge is required to maintain credibility as a subject matter expert with distributors and end-users; acquires knowledge through sources of published information supplemented with personal internal and industry contacts; keeps current on product/service developments through more formal learning opportunities; assumes the role of resident expert and develops product knowledge for the purpose of serving as a resource to others

LOW SCORES	HIGH SCORES
▪ Prefers to focus on the big picture and may not develop an awareness of product modifications at a more detailed level	▪ Acquires the comprehensive knowledge of products and product sales strategies required to keep on target with customer needs
▪ Thinks they can stay ahead of the customer with only a superficial understanding of products and applications	▪ Confident enough in expertise to establish themselves as an effective resource
▪ Believes that most recent developments are cosmetic and do not require in-depth investigation	▪ Believes that there is always something new to learn
▪ Embarrassed to admit when they do not know something, and will not feel comfortable asking for help or seeking the appropriate resources	▪ Recognizes that their credibility as a resource to customers is dependent upon the frequency and thoroughness with which product and applications knowledge is updated
▪ Discounts study and training opportunities as an inefficient use of time and resources	▪ Seeks or maximizes appropriate educational materials that will help them to stay on top of the job
	▪ Takes advantage of formal training opportunities that offer current product information
	▪ Utilizes the expertise of manufacturing resources as well as the input of end users to enhance existing product knowledge

Lower scores may indicate:

▪ A tendency to rely on an overview of the information and remain a big-picture person

▪ A belief that recent developments are only cosmetic and don't require in-depth investigation

▪ A tendency to think that a superficial understanding of products and applications will be enough to meet the customer's requirements