



The Talent Audit System

A single, objective tool that provides an ongoing profile and skills library to assist with talent alignment, development, selection, restructuring and succession planning.



Talent Analytics at Your Fingertips

Objective ... Predictive ... Real-Time ...

Most organizations have identified Sales Talent Management as a strategic priority. However, the methods they use to evaluate salespeople are typically flawed. Making effective decisions about Sales Talent Management is nearly impossible when relying on methods that are subjective, inconsistent, not tailored to specific job skills, or because the results are not meaningful enough to support objective and accurate decision making.

Your Organization's Sales Skill "DNA" At A Glance

The Talent Audit System provides access to skill comparisons and overall success potentials with the predictive accuracy similar to the way a DNA strand identifies genetic makeup of each salesperson.

In this manner organizations are able to inventory a complete list of strengths and development needs for all sales representatives across every sales position, with every team, or across the whole organization. And, once you implement the initial Talent Audit System, Chally will work with you to update the data with information on new hires, promotions, new profiles, derailers and any other employee changes and needs of your sales organization.

In addition, the Talent Audit System allows you to assess new employees and add them to the database to ensure the data remains current and can be regularly updated.

The Talent Audit System results are used for a broad range of sales functions and levels to guide decision making. Common applications include:

Sales Leader

Identify incumbent salespeople most adept at developing new business ("hunters") versus those best suited to managing existing customer relationships ("farmers"), handling Strategic Accounts, developing into a sales subject matter expert, or any of other key sales roles that Chally's World Class Sales Benchmarking Research has identified. Determine which salespeople have the predictive skill strengths required to succeed in a sales management role.

Executive or Leadership

Apply accurate, predictive, "job skill DNA" insights to the consideration of strategic initiatives that have top- and bottom-line impact, such as increasing market share, penetrating new markets, increasing productivity, launching new products, reorganizations and mergers. Strategically align your sales strengths to achieve organizational needs and objectives. Increase the ability to make more objective decisions, with the confidence of knowing those decisions are based on predictive criteria.

Why Do You Need The Talent Audit System?

When you are:

- Setting up a high potential program for sales Management
- Involved in a succession planning program
- Implementing a new sales strategy
- Restructuring your sales team
- In a downsizing mode or looking to re-deploy resources

When you need to know:

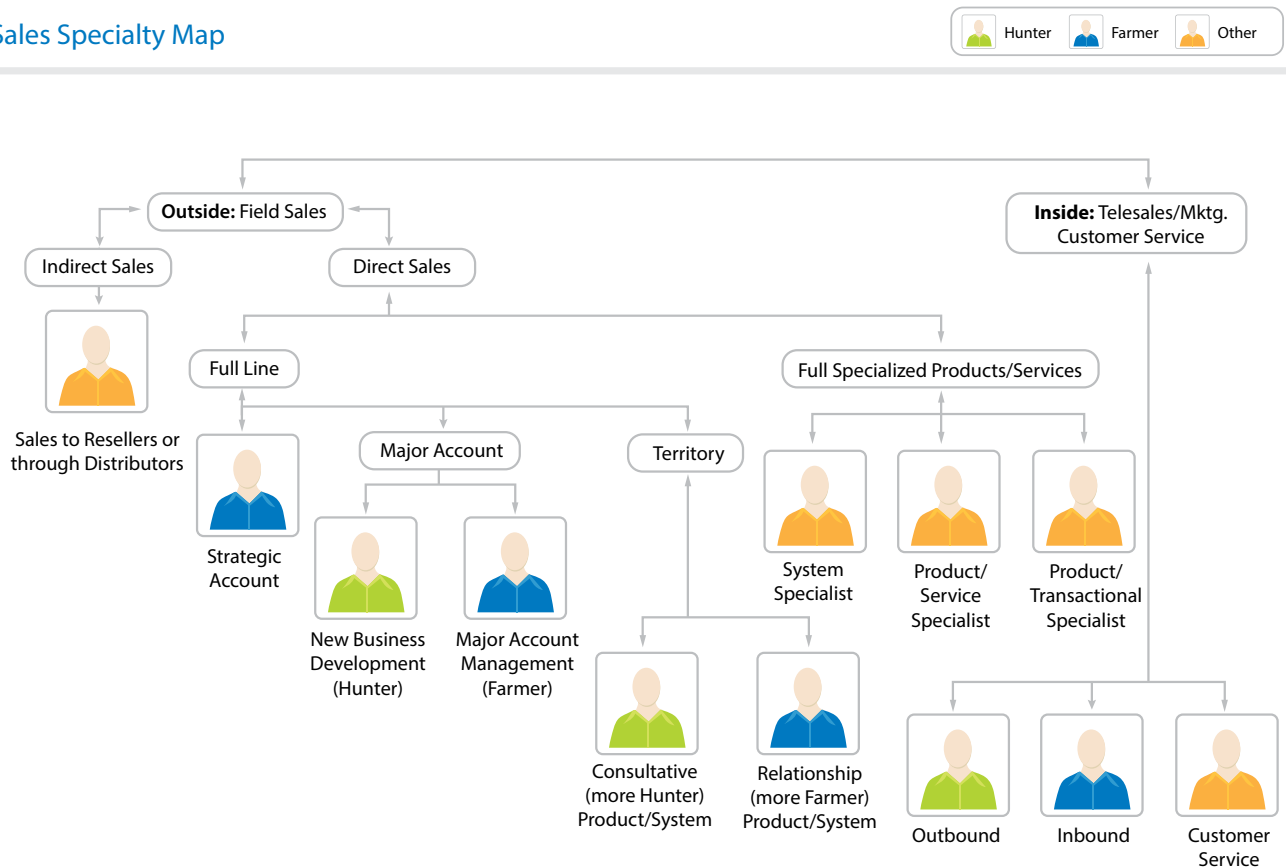
- Who has the best potential to fill critical open sales positions?
- What sales talent do I have?
- What training and development will have the most impact in developing my key sales talent?
- What support will my salespeople need to succeed?
- Who are my future sales managers and what development will they need?
- Whom should I select for my next sales job opening?

The First Critical Step:

How to Specialize Your Sales Force to Meet Company Objectives

Companies emphasizing growth and specific business initiatives often find it appropriate to segment sales activities beyond recognizing the four broad segments of customers. Extensive Chally research of more specialized sales forces has identified **14 specific sets of sales and service skills** that are required to succeed in specialized sales roles. The sales specialist “map” below demonstrates a decision tree that allows a sales executive to identify the one unique profile best suited to accomplish a specialized sales initiative.

Sales Specialty Map



Chris Sena | Cardinal Health

“Chally has been an agile and responsive partner for us throughout our Sales Transformation process. Chally expertly helped our organization define and align customer-centric job competencies with our selection, coaching and employee development processes. A great value for our investment.”

Chris Sena - Vice President, HR

Cardinal Health - Nuclear Pharmacy Services



The Talent Audit

The following pages illustrate the unique features of the Sales Talent Audit System and how this tool can help you make sales talent decisions that help improve effectiveness, reduce turnover and ultimately increase revenue.

Dbt Click To	Dbt Click To	Dbt Click To	Dbt Click
ACCOUNT MANAGER "FARMER" OVERALL SUCCESS PROBABILITY	NEW BUSINESS DEVELOPMENT "HUNTER" OVERALL SUCCESS PROBABILITY	TERRITORY CONSULTATIVE SYSTEM SALES "CONSULTATIVE HUNTER" OVERALL SUCCESS PROBABILITY	REGIONAL SALES DIRECTOR OVERALL SUCCESS PROBABILITY

Scoring by position profile to assist in Talent Alignment, Succession Planning and Team Development

Last Name	First Name	Manager	ACCOUNT MANAGER "FARMER" OVERALL SUCCESS PROBABILITY	NEW BUSINESS DEVELOPMENT "HUNTER" OVERALL SUCCESS PROBABILITY	TERRITORY CONSULTATIVE SYSTEM SALES "CONSULTATIVE HUNTER" OVERALL SUCCESS PROBABILITY	REGIONAL SALES DIRECTOR OVERALL SUCCESS PROBABILITY
BLACK	JERRY	Wilson	56	51	65	63
PETERS	LISA	Wilson	65	49	53	78
BACON	REBECCA	Parker	74	41	51	52
KLINGER	KENNY	Parker	59	59	54	59
LAWSON	JOHN	Wilson	73	55	51	67
DAVIS	SCOTT	Wilson	46	67	40	34
DICKERSON	STEVE	Brown	69	61	61	51
GOMEZ	JILL	Brown	54	53	59	62
KENT	CLARK	Brown	61	58	60	57
MILLER	LINDA	Brown	65	52	68	75
KENNEDY	DAVE	Parker	50	63	36	49
MARTIN	LYNNE	Brown	46	58	44	46
PUCKETT	BILL	Parker	46	68	41	47
BURNS	BILL	Wilson	62	69	50	32
AGNEW	FRANK	Wilson	61	51	47	77
ROBERTS	MARK	Wilson	56	57	51	43

Probability of success by individual Profiles / Scores

Listing of Sales Representatives on a specific team who have taken the Chally Assessment.

Average	59	57	52	56
Count	16	16	16	16
Strength	8	8	6	7
Caution	5	10	7	6
Weakness	3	4	9	9

Role Scoring (Percentiles)

High Potential-Natural Fit



100 50

Caution



65 50

* Yellow = Person scored significantly below average (30) on one or more competency.

Low Potential-Not Natural Fit



49 1

Scoring Explanation

- Do not think of school grades where 58=F. This is not a percent correct scoring convention
- Scores are percentiles, so a score of a 58 indicates the person has higher potential than 58% of all others in the database
- A low score does not mean the person is incapable of performing the skill. It means he/she will have a harder time than those who have high scores

Profiles / Roles

Standard Chally profiles or custom to your specific organization

Scoring is matched against as many Client Specific or Chally Tailored sales, sales management or other related profiles to effectively and objectively measure and predict success in each role.

Last Name	First Name	Manager	ACCOUNT MANAGER "FARMER" OVERALL SUCCESS PROBABILITY	NEW BUSINESS DEVELOPMENT "HUNTER" OVERALL SUCCESS PROBABILITY	TERRITORY CONSULTATIVE SYSTEM SALES "CONSULTATIVE HUNTER" OVERALL SUCCESS PROBABILITY	REGIONAL SALES DIRECTOR OVERALL SUCCESS PROBABILITY
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KLINGER	KENNY	Parker	59	59	54	59
LAWSON	JOHN	Wilson	73	55	51	67
DAVIS	SCOTT	Wilson	46	67	40	34
DICKERSON	STEVE	Brown	69	61	61	51
GOMEZ	JILL	Brown	54	53	59	62
KENT	CLARK	Brown	61	58	60	57
MILLER	LINDA	Brown	65	52	68	75
KENNEDY	DAVE	Parker	50	63	38	49
MARTIN	LYNNE	Brown	46	58	44	46
PUCKETT	BILL	Parker	46	58	41	47
BURNS	BILL	Wilson	62	60	50	32
AGNEW	FRANK	Wilson	61	51	47	77
ROBERTS	MARK	Wilson	56	57	38	43
ELLIS	TOM	Brown	69	53	58	76
Average			60	57	52	55
Count			22	22	22	22
Strength			12	8	6	7
Caution			6	10	7	6
Weakness			4	4	9	9

Dbl Click	Dbl Click	Dbl Click	Dbl Click
ACCOUNT MANAGER "FARMER" OVERALL SUCCESS PROBABILITY	NEW BUSINESS DEVELOPMENT "HUNTER" OVERALL SUCCESS PROBABILITY	TERRITORY CONSULTATIVE SYSTEM SALES "CONSULTATIVE HUNTER" OVERALL SUCCESS PROBABILITY	REGIONAL SALES DIRECTOR OVERALL SUCCESS PROBABILITY

Potential by Person by Roles

Ability to measure the person, team, or organization against key profiles and sort/slice/dice on your key data to aid in key talent decisions such as:

- Move person to new role (Example: Farmer to Hunter)
- Succession for Management (Rep to Manager)
- Who can successfully sell new solutions
- Talent alignment/downsizing

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PETERS	LISA	65	49	53	78
BACON	REBECCA	74	41	51	52
KLINGER	KENNY	59	59	54	59
LAWSON	JOHN	73	55	51	67
DAVIS	SCOTT	46	67	40	34
DICKERSON	STEVE	69	61	61	51
GOMEZ	JILL	54	53	59	62

Scoring by Competency to Assist in Development Planning

Saves Training Dollars by Pinpointing Exactly Who Needs Training on What Competency

An expanded view of competencies within a profile will quickly identify areas of strengths and developmental opportunities by individual or by team.

Profile Expands on click to reveal competencies within that specific profile

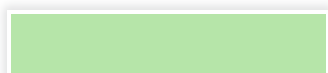
Territory Consultative System Sales profile expanded to reveal scoring by competency. Average overall success probability for each competency within Territory Consultative System Sales profile

		DbI Click	DbI Click To Close						DbI Click
Last Name	First Name	NEW BUSINESS DEVELOPMENT "HUNTER" OVERALL SUCCESS PROBABILITY	DEVELOPS SALES LEADS	QUALIFIES PROSPECTS WITH STANDARD PROBES	MAKES PERSUASIVE PRESENTATIONS	COMMITTS TIME AND EFFORT TO ENSURE SUCCESS	MAXIMIZES RESULTS BY PARTNERING AS A CUSTOMER ADVOCATE	ADAPTS APPROACH TO DIFFERENT BUYER MOTIVATIONS	TERRITORY CONSULTATIVE SYSTEM SALES "CONSULTATIVE HUNTER" OVERALL SUCCESS PROBABILITY
BLACK	JERRY	51	37	91	53	67	65	78	65
PETERS	LISA	49	62	19	31	48	74	84	53
BACON	REBECCA	41	82	28	41	31	40	82	51
KLINGER	KENNY	59	74	23	43	40	69	73	54
LAWSON	JOHN	55	87	28	41	31	37	84	51
DAVIS	SCOTT	67	46	25	48	1	46	73	40
Average		54	65	36	43	41	55	79	38
Count		6	6	6	6	6	6	6	6
Strength		2							1
Caution		2							4
Weakness		2							1

Overall average success probability for Territory Consultative System Sales

Skill Scoring

High Potential-Natural



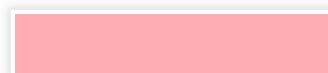
100 50

Caution



49 40

Low Potential-Not Natural



39 1



What is Included in the Talent Audit System?

The Talent Audit System is a comprehensive solution that includes a complete set of tools to effectively aid in your talent management efforts. The Talent Audit System deliverables include:

Enhanced Talent Audit

- Assessment for individuals matched against existing Chally profiles.
- Assessment results scoring data downloaded into an electronic aggregate report.
- Individual reports by participant (manager and employee) for reviewing and development discussions.

Talent Audit Update

One Talent Audit electronic report update to include data from the additional assessments, plus clean-up of data due to terminations, transfers, etc.

Additional Assessments for NEW Participants

Assessments for additional people (new hires, new positions, transfers) with individual reports. The number of additional assessments allotted is 20% of the number of participants in the initial Talent Audit.

Jeff Patton, Group Manager | Verizon

"We performed the Talent Audit because we had a team who was new to the region and we had no idea what their skill sets were. We ran their scores against several competencies and were able to create individual course curriculums to address areas where they scored high and low. This became part of an accreditation program where they are completing courses to develop their specific skill sets to be a successful manager in the field. There are a lot of assessment companies out there but all of them failed

to provide an aggregate report like Chally does. Chally's individual reports were also amazing. We appreciated the coaching tips which allowed the supervisors to work with the individuals on specific development opportunities."

Jeff Patton, Group Manager

Sales Performance and Leadership Development

Verizon



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