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Personal & Confidential

January 21, 2009

The Receiver
Your Company
P.O. Box 1234
Anycity, USA 40000-1234

Candidate: John Smith
Position: Account Management
Bottom-Line: Recommended

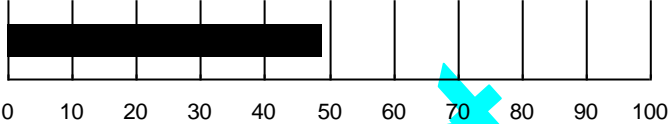
The validity scales from the Self-Descriptive Index indicate that Mr. Smith went out of his way to represent himself as truthfully as possible. As a consequence, the following profile results are an accurate description of his work approach and motivational needs.

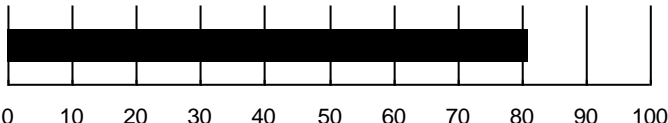
Summary of Candidate's Critical Selling Skills Potential

According to Chally's analysis of Your Company position information, we have agreed that the following Sales Skills are most critical to success in this position:

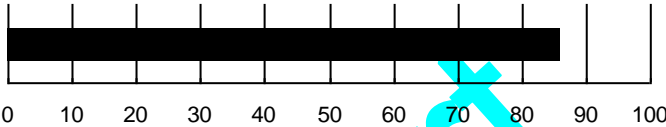
Agreed-Upon Skills	Candidate Score
MAXIMIZES RESULTS BY SYSTEMATICALLY MANAGING AN ACCOUNT PLAN	49%
DRIVEN TO PRODUCE BY INCREASING SALES TO EXISTING ACCOUNTS	81%
WORKS THE SYSTEM FOR THE CUSTOMER	86%
EDUCATES CUSTOMERS THROUGH STRUCTURED TRAINING	75%
PROMOTES CUSTOMER RELATIONS BY SOLICITING FEEDBACK	90%
RESPONDS AT ANY HOUR	38%

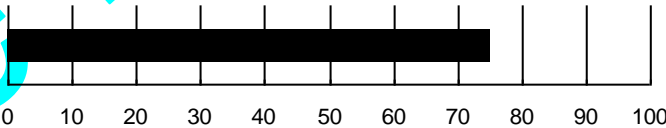
In-Depth Evaluation of Critical Account Management Skills Potential

MAXIMIZES RESULTS BY SYSTEMATICALLY MANAGING AN ACCOUNT PLAN	SCORE	
<p>Consistently meets or exceeds sales targets through personally controlling the critical aspects of the sales and delivery 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</p>	49%	
<p>Skill/Capability Level: Mr. Smith may not see the need to commit to a higher level of personal control or dedication because he is content being an average producer. He may see no need to change the way in which he manages the sales and delivery process because he believes his results are perfectly acceptable. He might have a preference for loosely organizing account management work and remaining reactive, rather than proactive, to customer and internal demand for information and response. He might not create a viable system for handling key tasks or monitoring for potential problems. So, he could be blindsided by an obstacle that could affect the success of his plans. He may not take the time to listen to the customer's needs and concerns and may not go the extra mile to ensure that those needs are met. He may not do whatever he can to guarantee satisfaction.</p> <p>Coaching Suggestions: Compare Mr. Smith's position in the performance chart to that of others. Analyze where he falls short and how he can improve his results. Is he taking control of the key aspects of the sales and delivery process? Or is he letting them fall by the wayside? Is he dedicated and committed to meeting or exceeding sales results? Or is he too laid back and relaxed? Challenge him to change the old patterns of behavior that are a hindrance to him achieving a high level of success. Remind him of the importance of implementing a system to manage accounts in order to ensure that key tasks are accomplished and to avoid barriers to ongoing success. Assuming that things will work out on their own, rather than working to guarantee that they do, is asking for trouble. Waiting until a problem surfaces is costly in the long run - not just in the area of customer satisfaction, but also the resources wasted to rectify a situation that could have been prevented. Remind him that making the customer feel as though they are valued is essential to his success. If a customer is dissatisfied with the service they are receiving, they will complain and possibly take their business elsewhere. With this in mind, it makes sense to take the time to listen to his customer's needs and concerns and then do whatever he can to ensure that they are met.</p>		

DRIVEN TO PRODUCE BY INCREASING SALES TO EXISTING ACCOUNTS	SCORE	
<p>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</p>	81%	
<p>Skill/Capability Level: Mr. Smith has a strong desire to succeed in sales and achieves that goal by finding avenues to generate increased sales from established accounts. He understands that a new level of results</p>		

achievement can be reached by maximizing sales to the existing customer base. He is motivated to advance in a sales career by increasing the product diversity offered to existing accounts. He is creative and innovative in his approach to introducing additional products that might interest his customers.

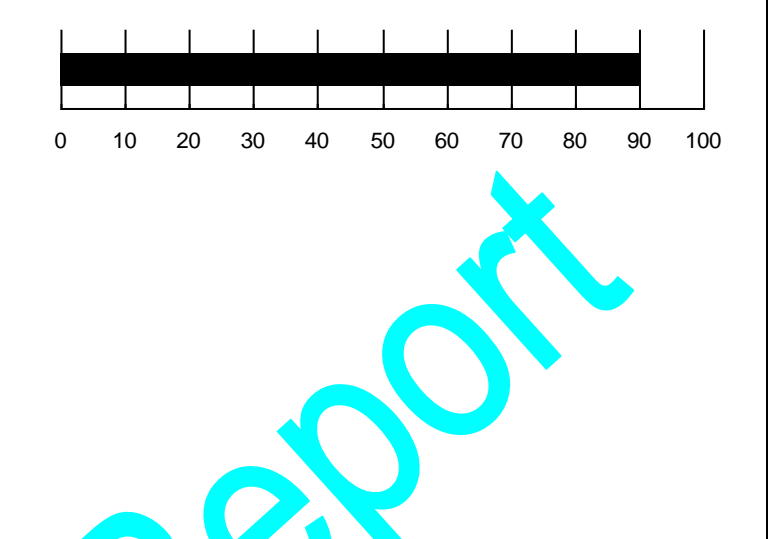
WORKS THE SYSTEM FOR THE CUSTOMER	SCORE	
Shows skill and ease at working in groups; works with others to achieve better results and forges close working relationships and alliances in order to get things done; is quick to cooperate versus expect others to bend to his wishes; supports joint ownership and shared recognition for results; recognizes the advantages of group participation in planning and problem solving	86%	
<p>Skill/Capability Level: When striving to accomplish a goal or task, Mr. Smith effectively collaborates with co-workers, management and other departments. He recognizes the advantages of group participation in planning and problem-solving.</p>		

EDUCATES CUSTOMERS THROUGH STRUCTURED TRAINING	SCORE	
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	75%	
<p>Skill/Capability Level: Mr. Smith modifies his group presentations to include recent information that could maximize the benefits his customers will receive from his products and services. He is comfortable teaching in a setting that provides structure, and he will revise his training so that both new and previously accepted ideas are included. He does not waste time with lavish presentations but focuses on improving those competencies that will be most helpful in maximizing customer benefits. He understands the need to make his audience want to learn, but does not sacrifice content for style.</p>		

PROMOTES CUSTOMER RELATIONS BY SOLICITING FEEDBACK	SCORE	
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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 to the customer; ensures future business by anticipating and removing potential sources of dissatisfaction

90%

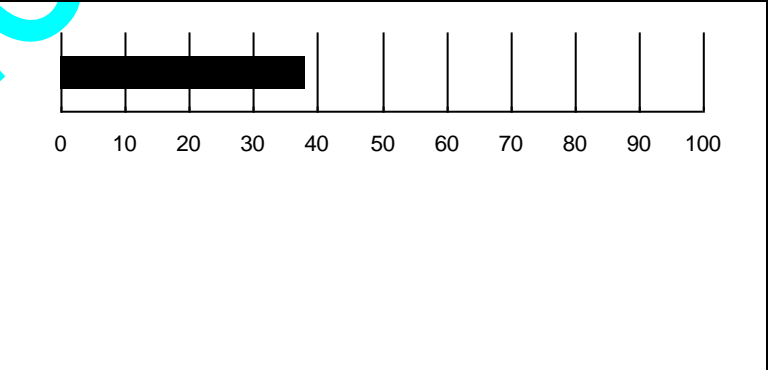


Skill/Capability Level: Mr. Smith demonstrates continued personal attention to his customers, and regularly solicits feedback and suggestions for improvement. He does his best to prevent small frustrations from building to become more serious issues. He stays logical, objective, and focused on finding ways to bolster customer satisfaction rather than becoming defensive or expressing frustration to customers. He keeps his emotions in check and does not allow his personal feelings to interfere with the contact.

RESPONDS AT ANY HOUR	SCORE	
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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

38%

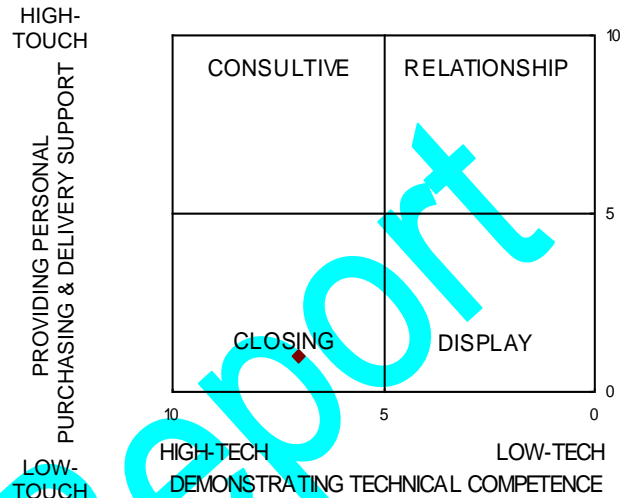


Skill/Capability Level: Mr. Smith may not identify being successful in his career as being successful in life and, thus, may seek a more balanced approach to work. He may be unwilling to compromise his personal time to attend to client needs and, as a result, could fail to provide support when faced with after-hours customer issues which require his involvement. Should he be unavailable when a customer is in need of support, he might not have a back-up person informed and ready to help. He may fail to establish a system to provide assistance in his absence, and consequently clients could become frustrated when their issues cannot be quickly resolved.

Coaching Suggestions: Since the workload in Mr. Smith's position can vary, caution him to be aware of times when he will be called to work more than his regular hours. By juggling his priorities differently and more efficiently organizing his time, he should be able to limit the number of extra hours required. If he is having difficulty balancing his time, help him to develop efficient methods for ordinary tasks, and a Plan B for when extra work comes his way. Require Mr. Smith to provide you with a list of who in his department would be able to answer questions and solve problems from his customers when he is unavailable. This back-up person needs to be prepared with up-to-date customer information and the knowledge of where to find answers. Make sure that this is straightened out before there is a customer in need in order to avoid the panic and mistakes that can accompany a hurried decision.

Candidate's Preferred Sales Style

The Sales Skills Profile describes Mr. Smith as a closing salesperson. He bases his sales on a conceptual overview and brings enthusiasm and excitement into his presentations. His preference is for a fairly short sales path.



Key Motivational Characteristics

The motivational characteristics described below measure Mr. Smith's preferences, wants, or desires. However, they DO NOT necessarily indicate that he currently has developed the habits or skills to satisfy them entirely on his own. A manager may wish to note these specific motivational needs and utilize the suggested tips to enhance Mr. Smith's potential.

Motivational Characteristics	Manager's Tips
He likes to make sure his actions will not have a negative impact on people. He prefers to think interpersonal challenges out on his own, and tends to stay out of affairs he doesn't consider to be his business.	Because he avoids involving himself in interpersonal matters which he does not feel are his concern, he may occasionally appear to be hard to read. Counsel him when to try to make some one-on-one contacts to establish and then maintain interpersonal relationships.
He is uncomfortable wasting time or being inactive. He will focus on achieving goals and will seek quantifiable results so he can measure his success. He prefers to keep working even on tasks that others might consider busy work.	Help him understand overall project goals, target dates, and expected results. Provide him with ways to keep track of and measure his accomplishments. He will be particularly satisfied by his own quantitative achievements.
He enjoys visibility but, when it puts him in a position of conflict, his initial preference is to retreat, but not to change his mind. If he feels backed into a corner, it may lead him to overreact. This could cause him some frustration if he is unable to sustain his prominence without confrontation.	He may need to develop a more direct approach to be able to handle confrontation or difficult situations. Consider a negotiation or conflict management program for him.
His personal interactions will be functional and to the point, minimizing what he may see as unnecessary chitchat. He prefers his social contacts to be with people who share his interests or have common needs or goals.	Help him to develop a system to consistently follow up on the interpersonal niceties that many people value, even though he may have little interest in them himself.

Motivational Characteristics	Manager's Tips
In his habits, as developed over time, he sees himself as a rather shy person who deals best with others on a one-on-one basis.	Participating actively in a service organization can give Mr. Smith valuable experience in social interaction. He might also consider membership in a group such as Toastmasters which would place him in a social situation in a non-threatening atmosphere.
Mr. Smith may concede some challenges too easily. Failing to prepare a work schedule, because he doesn't believe he can do so effectively, and then hurrying to get things done, will create unnecessary pressure for him.	Assertiveness training would help him learn to express his true needs. Failing to speak up when he is not getting what he wants can cause him to turn stress inward. Develop alternative options to force him to prepare for the situations and potential pressures ahead. This may relieve one cause of stress--the last-minute rush to complete the job.
He is confident that he can complete his responsibilities. He also feels content with his current level of personal achievement and is not motivated to make any dramatic efforts to improve on his abilities.	He may not believe he can benefit from constructive criticism, and may redefine his personal goals rather than admit failure. Encourage him to learn from mistakes rather than getting defensive about them.

We hope this information has been useful. These questionnaires were developed carefully and represent a modern, scientific method of assessment. The results should be used as a significant tool in the decision process in conjunction with interviewing, background data, and other tools. Where profile information contradicts other sources, neither the profile nor the other sources should be automatically relied on without further investigation. This assessment is valid only for the position noted.

Sample Report