



Skills & Capabilities Assessments

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Competency Measurement, Development
& Planning Tools

"In order to successfully realign our retail banking sales force, we needed to know that we were putting the right people into the right roles. We needed to match employee capabilities with client needs. Skills & Capabilities Assessments helped us do just that."

WHAT ARE Skills & Capabilities Assessments?

As specialists in sales, organizational and learning effectiveness, we are breaking new ground in competency assessment and development. **Skills & Capabilities Assessments** are the result of more than 20 years of research and application of sales, learning, decision and business principles by sales.org founder Geoff Davidson. More than the work of one person, **Skills & Capabilities Assessments** are the product of working with leading experts to apply breakthrough learning in the development of measurable, results-oriented performance tools for some of Canada's leading financial services companies.

We take a refreshingly pragmatic approach to help you assess your people's ability to apply key skills and capabilities – those competencies that have been clearly linked to your business performance. We answer the questions, "Will their actions result in:

- ☐ Adding new business or customers?
- ☐ Increasing your profitability?
- ☐ Adding value to customer relationships?
- ☐ Meeting or compromising legal, compliance or regulatory requirements?"
- ☐ Losing existing business or customers?
- ☐ Placing your business or employee at risk?
- ☐ Placing your customer at risk?

Obviously, the results will tell you how suitable an individual is for a given role. But we don't stop there. The assessments feed individualized action plans that help you quickly develop your people in the areas that will pay the biggest dividends to your business. Strategically, **Skills & Capabilities Assessments** can be integrated with your on-going performance management, succession planning, career development, training and accreditation programs. And finally, when you use them in conjunction with psychometric testing and behavior-based interviewing, you can make critical hiring and promotion decisions with much greater confidence – knowing that you will invest your time and resources in the right people and bring them up to speed quickly.

HOW CAN YOU BENEFIT FROM Skills & Capabilities Assessments?

- ☐ Make better selection decisions for hiring new people as well as promoting current employees. Redeploy your people quickly to respond to market needs.
- ☐ Accelerate individual development by giving both the individual and the manager a tool that helps them quickly focus on high priority competencies.
- ☐ Improve performance management by establishing performance benchmarks for critical roles and baseline performance for each individual. Revisit the benchmarks and reassess performance annually.
- ☐ Make succession planning more practical and meaningful by identifying gaps in your talent pool. Identify high potential internal candidates and make informed decisions about when to go outside the organization.
- ☐ Focus your recruiting efforts and pre-screen candidates against the requirements of the role.
- ☐ Quickly assess the talent pool in merger or acquisition situations.
- ☐ Maximize the ROI of your existing training programs.
- ☐ Minimize potential compliance-related risks by identifying key skills or knowledge gaps and putting plans in place to close them.

"...the proper selection, placement and development of people requires three data points to make decisions with confidence: (1) Are they likely to do the job? (2) Can they do the job? (3) Have they done the job?... When you combine the results of psychometric assessment, competency assessment and performance assessment, well-informed resourcing decisions can be made. If the results are consistent, you can proceed with a high degree of confidence that you are investing in the right people."

– Norm Trainor in Canadian HR Reporter, August 10, 1998

How do Skills & Capabilities Assessments work?

Skills & Capabilities Assessments are customized to meet your specific role requirements and to fit the “language” of your business. We use a combination of testing methods to measure the job-related competencies that have been identified as critical to the role in question. In addition to assessing specific skills and capabilities, questions and custom-tailored situations evaluate the individual’s ability to *apply* the skills and capabilities, in combination, in the types of situations that are most common to the role.

For example, our standard management assessment evaluates individuals on the categories of:

- ☐ Relationship & Trust Building
- ☐ Recruiting & Development
- ☐ Business Analysis & Planning
- ☐ Listening
- ☐ Coaching
- ☐ Questioning
- ☐ Leadership
- ☐ Customer Service
- ☐ Computation

This approach is designed to validate the individual’s self-evaluation, point out areas of overconfidence and indicate prioritized performance improvement opportunities.

What reports are produced?

Skills & Capabilities Assessments produce two individualized reports for each person assessed. Additional customized reports may be produced to meet your specific requirements.

The Assessment Summary shows the level of proficiency demonstrated in each competency category evaluated. It then provides an evaluation of the individual’s overall level of competency relative to pre-defined performance benchmarks for the role in question.

Professional Sales Skills & Capabilities Assessments

Leslie Hawking

This Assessment samples your general skills to analyze, recognize, and utilize a selected set of common elementary practices, opportunities, and issues you may encounter on the job. It is designed to assess your knowledge, skills, and abilities.

Use the following score reports to guide your development planning. In general, scores are given Professional Sales Skills.

SKILL & CAPABILITY	YOUR SCORE	BENCHMARK COMPETENCY
Listening	Consistent with	Consistent with
Questioning	Consistent with	Consistent with
Relationship Building	Consistent with	Consistent with
Competency Assessment	Consistent with	Consistent with

This score is a summary of your performance on this assessment. It is based on the scores you received on the individual competency assessments. It is not a measure of your overall performance. It is a summary of your performance on this assessment.

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SMART ACTION PLANNER

Leslie Hawking

SPECIFIC

- 1. Analyze customer needs and requirements to develop a sales plan.
- 2. Analyze customer needs and requirements to develop a sales plan.
- 3. Analyze customer needs and requirements to develop a sales plan.

MEASURABLE

- 1. Analyze customer needs and requirements to develop a sales plan.
- 2. Analyze customer needs and requirements to develop a sales plan.
- 3. Analyze customer needs and requirements to develop a sales plan.

ACTIONABLE

- 1. Analyze customer needs and requirements to develop a sales plan.
- 2. Analyze customer needs and requirements to develop a sales plan.
- 3. Analyze customer needs and requirements to develop a sales plan.

REALISTIC

- 1. Analyze customer needs and requirements to develop a sales plan.
- 2. Analyze customer needs and requirements to develop a sales plan.
- 3. Analyze customer needs and requirements to develop a sales plan.

TIME BOUND

- 1. Analyze customer needs and requirements to develop a sales plan.
- 2. Analyze customer needs and requirements to develop a sales plan.
- 3. Analyze customer needs and requirements to develop a sales plan.

QUESTIONS: 1. How many sales calls per week? 2. How many sales calls per week? 3. How many sales calls per week?

The **SMART Action Planner** is a six-week development plan which targets the area where the greatest opportunity for performance improvement has been identified. This puts a practical tool into the hands of both individuals and their managers – a tool that is fully integrated with your existing learning programs.

The **SMART Action Planner** directs the individual to the appropriate learning programs, support materials and customer-centered activities – the ones that will quickly lead to both improved capabilities and increased productivity. (SMART is an acronym for planning which is Specific, Measurable, Actionable, Realistic, and Timebound).

“In order to respond to the changing needs of our customers, we were faced with a requirement to realign and accelerate the development of our sales force. We needed a tool that would help us assess our employees in a way that enabled us to match the right person to the right role. Self assessment wasn't enough – the tool had to test the person's ability to apply the skills and capabilities in real life situations. We needed to identify people's strengths and developmental needs, and where skill gaps or overconfidence could put our customers or us at risk.

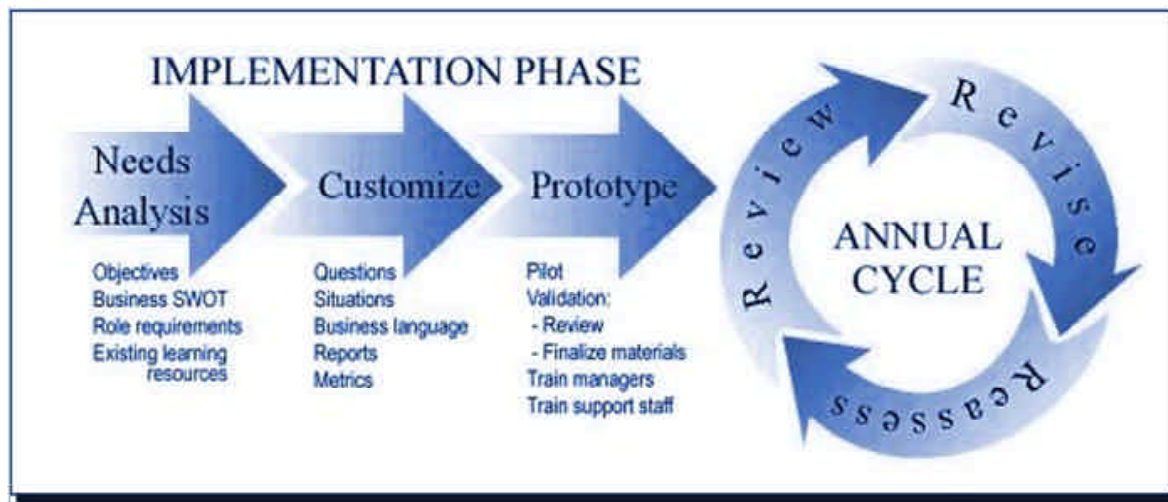
The tool had to integrate with and enhance our career planning and development process. We also had to make sure that it would build on the large investment that CIBC has already made in competency modeling. More than a one-time assessment, we wanted to give our people something that they could see really brings value to their continuous development and career advancement potential.”

– Stoney Kudel, CIBC

HOW ARE Skills & Capabilities Assessments IMPLEMENTED?

Skills & Capabilities Assessments offer companies a wide range of support. The most successful implementations have been for companies that introduce competency testing into the recruiting and selection process. From there it is a natural process to begin adding customized role and responsibility assessments, aligning those results to individual and organizational development programs, and the continuous measurement, management and improvement of on the job competencies.

As customized role and responsibility Skills & Capabilities Assessments are tailored to your specific environment and requirements, each implementation is different. A typical custom implementation process starts with Needs Analysis, Customize and Prototype phases, leading to an ongoing commitment to measure, manage and increase personal and organizational performances:



ARE Skills & Capabilities Assessments FOR YOU?

- ☐ Are you looking for ways to increase your client base, and the number and size of sales being made?
- ☐ Are you looking for ways to improve customer satisfaction, and retain and build on existing business?
- ☐ Do you want to increase revenues, reduce costs and improve productivity?
- ☐ Do you know the status of your talent pool well enough to make succession planning meaningful?
- ☐ Are you hiring and promoting the right people consistently?
- ☐ Does the total cost of hiring new people and bringing them up to speed represent a significant investment?
- ☐ Do you want to measure individual performance and identify the best opportunities for immediate improvement?
- ☐ Is it important to measure and manage performance activities that may place your customers or company at risk?
- ☐ Do you want to focus your people on developing the skills and capabilities that you know impact your bottom line?
- ☐ Have you purchased learning programs in the past that have not delivered the expected results?
- ☐ Do you want to increase the ROI of your existing training programs?

At sales.org Inc., we inspire and enable our clients to achieve continuous and sustainable performance improvement by helping them to identify and develop the right people for the right roles at the right time - people doing the right things and working toward the right results. We accomplish this by creating and delivering world-class tools for the assessment and development of skills, capabilities and competencies.

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