



**Sales Education
Foundation**

**Elevating the Sales Profession
Through University Education.**

Chally University Certification

- 288 item assessment, no matter the position
 - Available in over 20 languages, questions modified for cultural differences (follow up materials only available in English)
 - Does not have to be taken in a controlled environment*
 - Takes 45-60 minutes to complete (not timed)
 - Yes/no and multiple choice questions (not face valid)
 - Self-descriptive index - motivation analysis - sales orientation
 - Measures the candidate's potential on-the-job behaviors
 - Measures the candidate's most distinctive (or driving) motivations and work habits
- *The Chally can be taken via tablet or mobile device

Position Explanation

Though Chally has over a dozen sales profiles, the feedback provided on university reports includes the following six common profiles:

NEW BUSINESS DEVELOPMENT (HUNTER)

WHAT IT IS	WHAT IT ISN'T
<ul style="list-style-type: none">• Almost exclusively sells to new customers or dormant existing relationships• Not responsible for ongoing client contact after the sale• Rain-maker for new product introduction• Sales cycle is typically 3 months or less, but can extend to 6 months for complex deals	<ul style="list-style-type: none">• Builds a book of customers and then services them to maintain and increase revenue from them• Territorial sales role to deal with mid and small customers• A "closer" whose only function is to seal the deal

This position is usually responsible for bringing in new business from larger accounts. Those who excel tend to be comfortable uncovering opportunities and continuously promoting their benefits in the hopes of uncovering a match. The position focuses almost exclusively on the prospect conversion process, and the salesperson typically does minimal post-sale contact. This type of position is used to develop a presence in a competitive stronghold or to expand sales coverage beyond the firm's current customer base.

ACCOUNT MANAGEMENT (FARMER)

WHAT IT IS	WHAT IT ISN'T
<ul style="list-style-type: none">• Almost exclusively sells to an existing book of customers with the expectation of growing share of wallet – may engage in cross-selling• Role that develops deep and broad relationships within the customer• Strong customer advocate within the seller's organization and does proactive planning• Sales cycle is ongoing with annual purchase agreements possible for the larger accounts• Strong focus on quality of personal service to the client	<ul style="list-style-type: none">• Fast expansion of sales through active prospecting outside of the current customer base• Territorial sales to small and medium-size customers• Reactive and content to keep existing customers at current usage levels

This position is responsible for optimizing sales in an existing set of major accounts. This is usually accomplished by increasing the seller's share of current purchases as well as expanding sales both by line extension and penetrating additional buyers within the accounts. This type of sales is proactive in strengthening customer relations and focuses on continually growing revenue by meeting customer needs and making it easy to do business with the seller.

INDIRECT SALES (DISTRIBUTION SALES)

WHAT IT IS	WHAT IT ISN'T
<ul style="list-style-type: none">• Quasi sales management role with no authority• Teaches and excites channel salespeople• Regular, repeated contact	<ul style="list-style-type: none">• Closer that uses channel as lead generators• A salesperson with a "scripted" sales pitch that is standard for all customers• Reactive contact only when asked

This position sells to end users through a distribution network of distributors, agents, or manufacturer's representatives. Typically, the seller has little direct authority over the sales forces. As a result, it is the responsibility of the seller's salesperson to train and motivate its distribution partners, often through joint calls, promotions, or special bonuses.

Top indirect salespeople are adept at capturing "share of mind" throughout the channel and helping their agents sell effectively and thus, become more personally successful. They tend to develop extensive product and application knowledge so they can be a useful resource in developing individual salespeople and educating end users when appropriate. They meet consistently to train and inspire their agents. They act as a resource to individual salespeople to model techniques and/or help close the tough or large deals.

TERRITORY CONSULTIVE SYSTEM SALES

WHAT IT IS	WHAT IT ISN'T
<ul style="list-style-type: none">Responsible for maximizing sales within a territory by finding new customers and servicing existing customers; usually 70/30 ratio of new to existing businessSales cycle is 6 months to 1 year	<ul style="list-style-type: none">Selling systems that are familiar to the organization and require little customization to gain the maximum benefit

This position covers a territory and sells the full array of its business unit's product offerings. The salesperson is responsible for acquiring new customers as well as servicing existing ones. New business development is usually a large component of quota attainment chiefly because the salesperson has support from others within the seller's organization to provide ongoing service to the existing customer base. The salesperson's chief responsibility is to help configure the appropriate product offering from the array of options to produce the system with the most relevant benefit package to meet customer needs. The system is usually sold as a turnkey with implementation the responsibility of the seller. These sales are typically to buyers with little previous experience with the product offering so they need orientation and support to gain the maximum benefit.

TERRITORY RELATIONSHIP PRODUCT SALES

WHAT IT IS	WHAT IT ISN'T
<ul style="list-style-type: none">Responsible for maximizing sales within a territory by finding new customers and servicing existing customers; usually 20/80 ratio of new to existing businessSelling products that are familiar to the organization and require little customization beyond choosing from a standard group of features and optionsLikely to be replacing consumed product and introducing substitutes where appropriate	<ul style="list-style-type: none">Selling products that require a significant amount of customization and training beyond the "standard" options or specifications to receive the desired benefit

This position covers a territory and sells the full array of its business unit's product offerings. The salesperson is responsible for acquiring new customers as well as servicing existing ones. The emphasis is on maintaining and growing sales within existing accounts. New business development activities are low key and meant to at least replace the natural attrition of customers that are lost. The salesperson sells products and consumables associated with them to buyers who are reasonably expert at using them and deriving the maximum benefit from them. The salesperson's major role is to work as an advocate to make it easy to do business with his/her organization, solve problems, and to actively work at strengthening the customer relationship.

SYSTEM SPECIALIST (SUBJECT MATTER EXPERT)

WHAT IT IS	WHAT IT ISN'T
<ul style="list-style-type: none">Responsible for maximizing sales of a specific subset of the systems marketed by the sellerSelling systems that require a significant amount of customization and training to implementProviding extensive technical expertise to configure the system for maximum benefit	<ul style="list-style-type: none">Selling systems that are familiar to the organization and require little customization beyond choosing the relevant components to gain the maximum benefit

This position is responsible for selling a specific system and is not usually bound by territorial constraints. The salesperson is the resident expert and may work as a resource to the existing field organization to penetrate existing customers with the appropriate set of business needs. Likewise, the salesperson may have direct account responsibility for customers and prospects with needs focused on the specific system being sold. The salesperson develops extensive product and market knowledge in order to establish credibility and provide the necessary orientation/training so customers can fully utilize the system they have purchased.

The University Sales Assessment

- Provides students with an overview and personalized scores for 6 common sales roles
- Allows participants to more responsibly navigate the interview process
- Outlines strengths for students to highlight in portfolios and brings to light questions candidates can ask in the job selection process
- Connects students with potential job opportunities from some sales organizations (Candidate Match Program)
- Provides faculty with a tool for use in sales curriculum
- Allows SEF and Chally to give back to the university community in an effort to help professionalize the Sales industry

Bottom-Line Recommendations

- Three Recommendations are provided for students:
 - **Strong Match**=Recommended
 - Adjusted average is 50% or greater and no “Concern” conditions are present
 - **Good (Moderate*) Match**=Recommended with Concerns
 - Adjusted average is 50% to 65% with one or more scores under 30%
 - **Low Match**=Not Recommended
 - Adjusted average of Profile Scales is less than 50%

*Professor’s copy of student results uses the term “Moderate” instead of “Good”

Completing the Assessment

Students' names and email addresses are provided by their professor (Excel spreadsheet is preferred)

- Participating students receive an email from Chally with a link and sign-in credentials (User ID and Password)
- Students click on the link and input their User ID and Password
- Students select “Submit” only when finished
- Results are typically ready within 24 hours. Students receive an email when their results are ready. This email contains a link to the student site, “Get Connected.”
 - Note: this link is different from the one used to take the assessment.

The assessments typically take +/- 60 minutes to complete. Students do not have to complete the assessment in one sitting. They may save their answers and return to the assessment at a later time.