

PERSONNEL
COMPETENCY
ASSESSMENT

CANDIDATE

Mr. John Doe

POSITION

Project Sales Manager

COMPETENCY ASSESSMENT

PROJECT SALES MANAGER

This Competency Report does not intend to make a recommendation about this candidate for selection or termination. It is merely a service which allows more confidence when making a decision of whether to select or terminate this person. Thus, the competencies that this person appears to lack does not necessarily mean that he will not perform well in the job.

ASSESSMENT PROCEDURE

ACCORDING TO THE REQUEST, THE PROJECT MANAGER WAS REQUIRED TO BE ASSESSED AS WELL AS ASKED ABOUT THE NATURE OF THE JOB OF PEOPLE UNDER HIM. In the interest of time, to assess his competencies he was interviewed. He was then asked to sort the Lominger Competency Cards according to what he expected of the sales group under him. The interview took about 45 minutes and the Project Manager sorted the cards for about 50 minutes.

INTERVIEW OBSERVATIONS

The candidate was interviewed about his current job as a Project Manager. He was asked questions based on competencies that the Senior supervisory employee identified as very important for the job of Project Manager. Questions related to team leadership, salesperson performance assessment, and interpersonal relations were asked. Additionally, he was asked specific procedures related to his job highlighting primary tasks and duties.

On the positive side, the candidate was very sure about the job as he is an experienced professional in the field. He exhibited good understanding on the process of selling systems. He was serious about the interview and answered questions carefully with thought. He was modest and very patient throughout the exercise. His explanations of procedural questions were very clear and did not shift off topic.

On the negative side, the candidate was a bit uptight about the motives of the assessment. Although he was not told about his assessment, he showed some suspicion about him being 'tested'. This might have affected some of his responses, which may have been motivated by the image of being acceptable in the eyes of the interviewer as well as his employer.

INTERVIEW RESPONSES TO IMPORTANT COMPETENCIES

The candidate was first asked about what was expected of him in the job of Project Sales Manager. He mentioned that the primary job duties involved heading a team of four Sales Engineers. Questions relating to the following dimensions were posed and following were his main responses:

"Recruitment of salespersons is done by placing an ad in the newspapers on occasion and screening out CVs for the necessary work experience and qualifications required at the job."

Recruitment: As an employee of a similar job in the past, the candidate showed confidence in picking out the right people for the tasks of salesperson. However, the candidate did not demonstrate any formal system of selecting an employee. He relies too much on CVs rather than also getting to know about personality dynamics and tendency for rapport with consultants, which he mentioned are critical aspects to the job of sales.

“Salespeople are assessed by whether they meet their set targets. If the salespersons do not meet their target, we give them one more chance before chucking them out. We also get feedback from the project consultants on how the salesperson interacts with them.”

Performance Appraisal: The primary way he assesses the performance of the salespeople under him is by seeing whether their targets have been met. It would be beneficial if assessment would be made beyond this level by being more actively involved in the perceptions of the consultant. The candidate appears to be passive about consultant feedback and does not actively seek it. It would also be useful if the appraisal had a process to it, with the Project Sales Manager having regular reviews of transactions. This system would have to be formalized. The Project Manager does not seem interested in improving salespeople's performance beyond meeting targets. He would rather they be recruited with the necessary competencies instead of continuously developing their sales style.

“I manage the team under me with communication through reports. We have meetings about the new and current projects. If there is a problem where a sales engineer has lost his cool with the consultant, I go and fix it myself.”

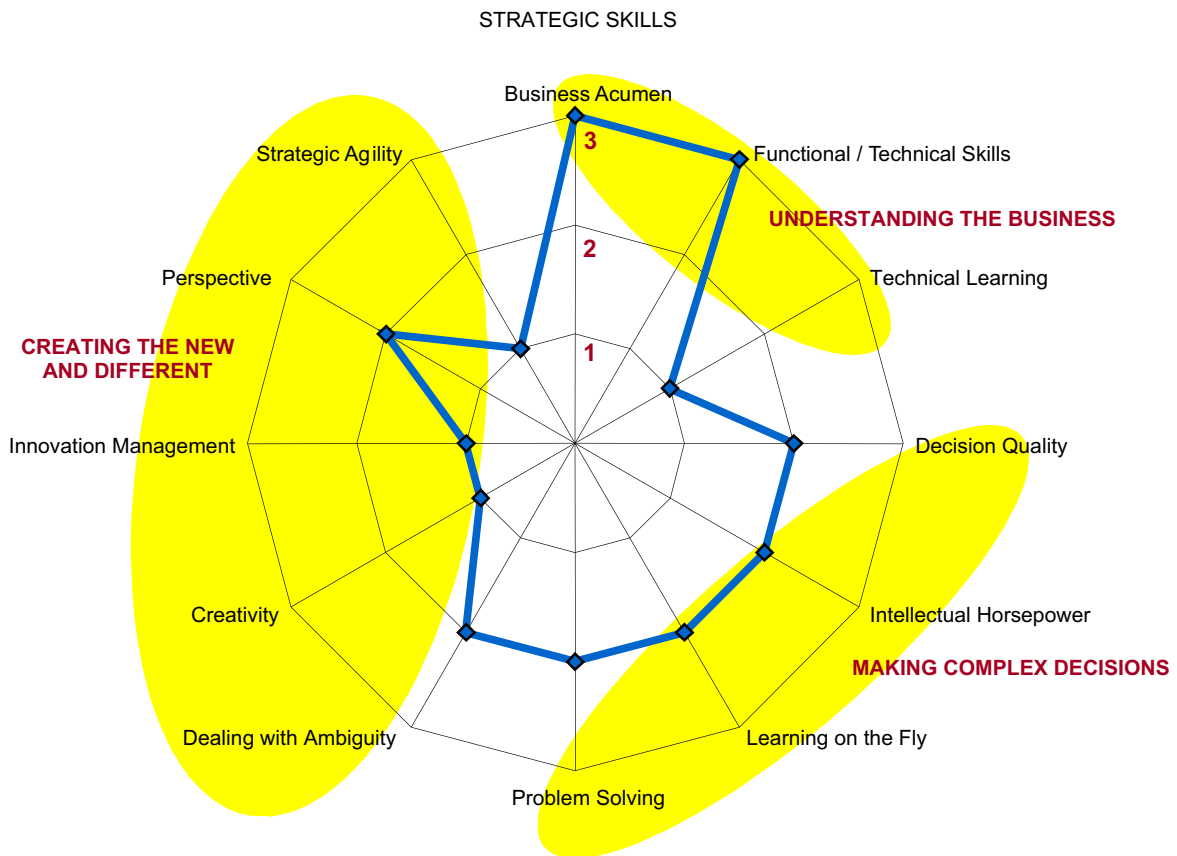
Team Management: The Project Manager appeared excellent in monitoring the team strictly in terms of bottom-line targets. However, he seems to manage the team at a level less than would be expected. He does not emphasize too much on channeled communication. He did mention that personal problems were talked about that might affect the person's job, but does not go out of his way to make sure of being interpersonally receptive and available. He may lack approachability. He stated that sometimes the customers were at fault if a problem such as 'specification errors' arose. He does not much believe in training salespeople with improving their rapport skills since he would smooth out any problems himself. Thus, the candidate is only available for the team if a major crisis arises. He leaves the salespersons to do the job without much monitoring on his part and is concerned about end results rather than procedural issues.



COMPETENCY PROFILE OF A SALES ENGINEER

The following profile is based on the Lominger Competency Model. The candidate was asked to sort out the cards according to what is most and least required of a sales engineer. Although the results of the sorting is meant to generate a profile of a Sales Engineer, it also sheds light on the Project Sales Manager's tendencies and expectations of the salespeople working under him.

The Lominger Model is divided into statistically derived factors, which make up behavioral clusters. Following is the assessment of what is expected of a Sales Engineer according to the Project Sales Manager. The scores of each cluster are averages on a scale of 1=Least Required to 3=Most Required competencies for the job. Each competency in high and low scoring clusters is described.

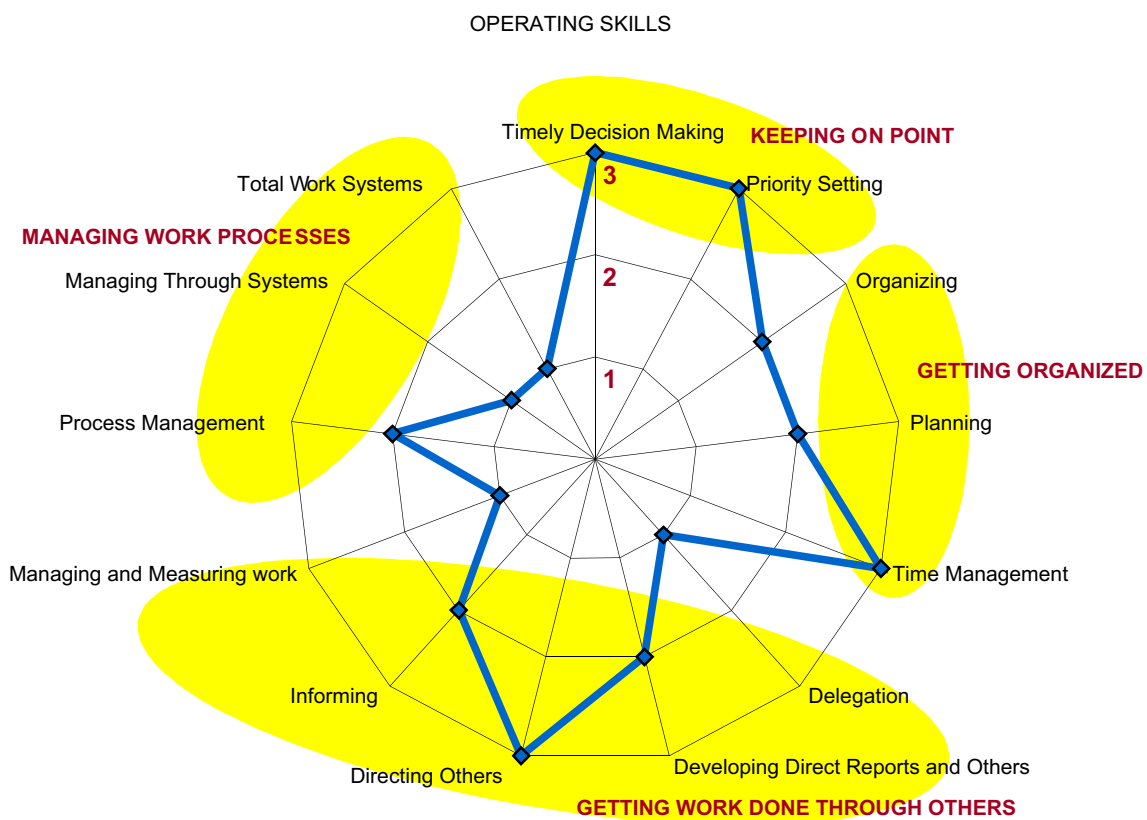


Understanding the Business (2.33)

Business Acumen (3)	Functional/Technical Skills (3)	Technical Learning (1)
Sales Engineers should know how businesses work, and be up with market trends, technology, and competition tactics	Sales Engineers must possess the functional and technical knowledge of how products work. This involves pump systems knowledge.	Sales Engineers are not required to get technological know-how about the product on the job. They will be recruited with it.

Creating the New and Different (1.40)

Sales Engineers were least required to demonstrate this cluster, which accounts for creative expression. The job entails following routine instructions which are to be followed if the Sales Engineer is to be rewarded. They are expected to be moderate in the competencies of 'Perspective' and 'Dealing with Ambiguity'. 'Perspective' involves looking at issues broadly and foreseeing possible problems or hindrances that might come up while making a sales transaction, relating to customers and product specifications. 'Dealing with Ambiguity' relates to how well the Sales Engineer can cope with change and act in situations of risk and uncertainty. The Sales Engineer would follow a routine, but may come across situations where there is no accepted protocol.

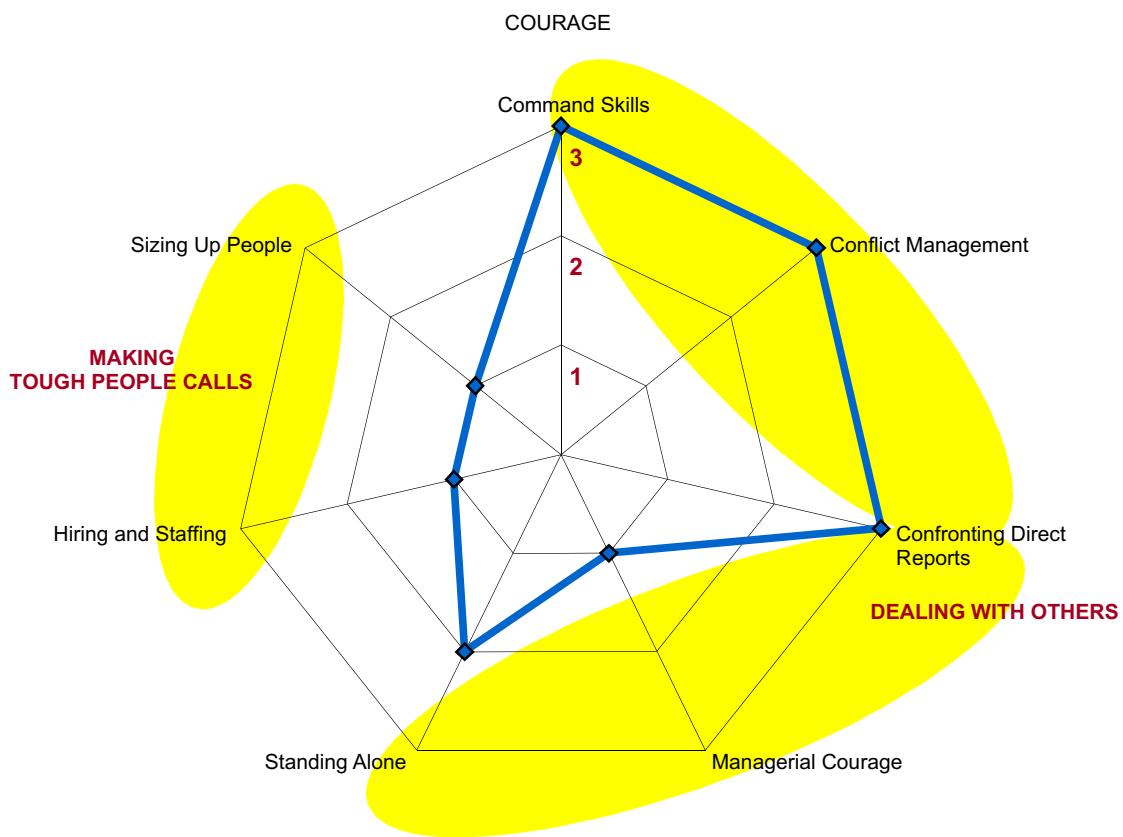


Keeping on Point (3.00)

<p>Timely Decision Making (3)</p>	<p>Priority Setting (3)</p>
<p>Sales Engineers must make decisions under pressure in order to meet deadlines. This could mean making quick choices even if the complete information is unavailable.</p>	<p>Sales Engineers must create focus and eliminate any roadblocks that may appear. They spend their time on what is important and must sense obstacles to goals.</p>

Managing Work Processes (1.33)

The Project Manager believes that this dimension is least required in terms of Operating Skills. Sales Engineers do not need to design work flow and systematic processes that allow managing from a distance other than their point of work. They are not required to exhibit the competency of 'Managing Through Systems.' They are mostly told what to do, where to go, and how they sell is up to them. They are not required to impact customers and results directly as much as the company does. Sales Engineers must simply deliver the goods and collect the money from sales for the company. They must be there for the transaction and cannot rely on others to make a sale as they are responsible for meeting their own targets. As a result, Sales Engineers are not accountable for the sales methods and tactics he uses to generate business although they are trusted with possessing the skills necessary for a competitive selling style.

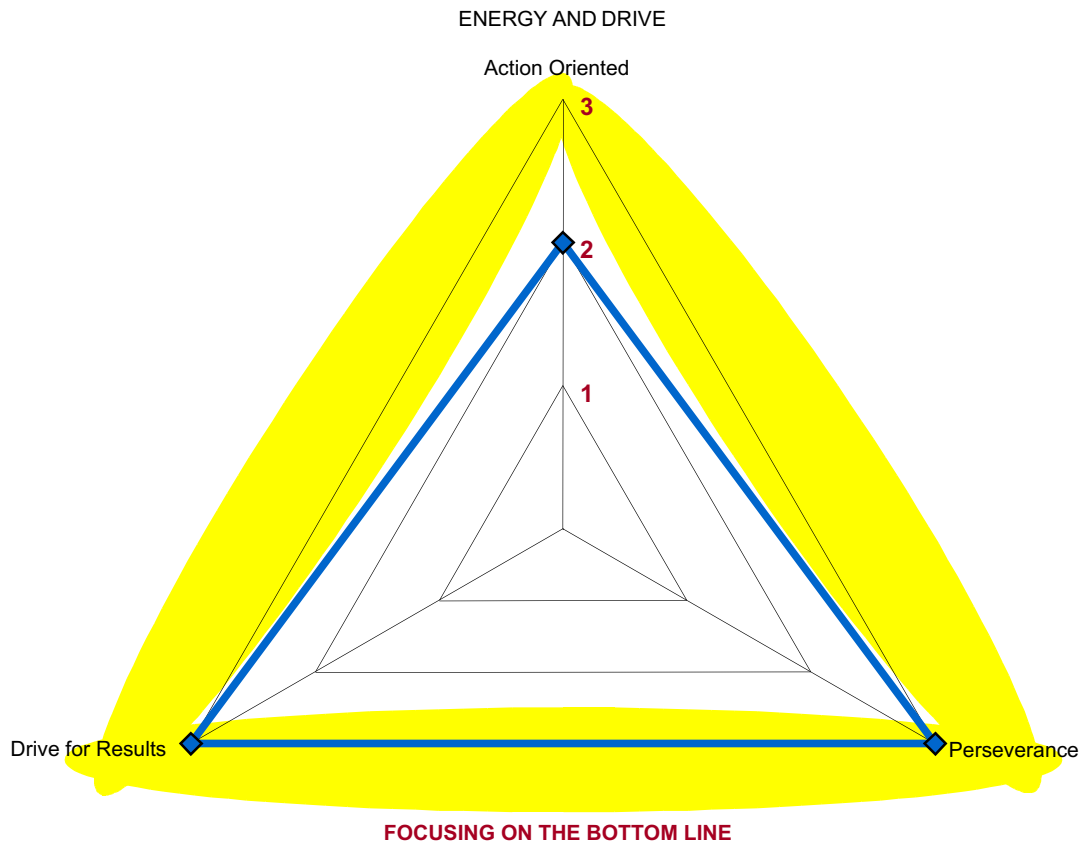


Dealing With Others (2.40)

Command Skills (3)	Conflict Management (3)	Confronting Direct Reports (3)	Managerial Courage (1)	Standing Alone (2)
Sales Engineers must love to lead a conversation. They must face problems head on and not be afraid of challenges.	Sales Engineers must see conflicts as opportunities. They must read situations quickly and agree to tough agreements, finding common ground.	Sales Engineers must deal with problems, communicate them to the boss as they surface and not allow them to pile up	Sales Engineers are not required to provide feedback to others, and not needed to take action directly with troublemakers.	Sales Engineers will sometimes have to stand up when times are tough, and may have to be alone without help on tough transactions.

Making Tough People Calls (1.00)

In the 'Courage' factor, this cluster is not required of the Sales Engineer. This dimension is about competencies relating to human resources. Sales Engineers under the Project Sales Manager do not need to hire and judge people's talent, or selecting among strong candidates. This is not a requirement of their job. They do not have to report to the boss on people who are working in their department, their performance, or comment on their strengths and weaknesses. There is no need for them to accurately forecast what people will do across business situations.

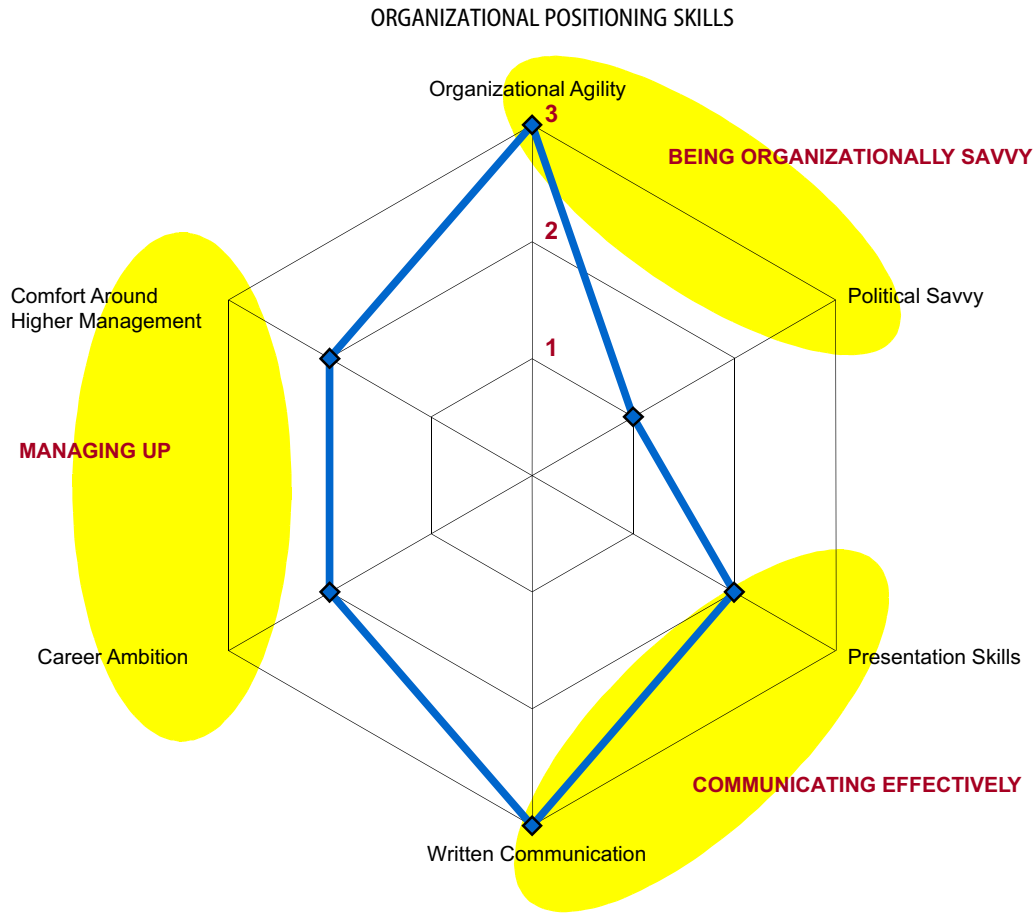


Focusing on the Bottom Line (2.67)

Action Oriented (2)	Drive for Results (3)	Perseverance (3)
Sales Engineers may have to put in effort and hard work to execute a sales transaction. The work is results oriented.	Sales Engineers must try to meet and exceed goals successfully. They must consistently perform and focus on the bottom-line.	Sales Engineers are expected to pursue what they do with high amounts of energy and drive, finishing tasks without failing.

This dimension is the highest scoring cluster in the Lominger Model for the job of Sales Engineer according to the Project Manager. It shows that the work is highly results-oriented, where rewards are not given based on effort. The bottom-line is the number one criterion for assessing the Sales Engineer's performance. However, there is a die hard belief that in order to get the results, being 'Action Oriented' may aid in accomplishing a goal, and possessing the competency of 'Perseverance' is definitely instrumental in achieving it as well. Thus, 'Energy and Drive' appears to be the highest on the priority list for the job of Sales Engineer according to the Project Sales Manager.





Communicating Effectively (2.50)

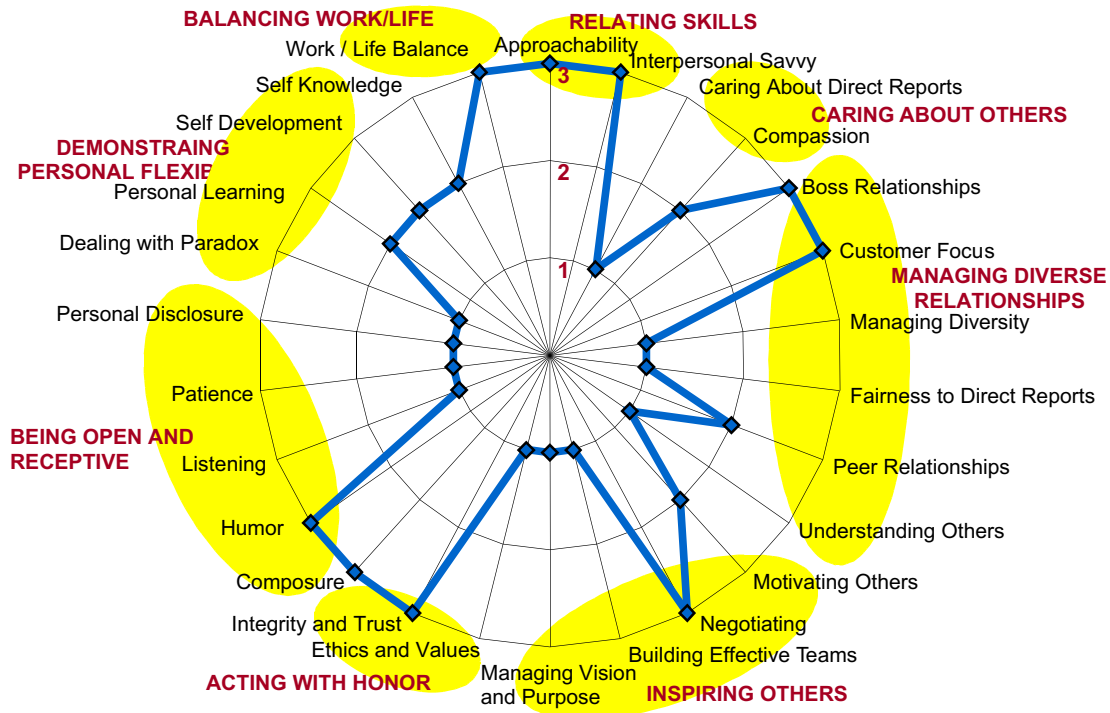
Written Communication (3)	Presentation Skills (2)
Sales Engineers must be able to write clearly and briefly about customer specifications. They must be good at utilizing various formats of reporting.	Sales Engineers are somewhat needed to be competent at presenting in a variety of settings, be it one-on-one and/or in large groups. He should command attention.

Being Organizationally Savvy (2.00) and Managing Up (2.00)

The requirement for Sales Engineers in the 'Being Organizationally Savvy' cluster is highest on the competency of 'Organizational Agility'. They need to be knowledgeable about how organizations work, they must know how to get things done through which channels, and must understand the company's internal policies and procedures to function effectively. Sales Engineers are least required to handle office politics quietly or on their own. Sales Engineers are expected to be somewhat comfortable around their senior managers. They do not need to be nervous or tense around them. 'Managing Up' is however not a high priority for them to perform successfully, although it may be desirable.



PERSONAL AND INTERPERSONAL SKILLS



Relating Skills (3.0) and Balancing Work/Life (3.0)

Approachability (3)	Interpersonal Savvy (3)	Work/Life Balance (3)
The Sales Engineer must be easy to approach and build rapport well He must be warm, pleasant, gracious and put others at ease.	Sales Engineers must relate well to all people. They must know how to build effective relationships using diplomacy to diffuse tension.	It is essential for the Sales Engineer to balance his work and personal life to be stable. He must avoid one-dimensionality.

Demonstrating Personal Flexibility (1.75) and Inspiring Others (1.75)

Sales Engineers do not have to demonstrate flexibility in their personal approach. They must not act in contradictory ways that would appear confusing to customers as well as supervisory bosses. They do not have to act differently in unusual situations. It is acceptable for Sales Engineers to be rigid in their approach and methods, using one sure way to get things done. It is desirable for Sales Engineers to learn and improve personal and interpersonal behavior, but this is not a high requirement according to the Project Manager. Sales Engineers are not expected to seek feedback.

'Inspiring Others' is not high on the list for the Sales Engineer's job. He is not expected to evoke emotional responses from customers to build their loyalty to the company. The Sales Engineer is not responsible to motivate the entire organization or departments. Sales Engineers are however required to be highly competent in 'Negotiating'. They must be diplomatic and be able to gain trust easily. Differences must be settled by them without damaging relationships but they must be direct as well.

