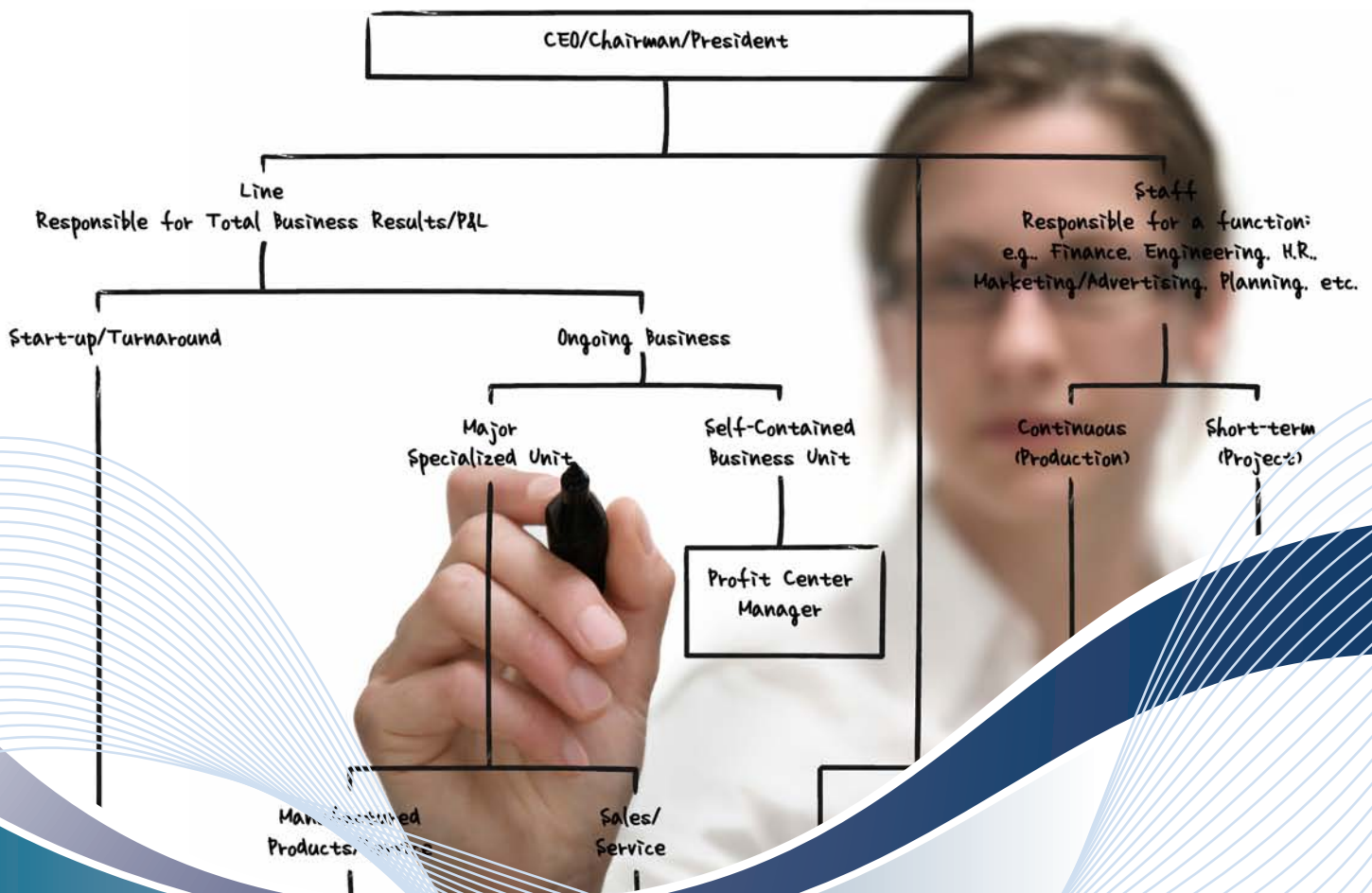


# The Talent Audit Process

A single, objective tool that provides an ongoing profile and skills library for alignment, development, selection and restructuring.





## OBJECTIVE, PREDICTIVE, REAL-TIME DATA AT YOUR FINGERTIPS

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

Most organizations have identified Talent Management as a strategic priority. However, the methods they use to evaluate employees are typically flawed. Making effective decisions about 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.

An assessment that creates truly predictive data is a priceless decision-making tool. That difference is exactly what makes HR Chally's Assessment and Talent Audit a key differentiator for every organization. Our unique, web-based assessment system for talent selection, alignment and development is truly the "next generation" of applying total quality management to talent management.

The Talent Audit process is most effective for strategic decision making when used on a continuing basis. Because data is predictive, its value for both employee development and career selection is unparalleled. After completing a Talent Audit, each organization has on-demand access to its own employee competency inventory. Once the database content is on file for assessed individuals, no further assessments of employees is necessary.

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



## DASHBOARD VIEW OF YOUR ORGANIZATION'S SKILL "DNA" AT A GLANCE

Just as DNA is specific to a given individual, a Talent Audit can pinpoint the "job skill DNA" of a given employee. The Talent Audit 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 individual. In this manner organizations are able to inventory a complete list of strengths and development needs for all key employees across every important position, with every team, or across the whole organization. And, once you implement the initial talent audit service, 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 organization.



## **TALENT ALIGNMENT & DEVELOPMENT APPLICATIONS**

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

### **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 human capital 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.

### **Human Resources**

Access and evaluate all incumbents in any group, to understand what areas are most appropriate for training across the entire group or the entire organization.

Create a corporate-wide profile of strengths and weaknesses to prioritize effective development initiatives, succession planning, and high-potential identification.

### **Sales Leader**

Identify incumbent salespeople most adept at developing new business (“hunters”) versus those best suited to managing existing customer relationships (“farmers”) or handling Strategic Accounts, or developing into a sales subject matter expert or any of 10 other key sales roles that World Class Sales Benchmarking Research has identified. Determine which salespeople have the predictive skill strengths required to succeed in a sales management role.

## WHY DO YOU NEED THE TALENT AUDIT PROCESS?

### When you are:

Setting up a high potential program

Involved in a succession planning program

Implementing to a new strategy

Reorganizing departments

In a downsizing mode or looking to re-deploy resources

### And you need to know:

Who is the best fit for new roles?

What training will my employees need for different jobs?

What is my current bench strength?

What talent do I have-who should I keep, re-deploy or let go?



# IT ALL STARTS WITH CHALLY'S ONE ON-LINE ASSESSMENT

## Each individual will start by taking the on-line assessment.

- 288 questions
- Take anywhere anytime
- 45-60 minutes to complete
- Collects 866 points of data "DNA"
- Measures selected competencies
- Available in 22 languages

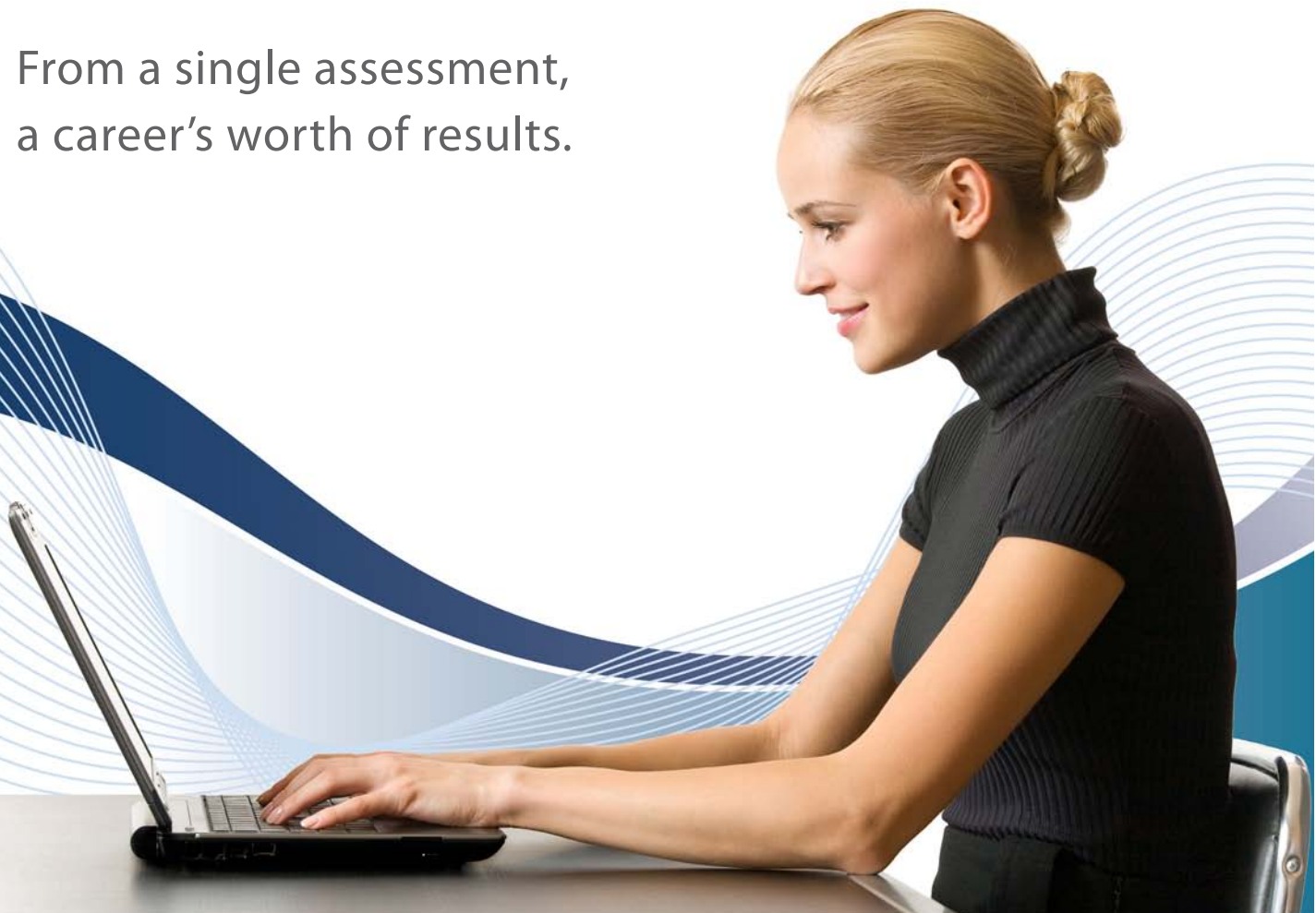
## Assessment Measures...

- Potential on-the-job behaviors relative to each predictive skill.
- Most distinctive (or driving) motivations and work habits.
- Candor in taking the assessment.

## Profile

The combination of Job Analysis and Validity Research identifies the competencies for successful performance in specific job roles.

From a single assessment,  
a career's worth of results.



# MATCHING RESULTS TO THE CORRECT COMPETENCY / PROFILE

Chally research has identified 3 core management types

## THREE TYPES OF MANAGEMENT

### LINE MANAGER

(Such as CEO, Division Head)

#### Line Oriented

- Accepts accountability for bottom-line results
- Seeks authority to make own decisions and bases them on input from informed players
- Develops general management skills rather than specific discipline or expertise
- Prefers a directive management approach
- Focuses on improving competitive advantage

### PROFIT CENTER

(Such as Business Unit Manager)

- Line oriented
- Hands-on style
- Has total authority for bottom-line results
- Manages all functions- goals based on shorter-term growth or profitability

### STAFF MANAGER

(Such as Finance, IT, Marketing, Legal, HR)

#### Staff Oriented

- Influences line decisions by providing expert or specialized input that shapes or supports those decisions
- Manages a staff function to generate state-of-the-art competence and information
- Motivates innovative thinking to create new advances in expertise and capacity that increase the function's value and influence
- Prefers a participative style of management and prefers consensus to individual action

## TWO APPROACHES

Within the three management types you also have two approaches.

LINE ORIENTATION

PROFIT CENTER

STAFF ORIENTATION

PRODUCTION  
APPROACH

PROJECT APPROACH

PRODUCTION  
APPROACH

PROJECT APPROACH

PRODUCTION  
APPROACH

PROJECT APPROACH

### Production Approach:

Focuses on measurable and near-term results and outputs; emphasizes efficiency and, through repetition, seeks the opportunity to fine-tune systems and optimize profitability and efficiency; control cost and refinement of the processes and procedures that produce incremental gains; guards against failure by implementing proven methods with slight modifications as needed to address problems, but avoids visionary or theoretical changes that have not been thoroughly tested and proven; thrives in situations that demand the optimization and refinement of an existing technology or function at an efficient level.

### Project Approach:

Focuses on innovation in exploring new business functions, capabilities or creative solutions to continuing business needs; sees improvement goals as a project or series of projects, each with distinctive beginning and ending points; more concerned with breakthrough improvements than incremental refinement; creates by instinct or insight, preferring to test new solutions by trial and error.

# SAMPLE TALENT AUDIT

The Talent Audit is enriched with data that can help you make critical placement, development and management decisions about your talent.

Skill comparisons and overall success potentials for identified management, leadership, or individual contributor profiles in a comprehensive dashboard.

Accurate measures of competencies actuarially validated against a database of over 300,000 successfully performing professionals, managers and salespeople.

## Profiles (Unique Roles)

| Talent Audit                    |            |                     |                  |               | Db1 Click To Open                           | Db1 Click To Open                                 | Db1 Click To Open                               | Db1 Click To Open                      | Db1 Click To Open                              |    |
|---------------------------------|------------|---------------------|------------------|---------------|---|---|---|--|--|----|
| Your Company's Name Here        |            |                     |                  |               | GENERAL MANAGER OVERALL SUCCESS PROBABILITY | BUSINESS UNIT MANAGER OVERALL SUCCESS PROBABILITY | SALES FORCE MANAGER OVERALL SUCCESS PROBABILITY | HR MANAGER OVERALL SUCCESS PROBABILITY | CORPORATE ATTORNEY OVERALL SUCCESS PROBABILITY |    |
| By The HR Chally Group          |            |                     |                  |               |   |   |   |  |  |    |
| Last Name                       | First Name | Title               | Manager          | Region        |   |   |   |  |  |    |
| BACON                           | REBECCA    | HR Manager          | Clark Kent       | South         | 52  | 68  | 69  | 60                                     | 49   |    |
| CLARK                           | THOMAS     | HR Manager          | Bruce Wayne      | West          | 27  | 72  | 58  | 71                                     | 61   |    |
| DUPOIS                          | PIERRE     | General Manager     | Jacques Clouseau | International | 42  | 59  | 63  | 58                                     | 58   |    |
| FRANCOIS                        | RENE       | General Manager     | Jacques Clouseau | International | 23  | 61  | 51  | 64                                     | 63   |    |
| GARCIA                          | CARLOS     | General Manager     | Jose Jimenez     | International | 66  | 65  | 61  | 59                                     | 57   |    |
| GOMEZ                           | JILL       | HR Manager          | Clark Kent       | East          | 66  | 23  | 55  | 29                                     | 60   |    |
| HOWARD                          | SAM        | General Manager     | David Jansen     | North         | 64  | 34  | 53  | 36                                     | 80   |    |
| KENT                            | CLARK      | HR Manager          | Ronald Kennedy   | East          | 64  | 65  | 64  | 56                                     | 55   |    |
| NELSON                          | OWEN       | HR Manager          | David Jansen     | West          | 31  | 77  | 67  | 70                                     | 61   |    |
| RICCARDO                        | JUAN       | HR Manager          | Jose Jimenez     | International | 46  | 72  | 72  | 63                                     | 72   |    |
| SAMUELS                         | PAUL       | Sales Force Manager | Bruce Wayne      | North         | 23  | 76  | 63  | 77                                     | 70   |    |
| SMITH                           | CHRIS      | General Manager     | David Jansen     | North         | 71  | 73  | 72  | 66                                     | 55   |    |
| WITT                            | TED        | General Manager     | Bruce Wayne      | North         | 33  | 68  | 65  | 57                                     | 25   |    |
| <b>Average Scores</b>           |            |                     |                  |               |   |   |   |  |  |    |
| Probability of success for team |            |                     |                  |               | Average                                     | 47  | 63  | 63                                     | 59   | 59 |
|                                 |            |                     |                  |               | Count                                       | 13  | 13  | 13                                     | 13   | 13 |
|                                 |            |                     |                  |               | Strength                                    | 5   | 11  | 7                                      | 6  | 6  |
|                                 |            |                     |                  |               | Coachable                                   | 1   | 0   | 6                                      | 5  | 7  |
|                                 |            |                     |                  |               | Weakness                                    | 7   | 2   | 0                                      | 2  | 7  |

**Average Scores**  
Probability of success for team

**Your Talent Pool**  
Listing of employees who have completed the Chally Assessment.

|                           |
|---------------------------|
| Recommended               |
| Recommended With Concerns |
| Not Recommended           |

**Scores By Profile**  
Probability of success by individual scores

**Color Coding Scores**  
Color coding indicates the individual's potential to successfully fill each of the Leadership/Management profiles identified. Green indicates strength or recommended for the position; yellow indicates caution / recommended with concerns; red indicates weakness or not recommended for this particular position.

# EXPANDED VIEW OF THE TALENT AUDIT WITH UNIQUE, PREDICTIVE SKILLS BY PROFILE

## Predictive Skills (for General Manager Profile)

By simply clicking on the profile column the file expands to show predictive skills measured within that specific profile.

| Talent Audit             |            |                     |                  |               | Dbl Click To Close |                     |  |                            |                          |                        |                                      |                        |                  |   | Dbl Click To Open |
|--------------------------|------------|---------------------|------------------|---------------|--------------------|---------------------|--|----------------------------|--------------------------|------------------------|--------------------------------------|------------------------|------------------|---|-------------------|
| Your Company's Name Here |            |                     |                  |               | LINE ORIENTATION   | PRODUCTION APPROACH | DIRECTS AND CONTROLS OTHERS IN A CORPORATE SETTING | DECISION MAKING EFFICIENCY | DECISION MAKING ACCURACY | WRITTEN COMMUNICATIONS | INSPIRES ACCOUNTABILITY AND TEAMWORK | PRACTICAL INTELLIGENCE | ANALYTIC ABILITY | GENERAL MANAGER OVERALL SUCCESS PROBABILITY |                   |
| By The HR Chally Group   |            |                     |                  |               |                    |                     |  |                            |                          |                        |                                      |                        |                  |   |                   |
| Last Name                | First Name | Title               | Manager          | Region        |                    |                     |  |                            |                          |                        |                                      |                        |                  |   |                   |
| BACON                    | REBECCA    | HR Manager          | Clark Kent       | South         | 80                 | 89                  | 23   | 47                         | 39                       | 64                     | 28                                   | 97                     | 99               | 52  |                   |
| CLARK                    | THOMAS     | HR Manager          | Bruce Wayne      | West          | 17                 | 22                  | 28   | 15                         | 15                       | 64                     | 26                                   | 81                     | 42               | 27  |                   |
| DUPOIS                   | PIERRE     | General Manager     | Jacques Clouseau | International | 58                 | 59                  | 28   | 31                         | 15                       | 81                     | 26                                   | 75                     | 36               | 42  |                   |
| FRANCOIS                 | RENE       | General Manager     | Jacques Clouseau | International | 25                 | 22                  | 6  | 20                         | 3                        | 81                     | 5                                    | 97                     | 57               | 23  |                   |
| GARCIA                   | CARLOS     | General Manager     | Jose Jimenez     | International | 87                 | 68                  | 71   | 72                         | 31                       | 81                     | 57                                   | 81                     | 75               | 66  |                   |
| GOMEZ                    | JILL       | HR Manager          | Clark Kent       | East          | 74                 | 89                  | 86   | 50                         | 54                       | 64                     | 60                                   | 75                     | 50               | 66  |                   |
| HOWARD                   | SAM        | General Manager     | David Jansen     | North         | 99                 | 99                  | 83   | 34                         | 33                       | 64                     | 77                                   | 92                     | 97               | 64  |                   |
| KENT                     | CLARK      | HR Manager          | Ronald Kennedy   | East          | 94                 | 76                  | 73   | 45                         | 37                       | 92                     | 56                                   | 73                     | 86               | 64  |                   |
| NELSON                   | OWEN       | HR Manager          | David Jansen     | West          | 17                 | 22                  | 17   | 10                         | 94                       | 64                     | 6                                    | 48                     | 50               | 31  |                   |
| RICCARDO                 | JUAN       | HR Manager          | Jose Jimenez     | International | 87                 | 76                  | 33   | 47                         | 23                       | 23                     | 38                                   | 97                     | 98               | 46  |                   |
| SAMUELS                  | PAUL       | Sales Force Manager | Bruce Wayne      | North         | 17                 | 22                  | 33   | 15                         | 12                       | 42                     | 20                                   | 99                     | 97               | 23  |                   |
| SMITH                    | CHRIS      | General Manager     | David Jansen     | North         | 84                 | 49                  | 94   | 72                         | 58                       | 92                     | 83                                   | 97                     | 90               | 71  |                   |
| WITT                     | TED        | General Manager     | Bruce Wayne      | North         | 87                 | 68                  | 14   | 15                         | 3                        | 42                     | 8                                    | 98                     | 63               | 33  |                   |
| Average                  |            |                     |                  |               | 64                 | 59                  | 45   | 36                         | 32                       | 66                     | 38                                   | 85                     | 72               | 47  |                   |
| Count                    |            |                     |                  |               | 13                 | 13                  | 13   | 13                         | 13                       | 13                     | 13                                   | 13                     | 13               | 13  |                   |
| Strength                 |            |                     |                  |               | 50 - 100           |                     | 50 - 100   |                            | 50 - 100                 |                        | 50 - 100                             |                        | Count Strength   | 5   |                   |
| Coachable                |            |                     |                  |               | 40 - 49            |                     | 40 - 49  |                            | 40 - 49                  |                        | 40 - 49                              |                        | Count Coachable  | 1   |                   |
| Weakness                 |            |                     |                  |               | 0 - 39             |                     | 0 - 39   |                            | 0 - 39                   |                        | 0 - 39                               |                        | Count Weakness   | 7   |                   |

### Average Scores

Probability of success for team for each competency.

|           |
|-----------|
| Strength  |
| Coachable |
| Weakness  |

### Scores By Skill

Probability of success by individual scores

### Color Coding Scores

Color coding indicates the individual's potential to successfully perform each of the Leadership/Management predictive skills identified. Green indicates strength, Yellow indicates coachable, Pink indicates weakness or not a strength for this particular skill.



## WHAT IS INCLUDED IN THE TALENT AUDIT PROCESS?

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

- 1.** Electronic Summary report which illustrates aggregate data by person, profile and individual skills. This enables you to assess your team against identified competencies, segmented by job profiles, to determine what talent potential exists and where development is needed.
- 2.** An updated electronic report based on new hires, promotions, deletions, reorganizations after initial talent audit.
- 3.** Executive Overview - provides an analysis of key findings in the Talent Audit.
- 4.** Measurement of team potential against identified management, leadership or individual contributor profiles.
- 5.** Manager and Individual employee reports which outline scoring by skill, descriptions and coaching tips.
- 6.** Two-hour telephone debrief with Chally Professional Service Advisor to review results.
- 7.** Allotment of additional assessments for new hires based on initial talent audit employee count.

**For more information, contact Chally at 1.800.254.5995**

# THE TALENT AUDIT... A PROVEN SOLUTION

## Testimonials

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*

---

"I began looking for a tool that would allow us to assess and benchmark the competency of my client's workforce. With the results in hand, I hoped to build a training department for the bank that would focus on performance-based learning. What I learned by using the Chally Talent Audit was that we could see the strength of the workforce (in a color-coded way) that enabled us to review the alignment of business strategy with selection and with development. It is the first time I have been able to accomplish this with the use of just one tool."

"The ability to re-sort the data using various columns on the Talent Audit has proven very helpful in specific meetings, as we try to explain the results and discuss what is appropriate to do."

### **Elizabeth M. Smith, Owner and Managing Director**


*Heron Consulting Group, LLC*

---

"When I found out about the Talent Audit, I realized that this solution was unequalled in the industry. I like all the features of the Talent Audit, especially being able to view the group all together and the ease of sorting the data any way you want - individual groups, locations, positions. I am able to see areas of practical intelligence, analytical ability and validity about a person or group, at a glance. It is so valuable to be able to see average scores on all competencies across all profiles. The Talent Audit is a major collection of competency information which can be organized for any situation."

### **Marcia Venus, Ph.D., Owner**

*Venus Leadership*



The HR Chally Group is a sales improvement, talent management, and leadership development corporation providing Total Quality Sales and Talent Management (TQSalesM™ and TQTalentM™) tools and research services across 35 countries for over 36 years. Chally is recognized as an international technology leader in scientific assessment and prediction for selection, job alignment, and development of sales and leadership.

Copyright © The HR Chally Group

3123 Research Blvd Suite 250  
Dayton, OH 45420

937.259.1200 ph  
937.259.5757 fax  
[www.chally.com](http://www.chally.com)



7022.2