

Understanding Sales Assessment

Introduction and Refresher Session

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SHL.



Our Session Objectives

Understand assessments, and why we use these in selection

Understand the value of assessing personality and motivation in selection

Understand an overview of the OPQ and MQ

Learn about how the OPQ and MQ link to the Sales Report

Learn how to report insights support hiring processes

Who are SHL?

- ✓ Providing **people answers** for over 10,000 businesses worldwide
- ✓ **40 years** building objective assessments for use in selection, development and talent management
- ✓ **35 million** assessments per year
- ✓ **45 billion** data points on people and performance
- ✓ Over **300** Organisational Psychologists in **30** different countries
- ✓ Assessments in **38** different languages
- ✓ **Award-winning solutions:** recent awards include:
 - ✓ **Top 100 Human Resource Service Provider (Top HR)** for quality of service, efficiency and scale
 - ✓ **Best Talent Assessment Provider of the Year (Top HR)** for innovative products, services and industry contribution
 - ✓ **Top 2020 Recruitment Assessment Solution Provider (HREC)** for professional services, scientific credibility and industry contribution (according to HR leaders from 616 companies)
 - ✓ **Top HR Product of 2019 (Human Resource Executive)** for AI technology, user experience and scientific rigour



Before we get into the content...

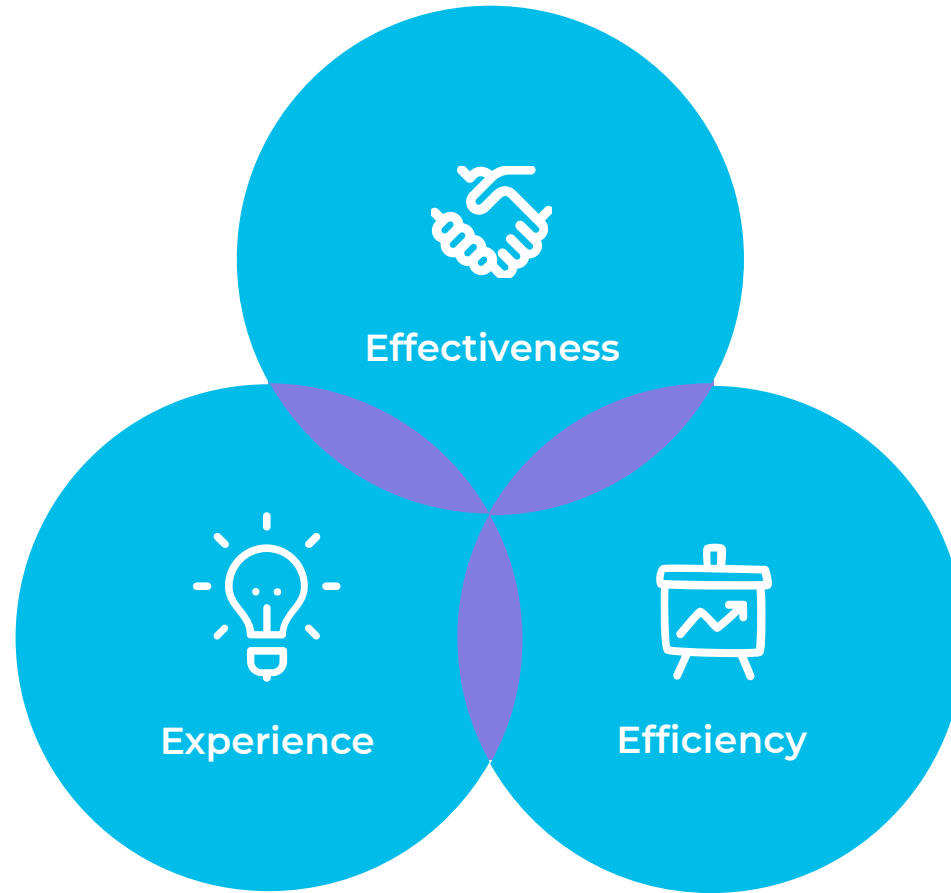
Who here has background knowledge or experience of using assessments?

What do you know about the existing assessments and tools (i.e., OPQ/MQ/Sales Report) already?

What's assessment all about?



What we need from assessment



Starting with effectiveness



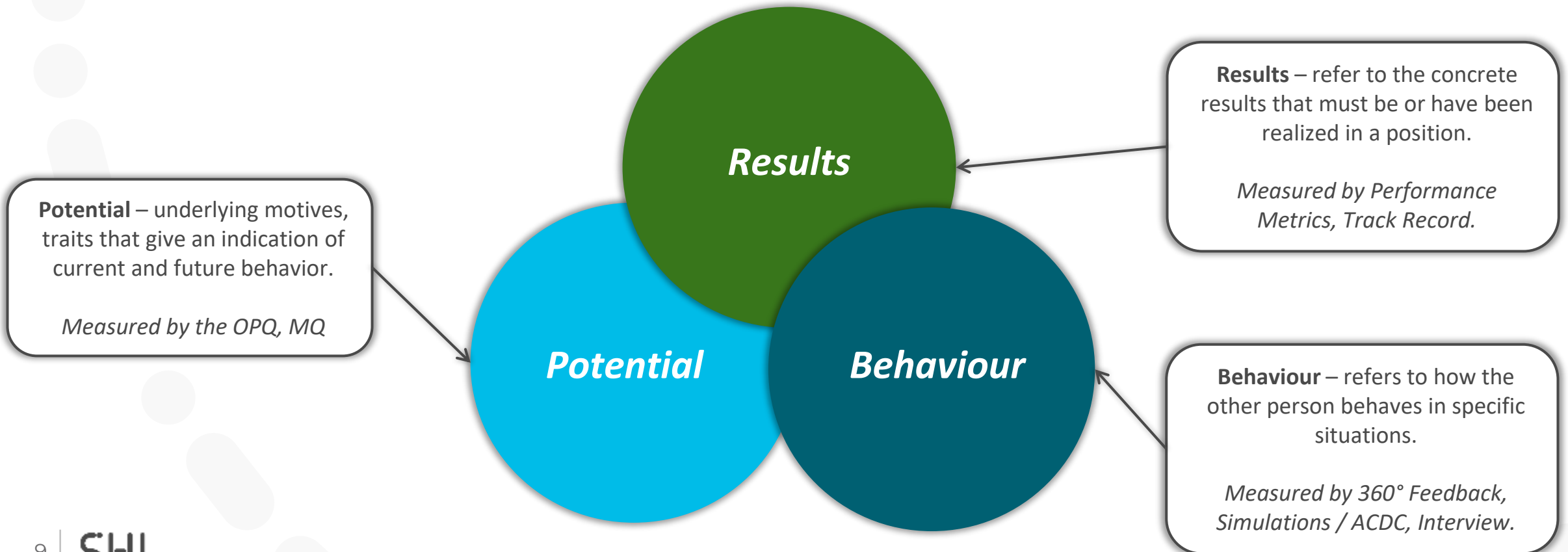
What do we mean by 'Talent'?



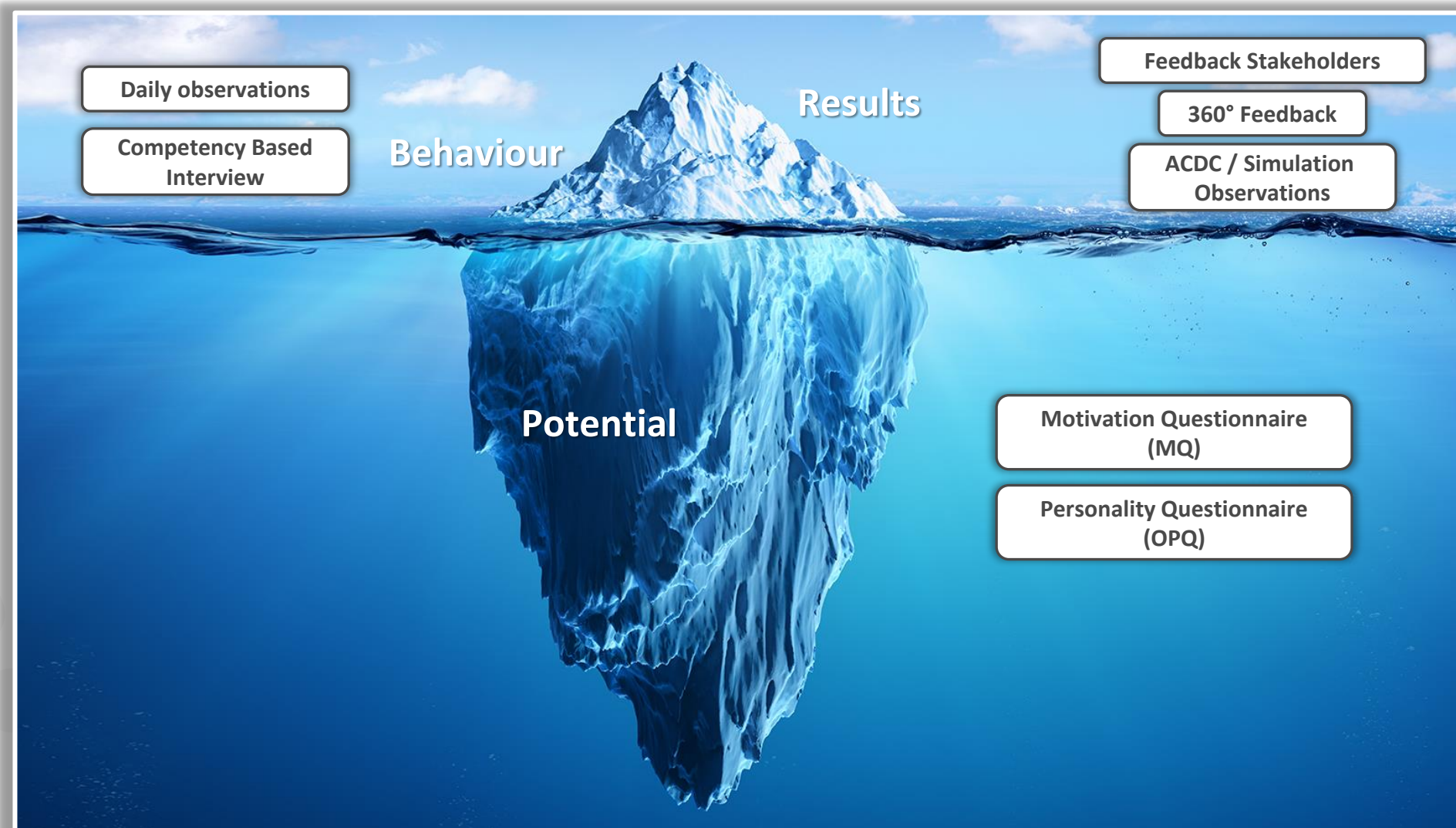
How can we identify this 'talent'?

The Potential / Behaviour / Results Model

- The 3-circle model describes the important elements for success in a position or role. In order to predict future results, it is important to measure both **potential** and critical **behaviour** that is linked to the KPIs and to the desired **results**.



Many critical aspects of 'talent' are not observable on the surface...



Do we really need to look at all this?

I usually get a good 'gut feeling' about someone

This person seems a lot like me – I think we'll get along

They were running late – they must not be a good candidate

These are common biases that **we are all susceptible to**

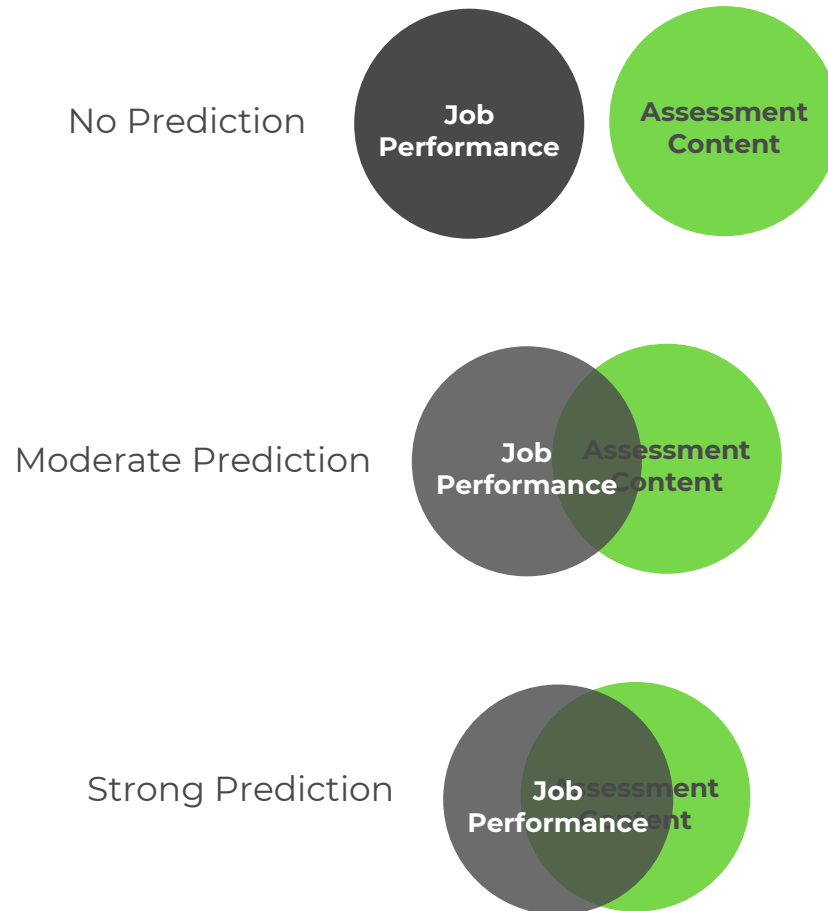
- Halo/ Horn effect
- Central tendency
- Response bias
- Like me...
- Contrast effect
- Personal bias

If we make decisions based on gut feel, the reality is that we are:

- Disadvantaging candidates from particular groups
- Limiting diversity in our organisation
- Rejecting strong candidates
- Hiring in a way that may not be legally defensible

This is why it is important to identify what aspects of talent are critical for a role, and use objective assessment to measure this rather than relying on gut feel

The ability to successfully predict job performance (i.e., and get the right people in role in a fair way) depends on this



No single assessment can predict the full range of job performance....

...therefore, we should utilize a purposeful combination of complimentary assessments that target key job performance criteria or requirements

Comparing Predictive Power

A question to you – in general (this is not a role-specific question) - what factors do you think would be included in each of the boxes below?

Good predictors of job performance

- Personality Questionnaires
- Motivation Assessment
- Ability Tests
- Structured Interviews
- Skills Tests
- Situational Judgement Tests

Poor predictors of job performance

- Years of Job Experience
- Years of Education
- Qualification Level
- Age

Our Focus Areas for Today

Personality and Motivation



So, we're saying personality is important – but what is it?

An individual's **preferred way of behaving, thinking and feeling**. These are the behaviors, thoughts and feelings that are **most natural** for someone to display. As a result, these often lead to our **'go-to' behaviours** when we are under stress.

Personality Does Not Equal Behaviour

Personality is not the same as behaviour, personality influences behaviour.

Behaviour > Personality

Someone's **actual** behaviour can be better than their **preferred** behaviour, for instance if they have become effective in doing something that is part of their work, but which is not their preferred behaviour.

Displaying behaviour which is not your preferred behaviour **can cost significantly more energy.**

e.g. Presenting, Planning, Analyzing.

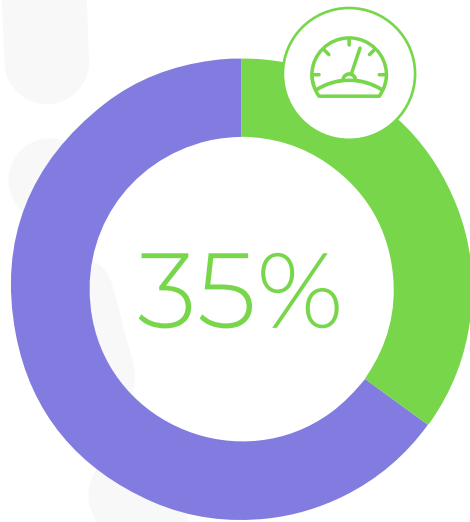
Personality > Behaviour

Someone's **preferred** behaviour can also be stronger than the **actual** behaviour they show at work, for instance if they like to behave in a certain way which isn't part of their role.

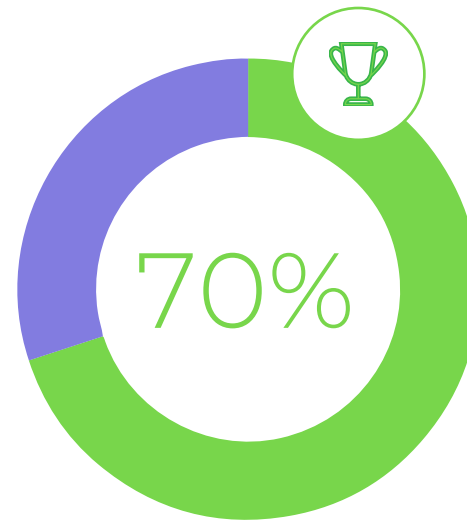
This is behaviour, which is **typical for someone**, but is **not an essential requirement or part** of a position or job description.

e.g. Outgoing, Caring, Relaxed.

Why is personality relevant?



Large-scale scientific studies show that personality accounts for **35%** of the **difference in workplace performance**

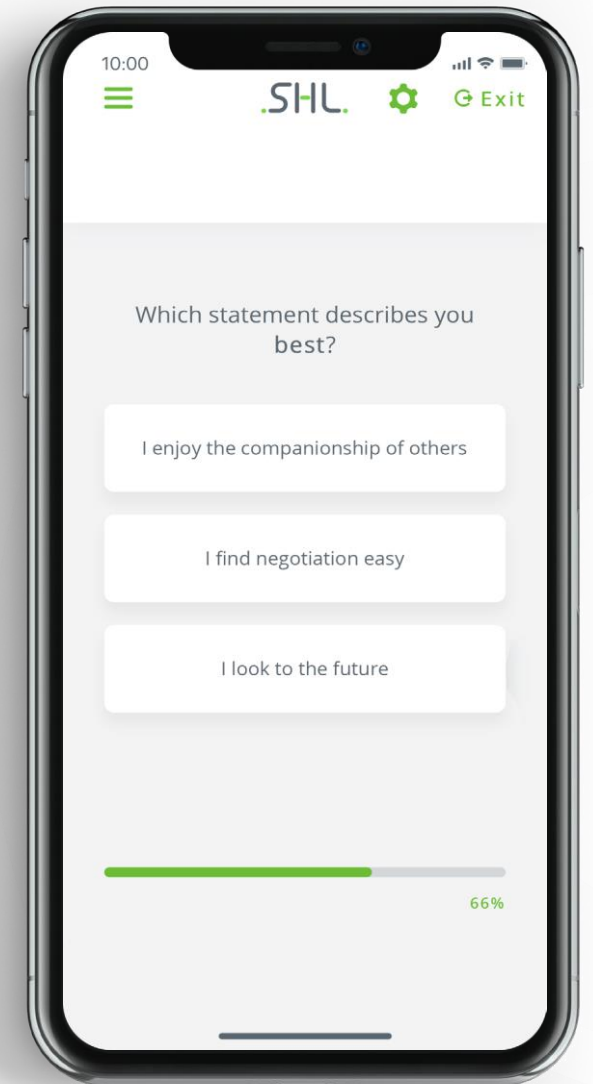


Results from a large number of job analysis projects indicate that up to **70%** of attributes that drive success at work are **aspects of personality** (rather than ability)

About the Occupational Personality Questionnaire (OPQ)

- Measures a person's typical way of **behaving, thinking and feeling** in the workplace.
- Assesses **32** specific characteristics of personality.
- Taps into **preferred style** not ability.
- It is a **self-report** measure – one source of information.
- Takes approximately **20 minutes** to complete.
- Assesses responses against a large **comparison group**.

Last year alone, the OPQ was used to assess 1.1 million candidates by 2,858 companies in 61 countries.



How do we define motivation?

A combination of factors which give us the **drive** to perform to the best of our potential. Motivation **energises, directs, sustains and maintains** our behavior.

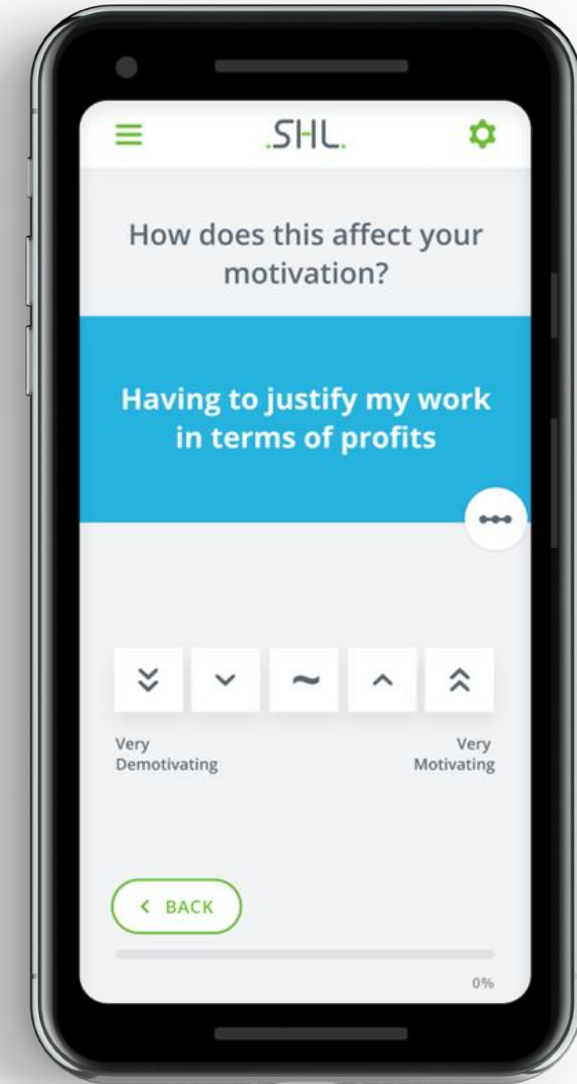
About the Motivation Questionnaire (MQ)

Assesses which situations or factors are likely to increase or reduce an individual's motivation at work.

- Provides organisations with an understanding of what really drives individuals to excel

The measured dimensions of motivation fall into four broad categories:

Energy & Dynamism
Synergy
Intrinsic
Extrinsic



Why is it relevant for us to look at motivation? What's the difference versus personality?

Measuring *personality* shows us natural style

By contrast, our internal *motivation* tells us about the structural or circumstantial factors in our environment or approach that are likely to impact the extent to which we thrive at work.

Personality

One's preferred style



OPQ

Motivation

What drives someone



MQ

- The OPQ and MQ form a good and strong combination
- For example:
- The MQ indicates that Mr. X finds it motivating to take the lead
- The OPQ indicates that his preferred leadership style is (likely to be) democratic and caring

**So - candidates have
completed the OPQ and MQ**

**How do we get from this to useable
information that predicts job
performance in Sales roles?**



Understanding Competencies and Potential



Competencies are sets of behaviours that are instrumental in the delivery of desired results.



The more **potential** a person has on a certain competency, the more likely it is that they will successfully display the underlying behaviours at work.

“A competency... is the **repertoire** of capabilities, activities, processes and responses available that enable a range of work demands to be met **more effectively** by some people than by others.”

Bartram and Kurz (2002)

The OPQ and MQ are measuring competency potential and fit through assessing behavioural and motivational style...

SHL has **extensively** researched how the traits measured by our assessments cluster together to predict competencies (i.e., sets of behaviour).

To summarise:

When you complete the OPQ and MQ, we have **measured your natural style**

- This enables us to understand your likely strengths, development areas, and fit in relation to critical sets of work behaviours (competencies)
- It also tells us about whether particular environments will be aligned with an individual's motivational drivers

It's important to note that you can work in a way that opposes your natural style

Introducing the SHL Sales Model

**A Model of Sales Success:
Predicted by Selected Factors
of the OPQ & MQ**



The SHL Sales Model: Competencies for Sales Success

Three Key Elements

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graph TD; A[Three Key Elements] --> B[Sales Foundations]; A --> C[Motivation]; A --> D[Sales Cycle];
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Sales Foundations

Focuses on factors that are important to sales effectiveness in most sales situations. While the relevance of these factors may vary from job to job, these are key factors that apply to most sales roles.

Motivation

Focuses on motivators that can influence sales effectiveness, specifically looking at factors that are important for the direction and maintenance of energy in a sales environment.

Sales Cycle

Focuses on factors that are important in a typical sales process. Understanding an individual's natural strengths in the sales cycle can help to determine the type of sales environment in which they can be most effective.

Sales Foundations

Focuses on factors that are important to sales effectiveness in most sales situations. While the relevance of these factors may vary from job to job, these are key factors that apply to most sales roles.

Sales Confidence

Projects an air of confidence when dealing with others and portrays outstanding personal capabilities and talents.

Sales Drive

Has drive and enthusiasm, seems hungry for success, and propels oneself to meet tough targets.

Sales Resilience

Is full of optimism and very resilient, perseveres in the toughest situations, is on the lookout for new opportunities.

Adaptability

Identifies and adopts the most appropriate style to maximise success in sales situations. Is able to relate to clients or prospects.

Listening

Listens sympathetically to others and vigilantly observes and interprets peoples' behaviour.

Embracing Change

Has the ability to quickly adapt to dramatic and continued changes in the workplace or environment or changes in the way things are done.

Motivation

Focuses on motivators that can influence sales effectiveness, specifically looking at factors that are important for the direction and maintenance of energy in a sales environment.

Money

Monetary and material rewards

Competition

Opportunities to win against colleagues and competitors

Achievement

Having clear goals and situations where personal performance is key

Pace

An environment with thriving activity and busy schedules

Social Contact

Having to deal with other people throughout the workday

Recognition

An environment where one receives plenty of praise and recognition of good work

Growth

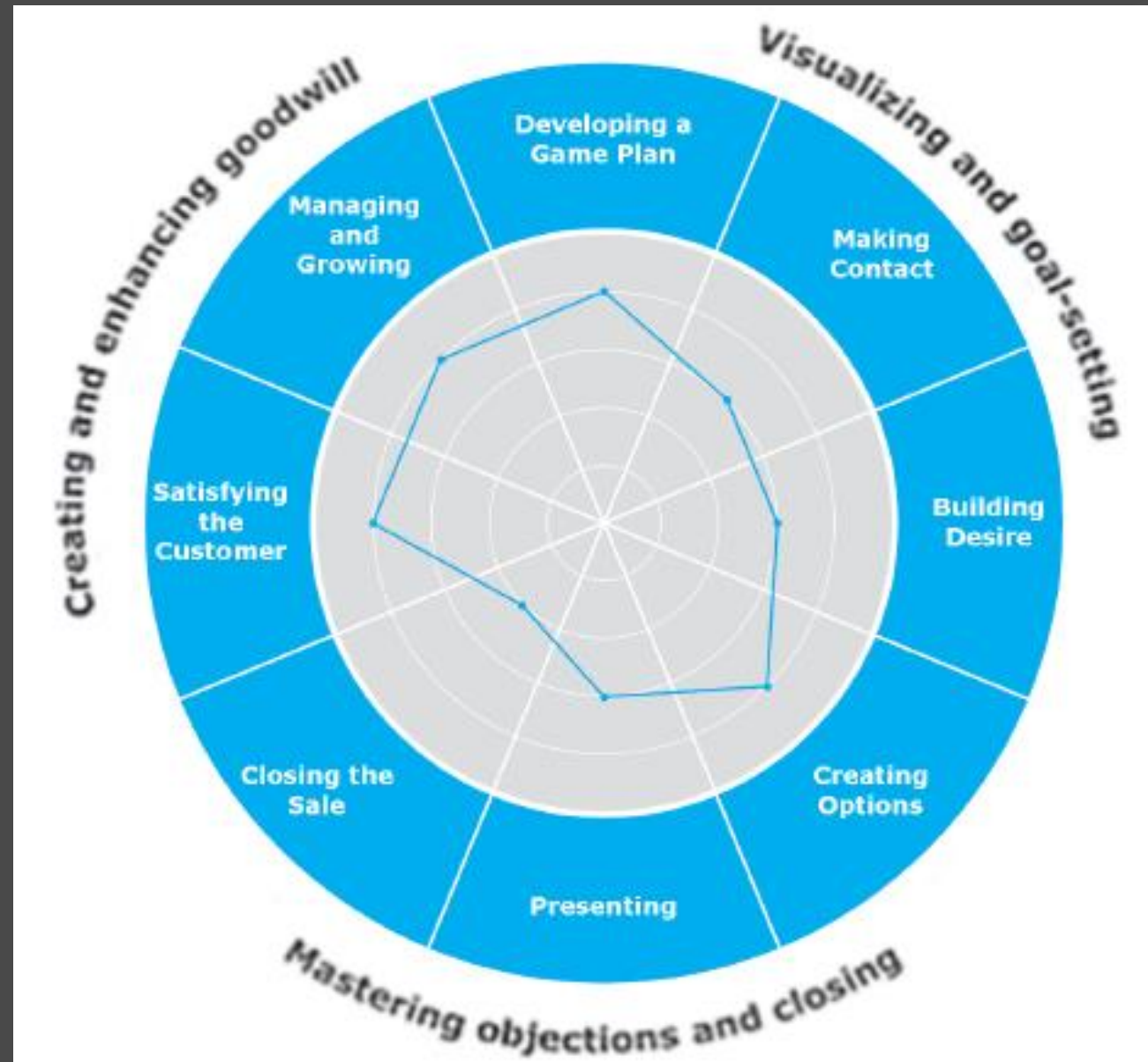
Having the opportunity for development and learning of new skills

Autonomy

Being without tight supervision, having freedom to structure own work

Sales Cycle

Focuses on factors that are important in a typical sales process. Understanding an individual's natural strengths in the sales cycle can help to determine the type of sales environment in which they can be most effective.



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Developing a Game Plan

Analysing the market in depth, putting effort into positioning products and effective sales activities.

Making Contact

Contacting prospects, 'breaking the ice' and making people feel comfortable, taking the initiative to establish new relationships.

Building Desire

Engaging the customer emotionally, creating a preference to buy and a feeling of fondness about the product or service.

Creating Options

Understanding the customer's needs and producing innovative solutions.

Presenting

Presenting products and/or solutions engagingly and confidently to individuals and customer groups; feeling free of stress and worries.

Closing the Sale

Bringing the business home, managing the customer for timely decisions, dealing with objections, negotiating final price and conditions of sale.

Satisfying the Customer

Delivering post sales care persistently, relating to the customer and taking all steps necessary to satisfy the customer.

Managing and Growing

Maintaining the customer relationship after the sale is completed, continuously looking to identify new needs and business opportunities.

The SHL Sales Report

A report designed to enhance your
decision-making in the hiring process



The Sales Report

- The SHL Sales Report helps to understand a candidate's or employee's potential fit in a sales role, including their strength and development areas in a typical sales cycle. The results help you to:
 - Identify top sales performers
 - Recruit salespeople with the potential to sell more
 - Reduce the costs of turnover in sales teams
 - Develop existing sales teams
- The results are based on the candidate's responses to the Occupational Personality Questionnaire (OPQ) and the Motivational Questionnaire (MQ).
- Application is possible in selection or development contexts
- The report is suitable for HR and Line Managers



Applying the Report

How to use it effectively



Let's start with what **not** to do...

This report shows the output of assessments that measure **personality** and **motivation**

If we rewind to our earlier conversation → this means we are looking at **natural style and fit to the Sales context**

But remember, **personality does not equal behaviour**

And this report **does not** tell us about someone's **ability** in each of these areas

**This means that we
never make a
decision based on
this report alone**

How **should** you apply this report?

1

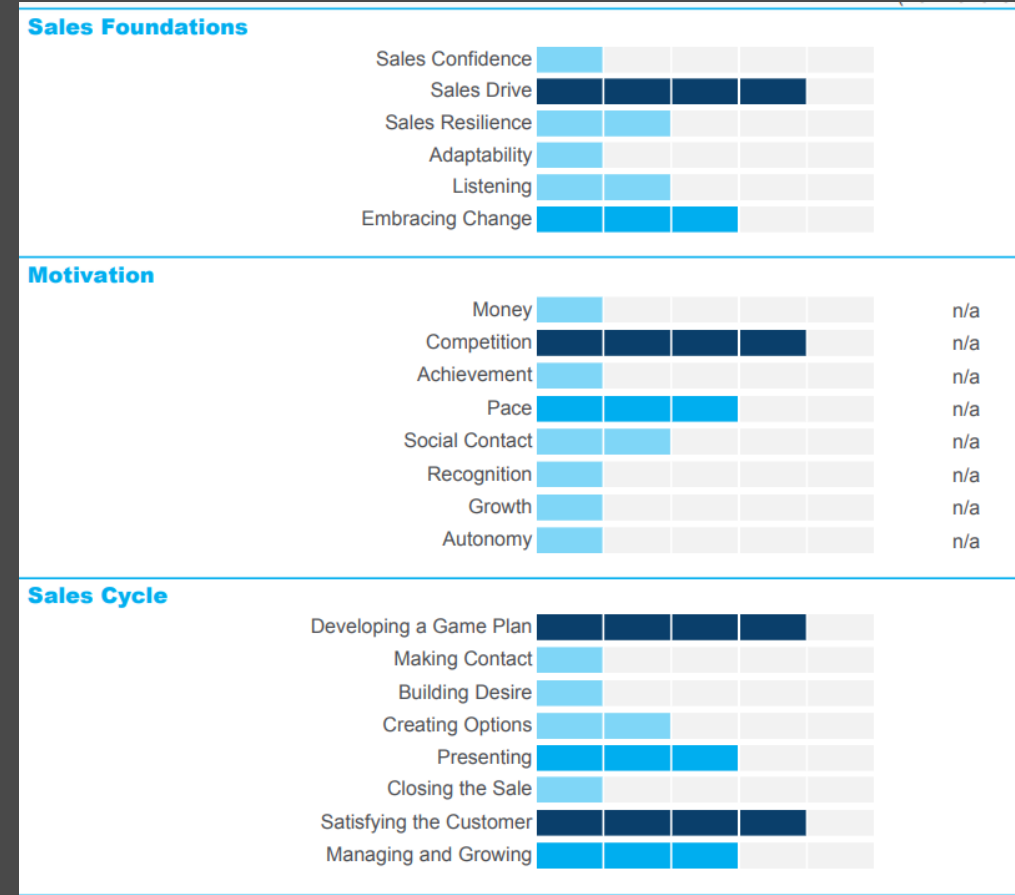
Determine which factors are (less) relevant for the specific role

2

Look at the individual's results: What are the key areas of potential development and strength?

3

Validate potential strengths and probe on possible concerns during the Interview process



Let's start with Step 1

1

Determine which factors are (less) relevant for the specific role

This should always be consistent across all candidates.

Hunter Competencies

From the Sales Foundations:

- Sales Drive
- Sales Resilience

From the Sales Cycle:

- Making Contact
- Closing the Sale

Farmer Competencies

From the Sales Cycle:

- Building Desire
- Creating Options
- Satisfying the Customer
- Managing and Growing the Customer

Let's use the Hunter example, for illustrative purposes

2

Look at the individual's results: What are the key areas of potential development and strength?

Sales Drive

Has drive and enthusiasm, seems hungry for success, and propels oneself to meet tough targets.

Sales Resilience

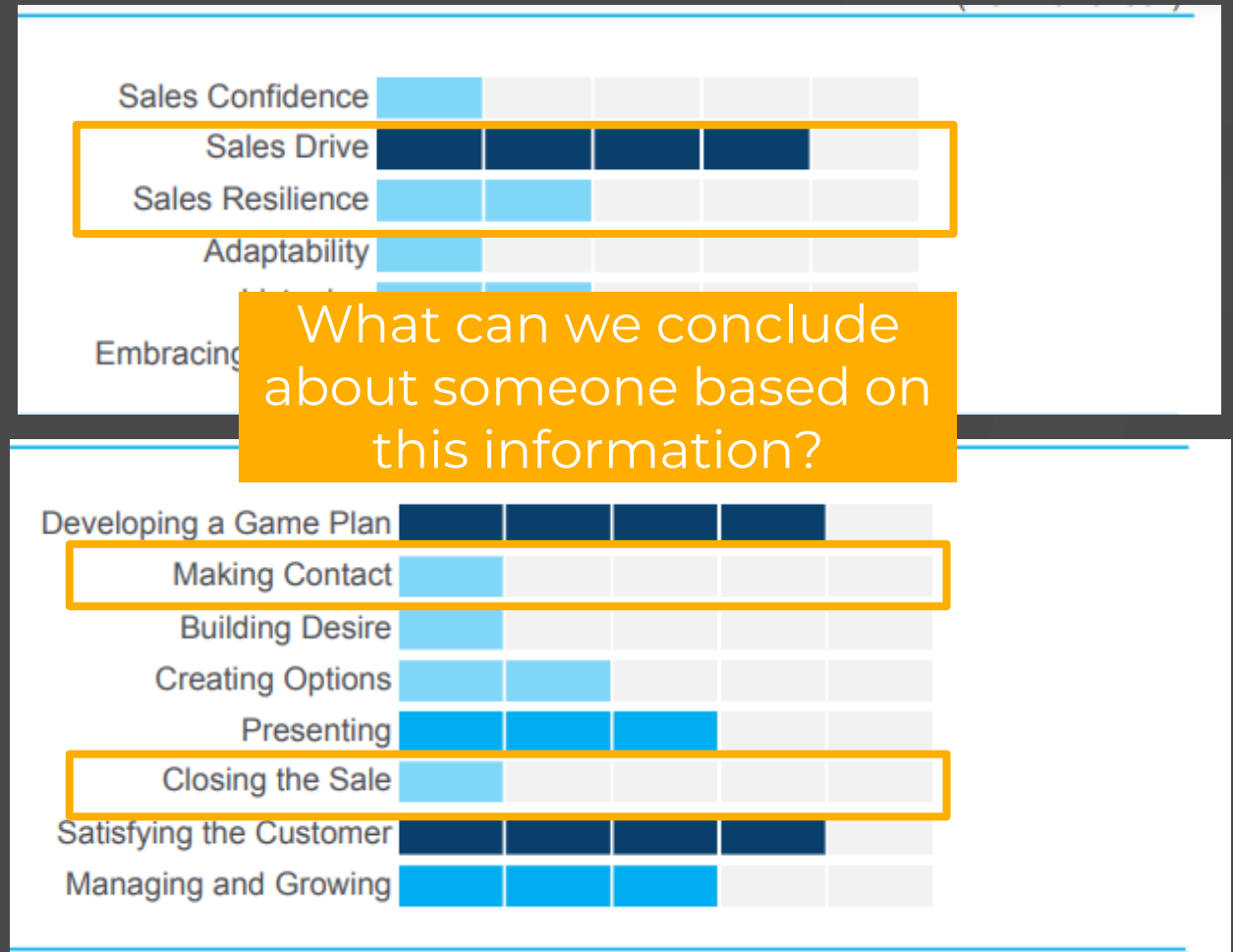
Is full of optimism and very resilient, perseveres in the toughest situations, is on the lookout for new opportunities.

Making Contact

Contacting prospects, 'breaking the ice' and making people feel comfortable, taking the initiative to establish new relationships.

Closing the Sale

Bringing the business home, managing the customer for timely decisions, dealing with objections, negotiating final price and conditions of sale.



3

Validate potential strengths and probe on possible concerns during the Interview process

Structured, competency-based interviews are best practice – candidates can use the STAR method to respond (Situation, Task, Action, Response).

Sales Drive



Definition: Has drive and enthusiasm, seems hungry for success, and propels oneself to meet tough targets.

- People with higher scores are full of energy, determined to take on any goal and any competitor.
- People with lower scores show less energy and determination.

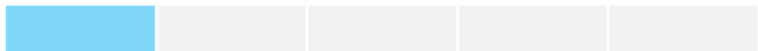
Sales Resilience



Definition: Is full of optimism and very resilient, perseveres in the toughest situations, is on the lookout for new opportunities.

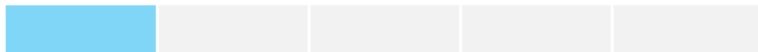
- People with higher scores are optimistic and relaxed even when the going gets rough.
- People with lower scores can be discouraged when things do not go so well.

Making Contact



Contacting prospects, 'breaking the ice' and making people feel comfortable, taking the initiative to establish new relationships.

Closing the Sale



Bringing the business home, managing the customer for timely decisions, dealing with objections, negotiating final price and conditions of sale.

Example Questions

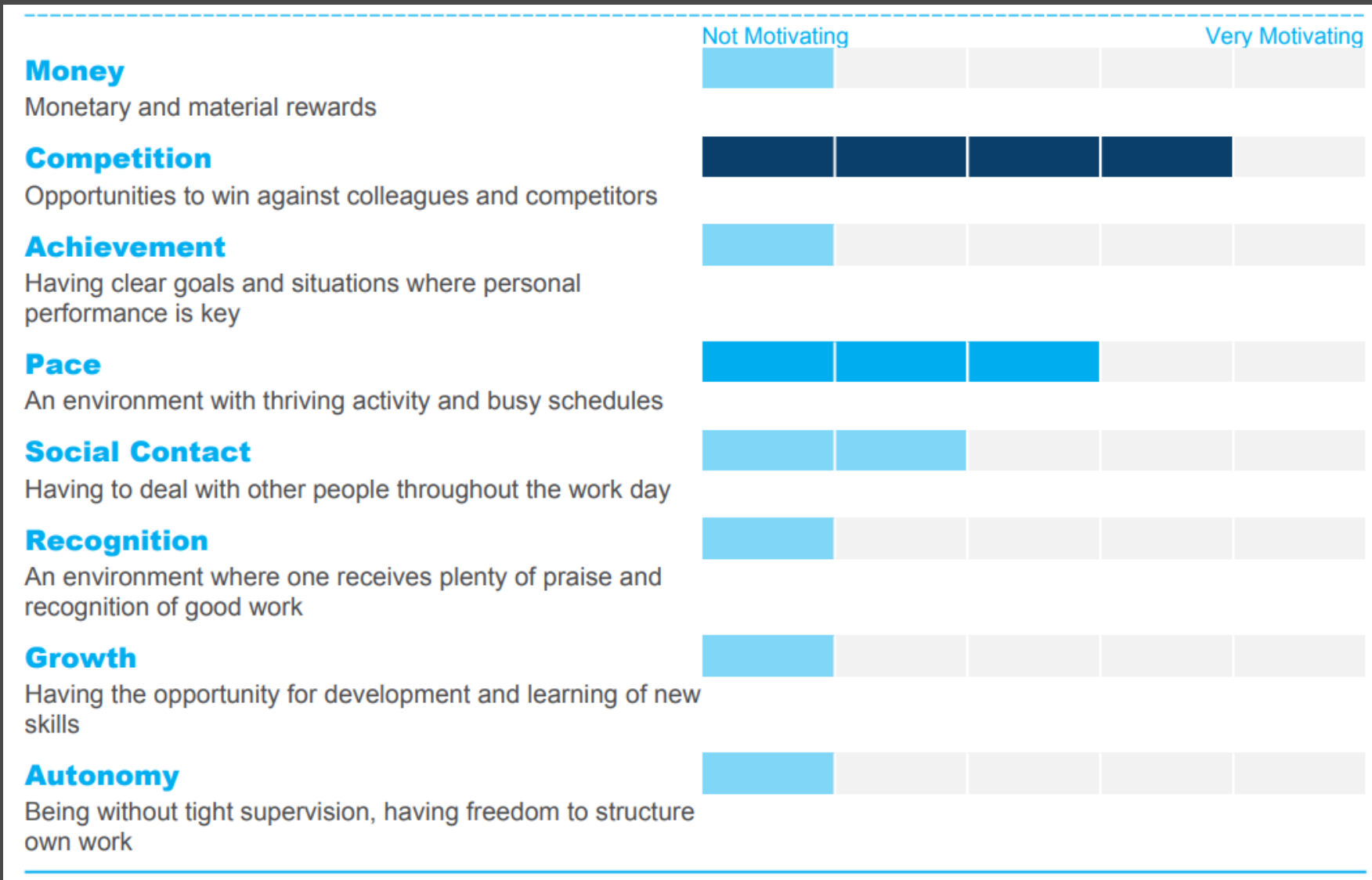
Tell me about a time when you have successfully worked towards an ambitious target?

Describe an example of when you have had to overcome challenges or setbacks in your work?

Tell me about when you have had to establish a new working relationship or partnership?

Provide an example of when you have had to negotiate with someone to reach a desired outcome?

What about looking at motivation – what do you notice?



Can you think of any other ways this information could help us?

Bringing it all together

Summarising the Benefits

Improved Quality of Hire

- CV screening is notoriously biased and contains information that in most cases is NOT predictive of performance.
- The assessments we have discussed here have been rigorously tested to ensure they link to good quality hiring decisions.

Improved Candidate Perceptions

- Using this process means that candidates get a standardised, transparent selection process experience
- When candidates ask for feedback, this process enables us to discuss the specific criteria of focus and why they are included, as well as providing concrete feedback around how they did vs. did not demonstrate this at interview.

Increased Hiring Efficiency and Retention

- These assessments quickly give us key information about candidates to support decision making.
- Candidates who are in an environment that is low fit or not motivating for them are much more likely to leave, impacting retention.

Better Legal Defensibility

- The rigorous nature of these assessments and the way they are used means that we can defend our selection decisions based on assessment against relevant criteria.

Enhanced Ability to Sell the Organisation

- Understanding of what motivates someone helps us to represent our organisation better during the interview process – securing high quality candidates who are likely be weighing up multiple options

A Better Onboarding Experience

- Motivation and behavioural insights give us an immediate starting point for an ongoing development plan, and they help us to understand how to motivate that individual.

Q&A





Thank you

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