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*Managerial Competencies, Sales Management,  
Case Studies*

# Deck for Success

BY DEVON SCHEEF

**WHEN EMPLOYEES GET SHUFFLED  
DURING A REORGANIZATION, HELP  
THEM CHART THEIR FUTURES  
BY DEALING A SPECIAL DECK OF  
CARDS.**

Imagine yourself in this scenario: You've recently been promoted to vice-president of sales. Your first task is to lead your division through a corporate restructuring. You've been charged with trimming the salesforce, refocusing your managers—and gaining a competitive edge in the marketplace. Now what?

When my company, TRW, faced that challenge, the Organization and Human Resource Development Department (OHRD) responded with a process called "success profiling," a strategy devised by Bob Eichinger and Mike Lombardo of the Lominger consulting firm.

Success profiling evolved from research Eichinger and Lombardo conducted while working with the Center for Creative Leadership in Greensboro, North Carolina. It is a process for constructing a composite of the skills and characteristics an individual needs to accomplish a specific job. Success profiles can be applied in many areas, including communicating change and hiring, developing, and training employees.

At TRW, sales directors and managers needed to understand what

they were expected to accomplish and how they could manage effectively within the newly restructured organization.

## **Developing a success profile**

In success profiling, the human resource staff starts the process by gathering information from employees who are knowledgeable about a particular job's challenges and who can offer insights into the characteristics that a person must have to succeed in the job.

At TRW, the OHRD department and I began with the position of sales manager. We asked 16 members of our sales staff, representing all levels from senior management to sales reps, to contribute their ideas.

Each person received a deck of 67 cards; each card listed and briefly described one management characteristic. We asked each participant to sort his or her deck into the following three stacks: characteristics considered essential to the job, characteristics deemed important but not essential, and less important characteristics that would be "nice to have" in a sales manager.

Two stipulations applied: To help respondents set priorities, each of the three stacks had to contain at least 15 cards. Also, respondents had to sort the characteristics based on how they viewed the job's future challenges, as well as current ones, and they had to list the challenges that influenced their decisions.

We analyzed all 16 stacks of cards designating characteristics deemed essential to job performance, along with the lists of challenges. We came up with a list of 13 characteristics that respondents agreed are necessary for sales managers to succeed in the restructured organization. This list became the backbone of the position's success profile, which was drafted in two forms: a list of 13 one-word characteristics and a narrative that expounds on the list.

The next step was to validate the profile. We presented the draft to senior managers in the sales division. Based on their input, we added two characteristics to the profile—the ability to build team spirit and the ability to establish strong relationships with peers. These characteristics were added to balance the independent, goal-oriented focus of the profile.

The final product was a one-page

narrative describing 15 characteristics of successful sales managers. It is a clear, concise explanation of what is now required in the sales division.

### Putting the profile to work

The profile provides a common language and frame of reference for the organization. Here are some ways we use it:

#### Communicating new job requirements.

We used the success profile to explain to managers what would be expected of them during and after the reorganization, which helped alleviate personal anxiety and keep sales managers on a productive track.

Knowing the specific requirements for the position gave sales managers the chance to assess how they felt about the changes and to leave the company if they found the new organization and expectations undesirable.

**Training managers.** The profile serves as the anchor for a sales-management training program. Each module of the three-day training program is designed to help managers acquire or strengthen some characteristic or skill identified in the profile. Managers also learn how their current characteristics and skill levels match the profile.

### Success Profile Cards

Here are samples of some of the cards TRW used in putting together a success profile for sales managers.

#### 1. Action Oriented

Enjoys working hard; is action oriented and full of energy for the things that he or she sees as challenging; is not fearful of acting with a minimum of planning; seizes opportunities when they arise.

#### 2. Dealing With Ambiguity

Can effectively cope with change; can shift gears comfortably; can decide and act without having the total picture; isn't upset when things are "up in the air"; doesn't have to finish things before moving on; can comfortably handle risk and uncertainty.

### The Card Deck: Core Managerial Competencies and Characteristics

- |                                  |  |                                    |
|----------------------------------|--|------------------------------------|
| 1. Action oriented               | 24. Functional or technical skills     | 47. Planning                       |
| 2. Ambiguity (dealing with it)   | 25. Hiring and staffing                | 48. Political savvy                |
| 3. Approachability               | 26. Humor                              | 49. Presentation skills            |
| 4. Boss relationships            | 27. Informing                          | 50. Priority setting               |
| 5. Business acumen               | 28. Innovation management              | 51. Problem solving                |
| 6. Career ambition               | 29. Integrity                          | 52. Process management             |
| 7. Caring about subordinates     | 30. Intellectual "horsepower"          | 53. Results                        |
| 8. Comfort around top management | 31. Interpersonal savvy                | 54. Self-development               |
| 9. Command skills                | 32. Learning "on the fly"              | 55. Self-knowledge                 |
| 10. Compassion                   | 33. Listening                          | 56. Sizing up people               |
| 11. Composure                    | 34. Managerial courage                 | 57. Standing alone                 |
| 12. Conflict management          | 35. Managing and measuring             | 58. Strategic agility              |
| 13. Confronting subordinates     | 36. Motivating subordinates and others | 59. Systems management             |
| 14. Creativity                   | 37. Negotiating                        | 60. Team spirit (ability to build) |
| 15. Customer focus               | 38. Organizational agility             | 61. Technical learning             |
| 16. Decision-making timeliness   | 39. Organizing                         | 62. Time management                |
| 17. Decision quality             | 40. Paradox (dealing with it)          | 63. Total-quality management       |
| 18. Delegation                   | 41. Patience                           | 64. Understanding others           |
| 19. Developing subordinates      | 42. Peer relationships                 | 65. Vision and purpose             |
| 20. Directing subordinates       | 43. Perseverance                       | 66. Work/life balance              |
| 21. Diversity management         | 44. Personal disclosure                | 67. Written communications         |
| 22. Ethics and values            | 45. Personal learning                  |                                    |
| 23. Fairness to subordinates     | 46. Perspective or range of interests  |                                    |

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### Success Profile for a Sales Manager

#### Strategist

- Is action oriented
- Focuses on customers
- Organizes resources
- Solves problems
- Is results oriented

#### Communicator

- Shows command skills
- Maintains composure
- Possesses integrity and earns trust
- Listens well
- Builds peer relationships

#### Mentor

- Builds team spirit
- Effectively confronts subordinates
- Directs subordinates
- Motivates subordinates and others
- Sizes up people well

**Developing managers on the job.** We have found—and formal research confirms—that managers improve their performance more from learning on the job than from learning in the classroom. On-the-job development is designed to strengthen skills

## MANAGERS IMPROVE FROM LEARNING ON THE JOB

through a variety of strategies, such as mentoring and coaching. The success profile keeps the focus on building skills that meet the organization's needs.

**Developing future managers.** We ran a five-day sales management development program designed to build a "bench" of potential managers. As in the management training program, the success profile served as both the basis for the training and as a tool for communication.

Building the program around the profile enabled us to paint a realistic portrait of what it takes to be a successful sales manager. We encouraged

participants to think about whether they would want the role and how it would fit in with their career plans. Participants explored how closely they matched the profile and had opportunities to practice new skills.

**Setting hiring criteria and interviewing job candidates.** The success profile serves as a tool for assessing job candidates. It provides an objective, consistent standard, which makes it easier for multiple interviewers to communicate with each other. The profile enables the sales organization to hire managers who can carry out the specific requirements of the job.

### Lessons learned

Using a success profile invites participation and communication. To improve its value, we plan to start next time by explaining the entire process to the people who hold the positions to be profiled, including the ways the profile will be used. We also plan to involve more employees in building the profiles to learn how different groups of employees evaluate what it takes to succeed in a particular role.

What began as a tool to build a list of management competencies has played a much broader role in realigning our sales organization with a new focus and requirements. The process of building a success profile allowed many employees to contribute and encouraged them to buy in to the new requirements. Also, the profile enabled us to clearly communicate new expectations to the sales organization. We found that the investment of time and effort to build a sales-management success profile continues to pay dividends for both the sales organization and its managers. ■

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