
QUICK VIEW™ SALES ASSESSMENT

TECHNICAL MANUAL

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TABLE OF CONTENTS

Chapter

I.	INTRODUCTION	2
II.	BEHAVIOR DEFINITIONS.....	4
III.	ADMINISTRATION AND SCORING	6
IV.	USES AND APPLICATIONS	9
V.	ASSESSMENT DEVELOPMENT AND VALIDATION	11

Tables

1.	Quick View™ Sales Assessment Benchmark for Territory Sales Reps... ..	11
2.	Correlation of Scores and Number of Units Sold... ..	12
3.	Quick View™ Sales Assessment Benchmark for Technical Sales Professionals.....	12
4.	Correlation of Scores and Performance Group... ..	13
5.	Quick View™ Sales Performance Differentiators: Percent to Plan.....	14
6.	Quick View™ Sales Performance Differentiators: New Opportunities Per Week.....	14
7.	Quick View™ Sales Performance Differentiators: Opportunities Won Per Week.....	15
8.	Quick View™ Sales Performance Differentiators: Customer Visits Per Week	15
9.	Quick View™ Sales Performance Differentiators: Overall Manager Rating... ..	15
10.	Quick View™ Sales Performance Differentiators: Market Platform Rating.....	16
11.	Quick View™ Sales Performance Differentiators: Working Platform Rating... ..	16
12.	Quick View™ Sales Performance Differentiators: Buying Platform Rating.....	16
13.	Quick View™ Sales Behaviors Emphasized Across Performance Metrics.....	17
14.	Performance Differences Based on Scores... ..	17
15.	Adverse Impact Results for Quick View™ Sales Assessment.....	19

CHAPTER I. INTRODUCTION

Philosophy

PRADCO's assessment philosophy is to capture the behaviors and attitudes that are most frequently demonstrated on the job. As with all of PRADCO's assessments, every effort is made to ensure that statements are behavioral and therefore, observable. All response options are positively worded so that people are not required to select negative items to describe themselves. This is done deliberately based on findings from studies done on earlier assessments.

PRADCO assessments are designed in a forced-choice format, minimizing the occurrence of faking or exaggeration and allowing for more accurate scores to be generated.

PRADCO believes that the qualities needed to be successful in one sales context are different from those that might be needed in another setting. In addition, different roles and positions require different skill sets. Further, organizations have individual cultures and unique circumstances that can influence what type of person will succeed there. To make determinations about these issues, PRADCO utilizes a benchmarking process to tailor the Quick View™ Sales Assessment to individual roles and organizations. This allows for the identification of behaviors most critical to success in a specific job. When the appropriate work has been done to establish a benchmark, the Quick View™ Sales Assessment can be used to gain information about people and to compare their scores to those of the most successful incumbents. We also encourage clients to gather data to link Quick View™ Sales Assessment scores with measurable performance outcomes.

About the Quick View™ Sales Assessment

The Quick View™ Sales Assessment measures factors critical to success in sales roles across a variety of work settings. Thirty-two behaviors are assessed through a series of 240 pairs of behavioral statements. People complete the measure by selecting the statement in each item pair that best describes their behavior. Since every statement reflects a favorable work behavior, the person must make a choice between two (2) equally desirable items. This forced-choice format reveals the behaviors or attitudes that an individual emphasizes most and is likely to display at work.

The Quick View™ Sales Assessment is used several ways:

- (1) As an interview tool for job applicants
- (2) As part of a larger battery to comprehensively assess job candidates
- (3) As a tool to assess the training needs of current employees
- (4) To identify critical success factors for a job
- (5) As a basis for generating follow up questions to probe job-relevant behaviors
- (6) As a basis for generating developmental suggestions that maximize new-hire success

Scores on each behavior are expressed as percentiles that indicate someone's relative standing in a group of peers. For example, out of 100 people, a candidate who scores at the 94th percentile on *Tenacity* has scored higher than 93 of 100 individuals who have taken the assessment. The norms are based on a broad population of individuals who take the Quick View™ Sales Assessment. Norms are updated on a regular basis to reflect current population trends.

This manual provides an in-depth description of the Quick View™ Sales Assessment, including behaviors measured, administration and scoring procedures, uses and applications, and further information about the assessment's development and validation.

CHAPTER II. BEHAVIOR DEFINITIONS

Based on years of experience assessing people, previous research studies conducted by PRADCO, and a review of relevant literature, 32 behaviors were identified as being related to successful performance as a salesperson or sales manager. These behaviors reflect actions displayed by employees performing at or above expectations in a variety of roles and work settings, and are defined as follows:

Quick View™ Sales

INDIVIDUAL QUALITIES

Motivation

SALES FOCUS:	Identifying with the sales role and enjoying the selling process.
DRIVE:	Being aggressive, hardworking, and money motivated.
SERVICE:	Listening to people and responding to their needs.
GOAL DRIVEN:	Setting and achieving challenging goals.
AMBITION:	Wanting more responsibility and seeking advancement.

Work Approach

RESULTS:	Meeting commitments and being personally productive.
QUALITY:	Paying attention to detail and working with accuracy.
PROACTIVE:	Taking independent action to move things forward.
FLEXIBILITY:	Adjusting to change and adapting to different circumstances.
TIME MANAGEMENT:	Prioritizing and making good use of time.

Resilience

OPTIMISM:	Having an expectation that things will turn out well.
CONFIDENCE:	Believing one can master life's challenges.
TENACITY:	Being determined, persistent, and able to overcome setbacks.

INTERACTIONS WITH PEOPLE

Building Relationships

ATTITUDE:	Having a positive disposition toward people.
SELF AWARENESS:	Being introspective and aware of own thoughts and feelings.
EVEN TEMPERED:	Maintaining emotions and composure in all situations.
BUILDING TRUST:	Inspiring trust and credibility with others.
RELATING TO OTHERS:	Building and maintaining positive relationships.
VERSATILITY:	Understanding and adapting to different people's styles.

Supporting Others

EMPATHY:	Identifying with and responding to emotions in others.
COURTESY:	Being considerate and treating people respectfully.
TEAMWORK:	Being cooperative and working closely with others.

Influencing People

INSIGHT:	Sizing up customers and perceiving their thoughts and reactions.
COMMUNICATIVE:	Sharing information regularly and in a clear manner.
LISTENING:	Paying attention and really hearing what people say.
PERSUASIVE:	Influencing people in a convincing fashion.

DECISION MAKING

Quality of Decisions

ORGANIZATIONAL AWARENESS:	Identifying interpersonal and cultural dynamics.
STRATEGIC:	Planning and anticipating future implications.

RESOURCEFUL:	Finding solutions and new ways to handle problems.
OBJECTIVITY:	Evaluating situations from a logical, realistic viewpoint.
INTEGRITY:	Being forthright, honest, and demonstrating ethical standards.
JUDGMENT:	Analyzing situations effectively and making sound decisions.

CHAPTER III. ADMINISTRATION AND SCORING

Administration

The Quick View™ Sales Assessment can be taken on a desktop computer or mobile device. Standard instructions are provided. The items consist of two (2) statements describing work-related behaviors. Individuals must select which of the two statements best describes them. There are 240 item pairs, and people work at their own pace. Administration time is approximately 30 minutes.

The assessment is available online through our testing site. To maintain security, clients are issued a username and an access code to administer the assessment to someone, and a separate code is issued to the individual authorized to retrieve scores as well as the person taking the assessment.

Once test-takers have completed the assessment, a computerized report containing the results is emailed to the individual(s) designated by the client to receive results. The report includes the candidate's scores on each of the 32 behaviors, their score on a performance benchmark if the organization has established one, a set of 12 computer-generated follow up questions, and a set of six (6) computer-generated developmental suggestions.

Scoring

For each of the 32 behaviors measured by Quick View™ Sales Assessment, candidates receive a percentile score, ranging from 1-99, that is derived from a norm base consisting of thousands of people who have taken the assessment previously. Scores are classified into one of three ranges based on previous studies conducted by PRADCO:

- High scores (71st – 99th percentile) are probable strengths and represent behaviors that the person frequently demonstrates on the job.
- Moderate scores (30th – 70th percentile) are typically positive and represent behaviors that the person occasionally demonstrates on the job.

- Low scores (1st–29th percentile) may indicate developmental needs or represent behaviors that are less relevant to the person's current job.

In many cases, it is useful to develop a benchmark of success for a sales role. Benchmarking is a way to sharpen the focus of the Quick View™ Sales Assessment to make it relevant to a specific job and its unique demands. The benchmarking process yields a subset of approximately ten (10) to twelve 12 behaviors that are most predictive of successful outcomes in the organization. There are three types of benchmarking approaches PRADCO utilizes:

- **Validation Study (Recommended option)**
 - A work group or large sample of employees in a job is identified to complete the Quick View™ Sales Assessment
 - The participating organization provides existing performance metrics to indicate the success of job incumbents (rating forms can be provided)
 - Analyses are conducted to show which behaviors are most related to performance
 - Performance on the Quick View™ Sales Assessment is statistically connected to current employee performance, providing evidence of validity
- **Contrast Analysis (When a full validation is not feasible)**
 - Top and bottom groups of employees are identified based on performance
 - Employees in these groups complete the Quick View™ Sales Assessment
 - TalentScan scores are compared for the two (2) groups to identify behaviors that differentiate top and bottom performers in the organization, such that top performers score higher on average than bottom performers
 - Additional behaviors are included in the benchmark when average scores are high for both groups, as this can be indicative of a culture fit characteristic
- **Focus Group (When a contrast analysis is not feasible)**
 - Subject matter experts are identified to discuss important aspects of the job being benchmarked, including key success characteristics and potential derailers
 - Critical themes from the discussion are linked to PRADCO behaviors

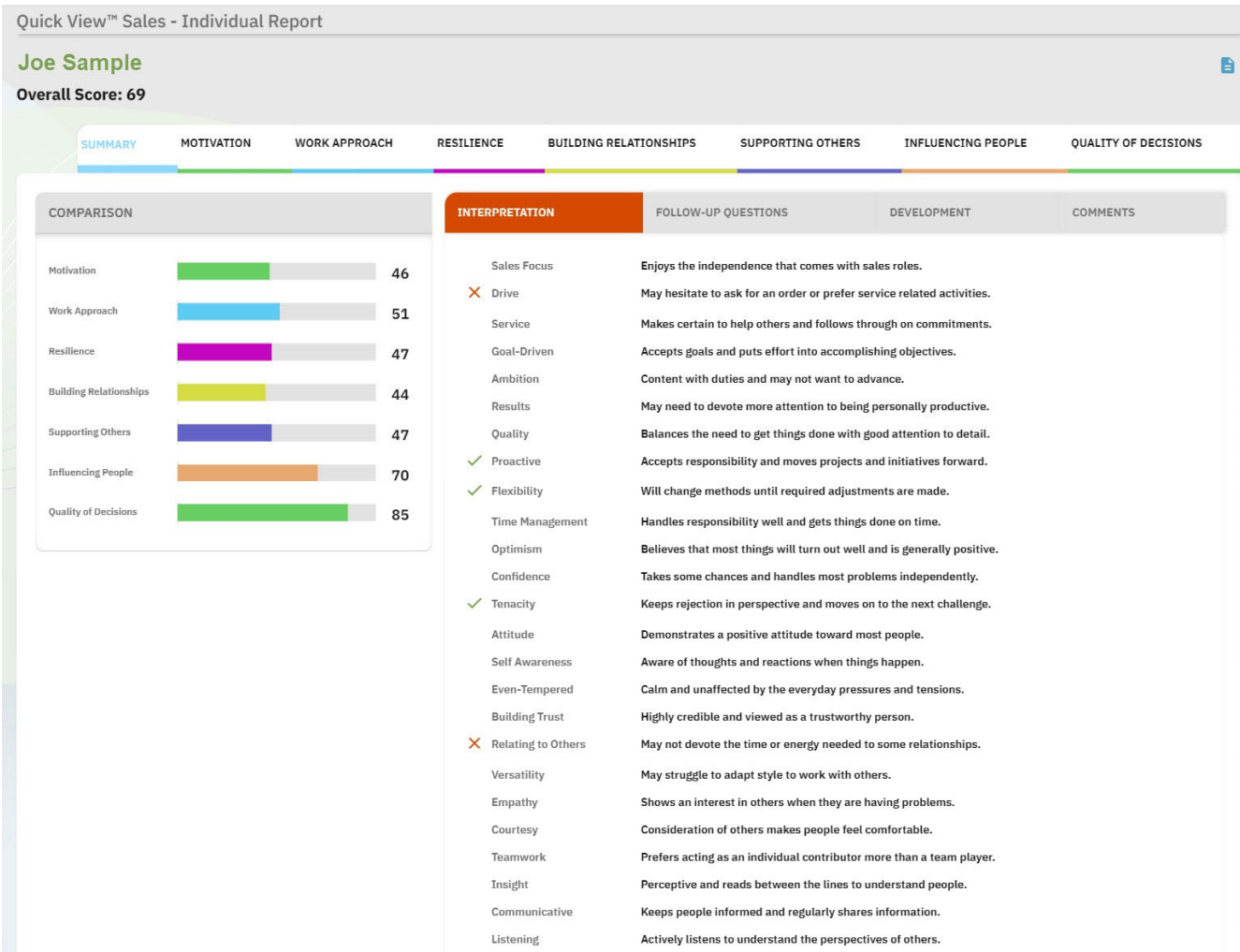
Each behavior chosen for the benchmark is assigned a target range (e.g., 50-99) that constitutes hitting the benchmark for that specific behavior.

Once a benchmark is established, people also receive a score, which typically ranges from 1-100. Each behavior included in the benchmark receives equal weighting toward the overall score. Candidates can:

- Gain points for scoring within the established target range for a given benchmark behavior (maximum points) or for scoring within the moderate range (i.e. 30 and above) but not within the target range (partial points)
- Lose points for scoring especially low on a benchmark behavior (i.e. 15 and below)

- Neither gain nor lose points for scoring outside of the ranges outlined above

A sample benchmark page and score are below:



CHAPTER IV. USES AND APPLICATIONS

As an Interview Tool for Job Applicants

The Quick View™ Sales Assessment can assist hiring professionals in determining if a candidate merits further consideration in the selection process. The assessment can be used for any sales position, including those with direct management responsibility and those that require the ability to sell, provide service, or manage accounts. Used in this way, the Quick View™ Sales Assessment provides considerable value in streamlining the selection process. It enables hiring managers to focus their interviewing around candidate strengths and weaknesses. When the Quick View™ Sales Assessment is used as a screening tool, a benchmark study is recommended.

As Part of a Larger Test Battery

The Quick View™ Sales Assessment makes an important contribution to a larger battery of tests used for higher-level roles. In combination with personality inventories, questionnaires, specific skill measures, and other assessments, the Quick View™ Sales Assessment adds information about influencing style, decision-making approach, and client management practices. This is helpful in evaluating people for sales professional and leadership positions in all industries by adding critical data about factors that are essential for success on the job.

To Assess Training Needs

The Quick View™ Sales Assessment provides a variety of scores on behaviors. The pattern of scores illustrates an individual's areas of strength and weakness. Knowledge of these patterns will enable supervisory staff to provide the necessary training and coaching to help a person improve. The scores can also be shared with people in structured feedback sessions to provide insight into their behavior and facilitate developmental discussions. The Quick View™ Sales Assessment can be administered to groups to identify the collective strengths and deficiencies of a sales department.

To Identify Critical Success Factors

PRADCO has developed a benchmark-building process to enhance the effectiveness and utility of its assessments. By administering the Quick View™ Sales Assessment to samples of employees currently working in a job, score patterns can be identified to create a benchmark that characterizes successful performance. Comparing future candidates to this benchmark helps determine which candidates are most likely to meet and exceed expectations.

To Generate Follow Up Questions

Follow-up questions are computer-generated for every Quick View™ Sales Assessment report. When a benchmark is established, these questions are pulled from the benchmark behaviors a person scores lowest on. Otherwise, questions are taken from behaviors across the assessment that people gave the least emphasis to. By probing into areas in which individuals score low, the interviewer can gain behavioral incidents that provide evidence for how a person is likely to handle relevant, job-related experiences. In addition to the questions provided, other questions can be easily constructed using the behavioral descriptions provided for each score. We generally recommend a two-fold approach, whereby interviewers probe deeper into behaviors with lower scores while confirming behaviors with higher scores.

To Generate Developmental Suggestions

Developmental suggestions are also provided for every Quick View™ Sales Assessment report, using the same criteria referenced above with regard to follow up questions. Each report contains suggestions pertinent to six (6) behaviors on the assessment. For each behavior, a brief description of the behavior's significance to sales effectiveness is followed by a set of three (3) suggestions that are specific, actionable, and measurable. We recommend providing this portion of the report to newly hired or current employees, as the suggestions are written directly to them.

CHAPTER V. ASSESSMENT DEVELOPMENT AND VALIDATION

Assessment Development Process

The Quick View™ Sales Assessment was designed to bring together two (2) forced-choice assessments that PRADCO had previously administered to candidates for sales positions: the *Sales Index* and the *Emotional Intelligence Index*. Combining these measures into a single tool increased its validity as a sales assessment tool in three (3) ways. First, it enabled us to use a forced-choice format to see whether candidates for sales roles tend to emphasize behaviors that are service and sales-oriented as opposed to behaviors that are more indicative of success as an individual contributor. Research has consistently identified an inability to shift from an individual-contributor mindset as an obstacle to sales effectiveness. The Quick View™ Sales Assessment is capable of detecting this mindset, whereas this was not possible when our Indexes kept individual contributor behaviors separate from sales behaviors.

Second, combining the measures led to the elimination of redundant behaviors that appeared on more than one Index. For instance, whereas similar items were used to measure *Initiative* on the *Sales Index* and *Proactive* on the Emotional Intelligence Index, the two (2) behaviors have now been consolidated into a single *Proactive* behavior on the Quick View™ Sales Assessment.

Finally, eliminating redundant behaviors created room for the addition of new behaviors that have emerged as essential characteristics of sales effectiveness. Examples of this include *Time Management*, *Versatility*, and *Strategic*.

New items were written and tested for the behaviors that had not previously appeared in PRADCO assessments. Meanwhile, items for pre-existing behaviors were carried over into this assessment and paired with one another in a way that enabled new behavior items to be appropriately integrated. The end result was a list of 32 behaviors represented by 240 item pairs.

Item Format

To minimize the risk of bias, a forced-choice format was maintained with the Quick View™ Sales Assessment. Historically, self-report instruments have been susceptible to several types of bias. First, individuals may consciously attempt to present themselves in an overly positive light to create a good impression. This can lead to impressions about them that are not entirely true. Secondly, candidates may try to sway their responses to create a pattern that they believe the employee desires. For example, if a job requires working at a fast pace, candidates may consistently endorse items that show quick thinking even though this is not an accurate description of their behavior. To address these potential problems, the forced-choice format was used. People evaluate two (2 statements and indicate which is most like them. It is difficult for a person to choose the most desirable response to a question because both alternatives are positive. Secondly, statements from one behavior are randomly paired with statements from other behaviors so that it is difficult for people to consistently endorse one(1) behavior they believe the organization values.

Validity/ROI Evidence

Multiple studies have been conducted to assess the relationship between Quick View™ Sales Assessment behaviors and sales-related outcomes. Several of these studies are outlined below as a means of establishing validity and ROI across various types of sales roles.

Territory Sales Representatives – Fundraising Organization

The effectiveness of the Quick View™ Sales Assessment for predicting sales was tested by comparing the scores of 22 sales professionals on a pre-established benchmark to the number of units they sold in the first year after training. The benchmark that was used to calculate the scores is shown in **Table 1**. It was established by comparing the average scores of 11 Territory Sales Representatives who exceeded (Tier 1), met (Tier 2), and fell below (Tier 3) expectations one year prior to the group of sales professionals that were being used to validate the instrument.

Table 1. Quick View™ Sales Assessment Benchmark for Territory Sales Reps

Behavior		Definition	Group Average		
		INDIVIDUAL QUALITIES	Tier 1	Tier 2	Tier 3
			N=3	N=4	N=4
		<u>Motivation</u>			
Sales Focus		Identifying with the sales role and enjoying the selling process.	83	39	78
Drive *		Being aggressive, hardworking and money motivated.	60	60	48
Service *		Listening to people and responding to their needs.	68	59	76
Goal Driven □		Setting and achieving challenging goals.	77	63	29
Ambition		Wanting more responsibility and seeking advancement.	78	59	53
		<u>Work Approach</u>			
Results		Meeting commitments and being personally productive.	23	50	50
Quality		Paying attention to detail and working with accuracy.	38	57	57
Proactive □		Taking independent action to move things forward.	63	46	22
Flexibility		Adjusting to change and adapting to different circumstances.	80	41	66
Time Management □		Prioritizing and making good use of time.	77	87	48
		<u>Resilience</u>			
Optimism *		Having an expectation that things will turn out well.	71	64	87
Confidence		Believing one can master life's challenges.	60	67	67
Tenacity		Being determined, persistent and able to overcome setbacks.	57	57	81
		INTERACTIONS WITH PEOPLE			
		<u>Building Relationships</u>			
Attitude *		Having a positive disposition toward people.	87	87	83
Self Awareness *		Being introspective and aware of own thoughts and feelings.	63	63	63
Even Tempered		Maintaining emotions and composure in all situations.	76	53	82
Building Trust □		Inspiring trust and credibility with others.	80	51	31
Relating to Others		Building and maintaining positive relationships.	49	65	81
Versatility		Understanding and adapting to different people's styles.	39	78	72
		<u>Supporting Others</u>			
Empathy *		Identifying with and responding to emotions in others.	62	88	68
Courtesy		Being considerate and treating people respectfully.	91	73	86
Teamwork		Being cooperative and working closely with others.	55	65	44
		<u>Influencing People</u>			
Insight		Sizing up customers and perceiving their thoughts and	51	59	76
Communicative		Sharing information regularly and in a clear manner.	32	76	68
Listening *		Paying attention and really hearing what people say.	78	78	72
Persuasive		Influencing people in a convincing fashion.	24	50	84
		DECISION MAKING			
		<u>Quality Decisions</u>			
Organizational Awareness		Identifying interpersonal and cultural dynamics.	40	32	40
Strategic		Planning and anticipating future implications.	22	28	35
Resourceful		Finding solutions and new ways to handle problems.	24	65	57
Objectivity		Evaluating situations from a logical, realistic viewpoint.	46	72	30
Integrity □		Being forthright, honest, and demonstrating ethical standards.	73	41	41
Judgment		Analyzing situations effectively and making sound decisions.	17	22	56

✓ Recommended Benchmark Behaviors Based on Top/Bottom Group Differences

* Recommended Benchmark Behaviors Based on Overall High Scores

Amongst the 22 employees in the validation sample, five (5) obtained an average score below 60 and sold an average of 29,149 units in their first full year after training. This was in contrast to employees scoring 60 or above on the benchmark, who sold an average of 54,640 units. The resulting average difference was 25,491 units, which had an average profit margin of approximately \$4/unit. In other words, existing employees who scored a 60 or above on the Quick View™ Sales Assessment as part of their hiring process were now producing, on average, \$101,964 in additional sales when compared to counterparts who scored below a 60. This positive difference was further supported by a statistically significant correlation between scores and number of units sold, such that higher scores on the Quick View™ Sales Assessment were associated with a greater number of units sold. **Table 2** reports the correlation that was found.

Table 2. Correlation of Scores and Number of Units Sold

	Correlation	Statistical Significance
Scores and Number of Units Sold	.443	p < .05

Note. N = 22.

Technical Sales Professionals – Engineered Solutions in Aerospace Industry

Forty Technical Sales Professionals were asked to complete the Quick View™ Sales Assessment as part of a benchmarking process for an upcoming training program. Each employee's manager then categorized them as a top, middle, or bottom performer. Average scores of the top and bottom-performing groups were then compared to recommend the benchmark listed in **Table 3**.

Table 3. Quick View™ Sales Assessment Benchmark for Technical Sales Professionals

Sales Behavior		Definition	Group Average	
			High n=12	Low n=10
		INDIVIDUAL QUALITIES		
		<u>Motivation</u>		
Sales Focus ☐	Identifying with the sales role and enjoying the selling process.		48	34
Drive ☐	Being aggressive, hardworking, and money motivated.		18	27
Service ☐	Listening to people and responding to their needs.		60	51
Goal Driven ☐	Setting and achieving challenging goals.		38	22
Ambition ☐	Wanting more responsibility and seeking advancement.		83	72
		<u>Work Approach</u>		
Results ☐	Meeting commitments and being personally productive.		48	30
Quality ☐	Paying attention to detail and working with accuracy.		75	57
Proactive ☐	Taking independent action to move things forward.		79	24
Flexibility ☐	Adjusting to change and adapting to different circumstances.		87	60
Time Management ☐	Prioritizing and making good use of time.		54	38

	<u>Resilience</u>		
Optimism	Having an expectation that things will turn out well.	64	64
Confidence	Believing one can master life's challenges.	46	46
Tenacity	Being determined, persistent, and able to overcome setbacks.	40	48
INTERACTIONS WITH PEOPLE			
	<u>Building Relationships</u>		
Attitude□	Having a positive disposition toward people.	76	60
Self Awareness	Being introspective and aware of own thoughts and feelings.	73	65
Even Tempered	Maintaining emotions and composure in all situations.	67	67
Building Trust*	Inspiring trust and credibility with others.	75	86
Relating to Others	Building and maintaining positive relationships.	32	64
Versatility	Understanding and adapting to different people's styles.	30	46
	<u>Supporting Others</u>		
Empathy	Identifying with and responding to emotions in others.	61	83
Courtesy*	Being considerate and treating people respectfully.	85	85
Teamwork	Being cooperative and working closely with others.	68	77
	<u>Influencing People</u>		
Insight	Sizing up customers and perceiving their thoughts and reactions.	46	63
Communicative	Sharing information regularly and in a clear manner.	49	49
Listening	Paying attention and really hearing what people say.	56	82
Persuasive	Influencing people in a convincing fashion.	22	36
DECISION MAKING			
	<u>Quality of Decisions</u>		
Org. Awareness	Identifying interpersonal and cultural dynamics.	59	49
Strategic	Planning and anticipating future implications.	43	43
Resourceful□	Finding solutions and new ways to handle problems.	88	64
Objectivity	Evaluating situations from a logical, realistic viewpoint.	67	86
Integrity*	Being forthright, honest, and demonstrating ethical standards.	81	81
Judgment	Analyzing situations effectively and making sound decisions.	55	72

✓ Recommended Behaviors Based on Top/Bottom Differences

* Recommended Behaviors Based on Overall High Scores

Using this benchmark, scores were then calculated for each employee. As the significant correlation in **Table 4** illustrates, sales professionals scoring higher on the Quick View™ Sales Assessment were more likely to be placed in the high-performing group by their manager.

Table 4. Correlation of Scores and Performance Group

	Correlation	Statistical Significance
Scores and Performance Group	.468	p < .01

Note. N = 40

Account Managers – International Industrial Manufacturer

Twenty-two Account Managers for an international industrial manufacturer took the Quick View™ Sales Assessment and a benchmark was created by selecting Quick View™ Sales Assessment behaviors that consistently predicted fit with culture or performance outcomes. Once a benchmark was developed, scores were calculated for each employee. A final comparison was done that illustrated an advantage in terms of performance metrics for those scoring 60 or above on the benchmark as opposed to those who scored below a 60. **Tables 5-14** show Quick View™ Sales behaviors that emerged as important for each outcome metric, while **Table 12** provides the recommended benchmark and **Table 13** illustrates key performance differences.

Table 5. Quick View™ Sales Assessment Performance Differentiators: Percent to Plan

Behavior	Percent to Plan	
	Top Performers (125.3%)	Bottom Performers (99.3%)
Proactive	73	58
Flexibility	75	43
Tenacity	65	48
Relating to Others	47	32
Organizational Awareness	59	33
Judgment	94	72

Table 6. Sales Performance Differentiators: New Opportunities Per Week

Behavior	New Opportunities Per Week	
	Top Performers (1.34)	Bottom Performers (.41)
Proactive	79	49
Flexibility	81	68
Relating to Others	64	40
Persuasive	61	45
Building Trust	86	68
Ambition	65	52

Table 7. Sales Performance Differentiators: Opportunities Won Per Week

Opportunities Won Per Week		
Behavior	Top Performers (.280)	Bottom Performers (.054)
Proactive	73	49
Drive	44	32
Tenacity	65	48
Persuasive	61	36
Organizational Awareness	68	33
Judgment	86	86

Table 8. Sales Performance Differentiators: Customer Visits Per Week

Customer Visits Per Week		
Behavior	Top Performers (9.77)	Bottom Performers (6.14)
Relating to Others	56	40
Persuasive	61	36
Judgment	79	72
Service	69	33
Insight	78	62
Objectivity	81	67

Table 9. Sales Performance Differentiators: Overall Manager Rating

Overall Manager Rating (1-5)		
Behavior	Top Performers (4.29)	Bottom Performers (2.71)
Flexibility	81	52
Tenacity	80	48
Relating to Others	56	40
Persuasive	61	45
Organizational Awareness	59	26
Judgment	86	64

Table 10. Sales Performance Differentiators: Market Platform Rating

Market Platform Rating (1-5)		
Behavior	Top Performers (4.28)	Bottom Performers (1.43)
Flexibility	87	52
Tenacity	65	40
Judgment	86	72
Confidence	62	30
Time Management	70	38
Objectivity	91	74

Table 11. Sales Performance Differentiators: Working Platform Rating

Working Platform Rating (1-5)		
Behavior	Top Performers (4.00)	Bottom Performers (2.57)
Drive	44	32
Proactive	79	49
Flexibility	75	60
Persuasive	61	45
Judgment	91	64
Confidence	69	30

Table 12. Sales Performance Differentiators: Buying Platform Rating

Buying Platform Rating (1-5)		
Behavior	Top Performers (4.71)	Bottom Performers (2.71)
Drive	50	37
Tenacity	73	48
Persuasive	75	45
Organizational Awareness	68	41
Judgment	86	72
Sales Focus	80	55

Table 13. Quick View™ Sales Assessment Behaviors Emphasized across Performance Metrics

Behavior	Definition
Drive	Being aggressive, hardworking, and money-motivated.
Proactive	Taking independent action to move things forward.
Flexibility	Adjusting to change and adapting to different circumstances.
Tenacity	Being determined, persistent, and able to overcome setbacks.
Relating to Others	Building and maintaining positive relationships.
Persuasive	Influencing people in a convincing fashion.
Organizational Awareness	Identifying interpersonal and cultural dynamics.
Objectivity	Evaluating situations from a logical, realistic viewpoint.
Integrity	Being forthright, honest, and demonstrating ethical standards.
Judgment	Analyzing situations effectively and making sound decisions.

Table 14. Performance Differences Based on Score

	Percent to Plan	New Opportunities	Won Opportunities	Customer Visits	Overall Manager Rating	Market Platform Rating	Working Platform Rating	Buying Platform Rating
Score 60-99	115.7%	.921	.205	8.20	3.92	2.79	3.43	4.07
Score 59-00	107.7%	.663	.096	7.66	2.87	2.75	2.75	3.25
	+7.4%	+38.9%	+113.5%	+6.6%	+36.6%	+1.4%	+24.7%	+25.2%

Overall, there was strong and consistent evidence supporting the Quick View™ Sales Assessment as a predictor of effectiveness across performance categories for Account Manager candidates. Specifically, favorable scores were associated with more effective performance on several outcomes of interest to the organization.

Fairness Evidence

Assessments are determined to be fair when demographic factors such as gender and age are statistically shown to have no bearing on the rate at which people achieve passing scores. The statistical analysis for this is commonly referred to as adverse impact analysis. Several methods for determining the absence or presence of adverse impact have been used in court proceedings

where the fairness of an assessment was in question. Thus, a robust analysis whereby several calculations yield a similar finding of no adverse impact is the current industry standard.

To assess the Quick View™ Sales Assessment for adverse impact, we utilized a spreadsheet from adverseimpact.org that provides the following five (5) calculations for adverse impact:

- The Four-Fifths Rule
 - The simplest and most common way of assessing for adverse impact
 - The group with the lower selection rate (e.g., seven (7) out of ten (10) passed = 70% selection rate) still has a selection rate that is at least 80% as high as that of the group with the higher selection rate
 - This test has the most likelihood of concluding adverse impact exists when it does not
- The Rule of One
 - Retests the four-fifths rule assuming that one (1) more person from the minority group was hired while one (1) more person from the majority group was not hired
 - When this retest causes the selection rate ratio to cross the 80% threshold, it can be concluded that any adverse impact finding is likely due to small sample sizes
- Fisher's Exact
 - Statistically assesses whether the selection rate difference between the two (2) groups is too large to be due to chance
- Chi Square
 - Determines whether the observed selection rate for a minority group is statistically lower than the expected selection rate, based on how the majority group fared
- Z Ratio
 - Evaluates statistically whether the selection ratios of two (2) groups are similar enough to come from a single group (no adverse impact) or large enough to signify independent groups (adverse impact)

The Quick View™ Sales Assessment does not independently yield a determination of whether or not a candidate has “passed,” even when a benchmark is being used. Nevertheless, establishing the absence of adverse impact is important from a test fairness standpoint. Thus, for the sake of this analysis, we established a cut score whereby candidates obtaining a score of 60 or above were regarded as passing the assessment, while candidates obtaining a score of 59 or below were regarded as failing the assessment. This is in keeping with our general counsel to clients that candidates scoring at or above a 60 on the assessment can be viewed as fitting the benchmark reasonably well relative to those who score below a 60.

Candidates taking our assessments can opt to provide demographic information regarding their gender and/or race, providing us the data we need to establish test fairness across these categories. As the results in **Table 15** show, there is no evidence of adverse impact on the basis of gender or race for the Quick View™ Sales Assessment across any of the measures of adverse impact that were deployed. Thus, the Quick View™ Sales Assessment appears to be a fair assessment that does not contain bias on the basis of gender or race.

Table 15. Adverse Impact Results for Quick View™ Sales Assessment

	Sales TalentScan Score		Evidence of Adverse Impact				
	60 or Above	Below 60	4/5 Rule	Rule of 1	Fisher's Exact	X ²	Z Ratio
Gender							
Male	391	256	----	----	----	----	----
Female	152	116	NO	NO	NO	NO	NO
Race							
White	453	303	----	----	----	----	----
African American	34	31	NO	NO	NO	NO	NO
Hispanic	22	19	NO	NO	NO	NO	NO
Asian	12	6	NO	NO	NO	NO	NO

† Based on 915 candidates who completed the Sales TalentScan assessment and opted to identify gender/race

Summary

The research studies presented above provide support for the reliability and validity of the Quick View™ Sales Assessment. The Quick View™ Sales Assessment can be used as a measure of an individual's ability to perform as a sales professional in a broad range of organizations and sales contexts. Once an effort is made to understand the competencies required to perform any given job well, a specific subset of behaviors can be used from the Quick View™ Sales Assessment to identify those who are most likely to perform best on the job.