**SMARTtools for Leaders™**

**Reference Interview for the role:** VP of Sales

**Reference: Gerald Rodgers** (CEO of TLY Consulting Group, her current employer, with permission from Karen Tan)

**Candidate:** Karen Tan **Interviewer:** Morgan Jones

**Date**: 9/20/2016 **Recommendation:** Proceed

**Rating and Comments (A, B,C):** A+

**Summary:** I’m impressed that Karen was transparent and open about her job search with her current boss. It’s unusual. But Gerald Rodgers has such respect for Karen, and he’s not going anywhere any time soon, so he is willing to serve as a reference, so Karen can continue to grow in her career.

His summary was that she is “the single greatest hire I’ve ever made. Big revenue growth. Big EBITDA growth. She built an amazing team. And she was an absolute joy to work with.” Wow!

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| **CONTEXT** |
| ***How do you know the candidate?*** | * I was a client of hers when she worked at Softcorp, oh, about 6 years ago. I was so impressed with her, I hired her to TLY Consulting Group to grow our software division four years ago.
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| **STRENGTHS** | **AREAS FOR IMPROVEMENT BACK THEN** |
| 1. Just a really neat person—humble, confident, and very good EQ skills—she reads people very well.
2. One of the best recruiters of talent I’ve ever seen. She really knows how to attract the best and the brightest, treat them well, and retain them.
3. She’s aggressive in finding the right customers to sell to. We had her meeting mostly with existing consulting clients, to turn them into software clients. She knew which ones to focus on, and which ones to pass on.
4. I think she can become a President or CEO one day. She has the full skill-set of being able to prioritize, hire a great team, and build relationships that get results. She’s on the succession plan here, but I’m not going anywhere anytime soon.
 | 1. She tortures the CTO and development folks with feature changes.
2. Finance is not her strong suit. I still think she prices too low at first. But she argues that the long-term margin from these clients is above target, so I shouldn’t complain.
3. She is a bit light on strategic analysis; a little impulsive vs. studying something for too long.
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