**SMARTtools for Leaders™**

**Scorecard for the role:** VP of Sales

**Candidate:** Karen Tan  **Interviewer:** Jay Simms

**Date:** 8/1/2016 **Recommendation:** Proceed

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

**MISSION:** The mission for this role is to convert existing consulting clients into software customers, to achieve $100m in sales by 2020.

**OUTCOMES:**

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|  | **OUTCOMES** | **RATING and COMMENTS**  |
| 1 | SALES: Grow software sales from $12.5m in 2016 to $100m by 12/31/2020. | A. Karen started her career as a marketing manager and built a $50m software brand for Softcorp. Most recently Director of Sales at TLY Consulting Group, and grew their software division from $72m to $200m within 4 years. |
| 2 | CUSTOMER SATISFACTION: Achieve 90% customer satisfaction by selling appropriately-scoped software, and by providing excellent training and support. | A+. Won “Top Customer Ratings” by Gartner two years ago; cleared 90% customer satisfaction ratings in 2 of last 3 jobs. |
| 3 | MARGIN: Increase gross margin from software sales from 18% to 25% through pricing, by focusing on high-value clients, facing high-value problems, at high-value moments in time. | B+. Tends to “give away the store” to make first-time buyers happy, but increases price later. |
| 4 | HIRING: Build an inside sales team from 5 account managers with 60% A Players (3 As, 1 B, and 1 C) today, to 10 account managers with 90% A Players within 12 months. | A. Karen won the “Recruiting Maniac” award at her previous job, and has built three excellent teams. |
| 5 | STRATEGY: Contribute to the new 2017 strategic plan; create the sales part of the plan, which syncs with marketing and finance, by 12/31/2016. | B+. Karen describes herself as more of a “do-er” than a navel-gazer, but her instincts about strategy are excellent, focused, and pragmatic. She just doesn’t spend much time on data collection and analysis vs. using intuition and hard work to be successful. |

**COMPETENCIES:**

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| **PRIORITIES** | **WHO** | **RELATIONSHIPS** | **TECHNICAL** |
| Brainpower/learns quickly, B | Hires A players, A | Organization and planning, A- | Finance, B |
| Analysis skills, C+ | Develops people, A | Integrity/honesty, A+ | HR, A- |
| Strategic thinking/visioning, B+ | Removes underperformers, A | Calm under pressure, A- | Legal, B+ |
| Creative/innovative, B+ | Network of talented people, A | Aggressive, A | Information Technology, B+ |
| Sets high standards and goals, A |  | Moves fast, A | Other Role-Specific SkillsDirect sales, A+Digital marketing, BPR, B |
|  |  | Follows through on commitments, A- |  |
|  |  | Attention to detail, B |  |
|  |  | Enthusiasm/ability to motivate others, A |  |
|  |  | Persistent, A |  |
|  |  | Proactivity/takes initiative, A |  |
|  |  | Work ethic, A |  |
|  |  | Treats people with respect, A- |  |
|  |  | Flexible/adaptable, B+ |  |
|  |  | Listening skills, A- |  |
|  |  | Open to criticism and others’ ideas, A- |  |
|  |  | Written communications, B+ |  |
|  |  | Oral communication, A- |  |
|  |  | Teamwork, A- |  |
|  |  | Persuasion. A+ |  |
|  |  | Holds people accountable, A |  |

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