

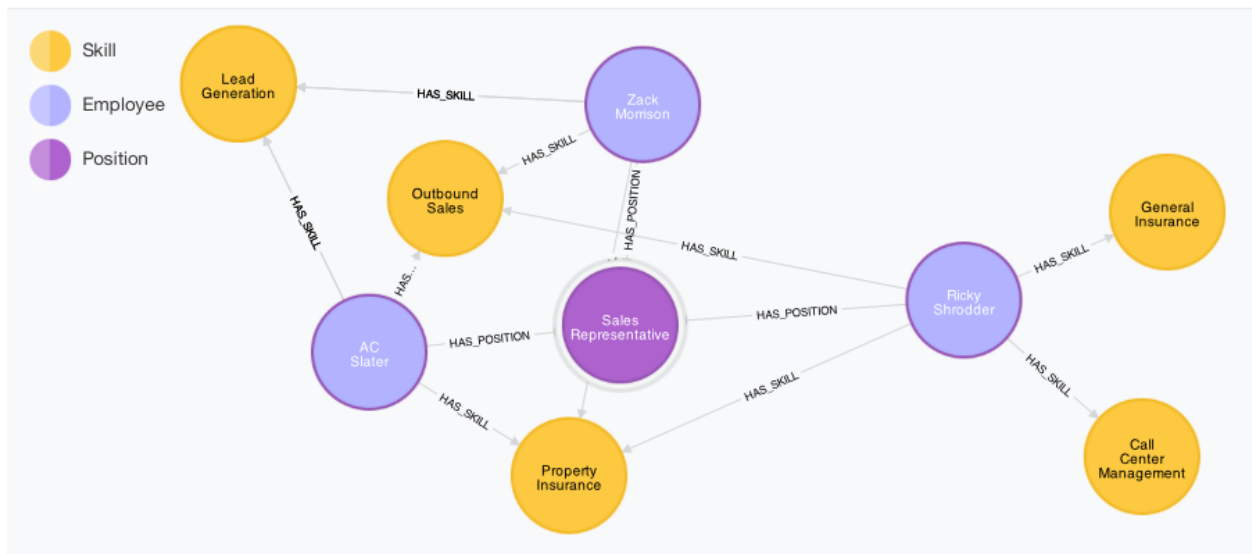
What Knowledge is Walking Out the Door?

Within your organization, r/ally quantifies the amount of organizational knowledge each employee has, allowing you to assess the impact of personnel changes to your institutional knowledge base.

Use Case

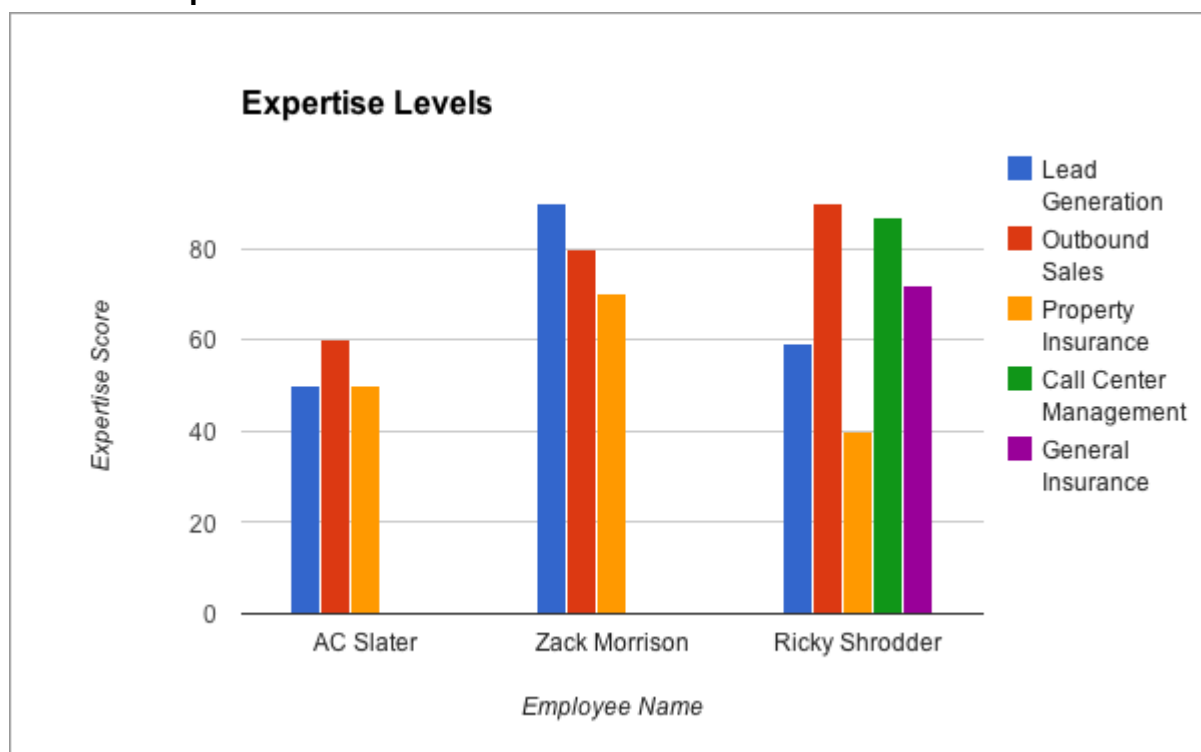
Olivia Lin, the CEO of Risk Insurance Corp must make some strategic decisions regarding an unsolicited offer of sale she received for the company. Part of the terms of the agreement would require her to reduce her salesforce as the acquirer will handle some sales. Olivia wants to assess the impact to her firm's institutional knowledge if she reduces her firm's sales force from 3 to 1 people.

Expertise Graph





Level of Expertise



Scenario Analysis

Given the relative expertise of Ms. Lin's existing sales representatives, which one of them should she retain post merger? This ultimately depends on the new post merger sales strategy. Will sales representatives be moved to a centralized call center or continue working out of branch offices?

Inbound Sales vs Outbound Sales

Zack vs. Ricky

Based on the expertise graph of sales representatives, it is clear that Zack thrives in an environment focused on Outbound Sales, while Ricky's strengths are in Call Center Management

	Lead Generation	Outbound Sales	Property Insurance	Call Center Management	General Insurance
AC Slater	50	60	50	n/a	n/a
Zack Morrison	90	80	70	n/a	n/a
Ricky Shrodder	59	90	40	87	72



Decision Paths:

If the post merger sales environment requires a person with strong Call Center Management knowledge/experience, Ricky Shrodder would be the sales representative most likely to be retained, possibly promoting him to a formal managerial position. Although the company will suffer the loss of lead generation and outbound sales skills, it will allow Ms. Lin to install one of her managers in a sales management position post merger, giving her better access to the direct goings on in the sales department.

Alternatively, if the sales environment stays as it is with sales representatives being more 'field' based, Zack's knowledge and skills are better suited to the situation as he is currently thriving in it. The company will lose someone with Call Center Management skills, but given that the company is not operating a call center in the future, losing those skills, by laying off Ricky, has less of an impact on sales than losing Zack.