



ALC

Analyst-Link Commentary tm

Examinee: - **WILLIAM SMITH**

Company: - ABC Corporation

Job Title: - Territory Manager

Date: - September 25, 2007

Sales Development Format

INSTRUCTIONS:

The information contained in this report is designed to assist in understanding and interpreting traits necessary for success in Sales. Read the header information atop each page. This section is designed for Management Review and interpretation and is designed to be used as part of the facilitation process. The development text section is designed to be shared with the examinee.

CONTENTS:

- ◆ Analyst-Link Commentary (*Job Suitability Ranking*)
- ◆ Behavioral Hierarchy
- ◆ Action Plan

CONFIDENTIAL

SAMPLE REPORT

ALC Sales Development Program

INSIGHTS WHEEL - WORK-STYLE GRAPH:

*The Success Insights Wheel Graph shows the natural and adapted work-style of the examinee. For more information or to better understand work-styles go to: www.analyst-link.net
Enter the following user name: understanding
Enter the following password in lower case type: workstyles*

BEHAVIORAL HIERARCHY:

Your key traits are shown on this page starting with the examinees greatest strengths and ending with traits that may require additional development.

- ◆ *Ratings of 9.0 to 10. Indicate High levels of competency*
- ◆ *Ratings of 7.0 to 8.5 are Above Average*
- ◆ *Ratings of 6.0 to 6.5 are Average*
- ◆ *Ratings of 5.5 to 5.75 are Marginal/Trainable*
- ◆ *Ratings of 5.0 to 5.5 are Marginal*
- ◆ *Ratings of 4.0 to 4.75 are considered to be Below Average*
- ◆ *Ratings of 3.0 to 3.75t are Poor*
- ◆ *Ratings of less than 3.0 are areas of concern.*

BENCHMARK:

Best results are obtained if a Benchmark is completed to accurately compare the examinee to the requirements of the job.

SUCCESS DISCOVERY PROCESS:

Please insist the examinee review this report and complete an action plan for improvement and fully complete the Success Discovery Process for Sales.

To assist in this effort -

Go to: www.analyst-link.net

Enter the following user name: success

Enter the following password in lower case type: guide

Select and Print out Guide (13)

Complete the worksheets and create an Action Plan.

ANALYST-LINK COMMENTARY

Overall Job Ranking as: **Territory Manager**

Performance Development Report

Examinee: **William Smith**

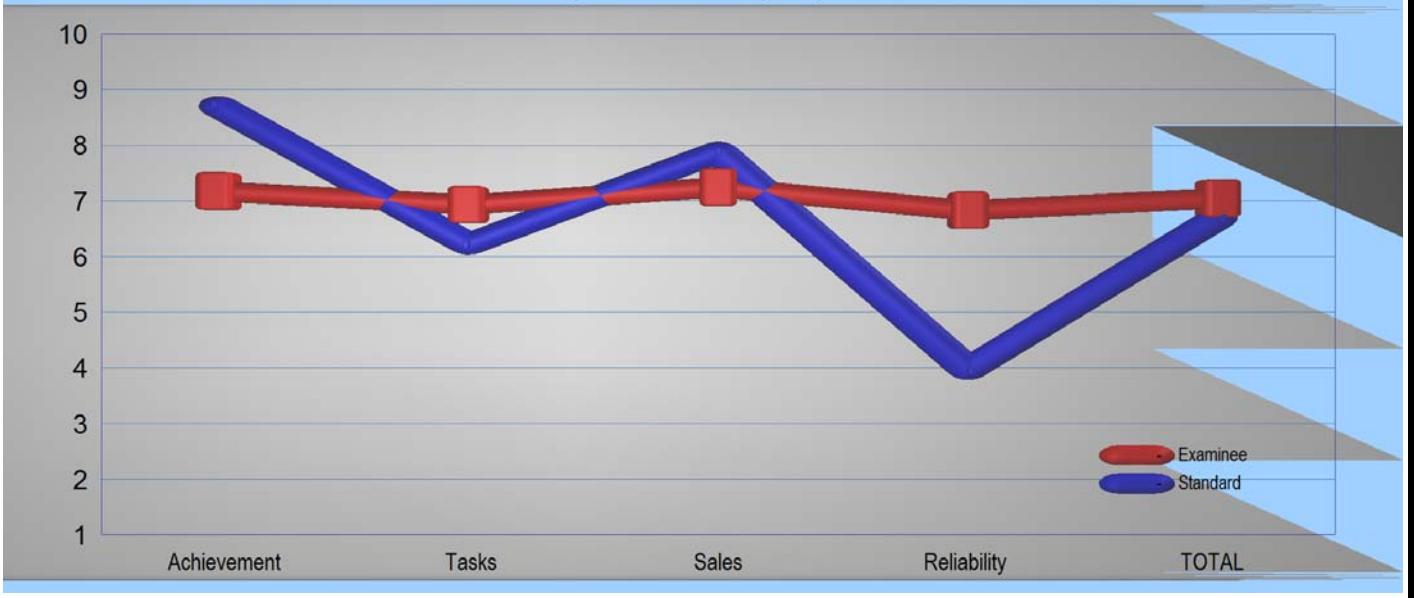
Overall Job Suitability: **65% Acceptable**

NOTE: Sales knowledge not a contributing part of this assessment. Administer the Sales Strategy Index.

Post-Hire Standard		Examinee/Comparison to Standard:		
Achievement Factors:	8.68	7.16	Above Average	-Lower
Task/Detail Factors:	6.22	6.93	Good	-Higher
Selling Factors:	7.86	7.24	Above Average	-Lower
Reliability Factors:	4.00	6.83	Good	-Higher
COMPENSATING FACTORS:	6.69	7.04	Above Average	-Higher

Years of Education: 14.49
 Number of Jobs in last 10 years: 3
 Number of years in the workplace: 10

Comparison: Examinee/Standard
 Examinee represented by square markers



WORK-STYLE ANALYSIS: Natural = **Persuading Promoter**

Adapted = **Promoting Persuader**

NOTES:

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Territory Development Sales

Analyst Comments & Custom Training Guide

William Smith

Overall Behavioral Inventory (Strength) : 70.74%

Job Title: Territory Manager

Achievement standard for this job: **High**

Natural Work - Style: **Persuading Promoter**

Adapted Work-Style: **Promoting Persuader**

Traits & Propensities	Standard	Examinee	TRAINING RECOMMENDATIONS
SELLING PROPENSITIES:			
Closing	5.50	7.05	
Handling Objections	9.25	7.17	- SUBSTANTIAL training required.
Empathy/Listening Skills	9.50	7.55	- Focused effort necessary.
Preparation/Thoroughness	6.75	7.17	
Presentations/Communication	9.17	7.46	- Focused effort necessary.
Prospecting/rejection	9.25	7.31	- Focused effort necessary.
Follow-up/Thoroughness	5.50	7.06	
Servicing after the sale	8.00	7.13	- Some training recommended.
Sales Propensity Averages->	7.86	7.24	- Overall training recommended.
ACHIEVEMENT PROPENSITIES:			
Challenge/Competitiveness	9.25	6.33	* PROFESSIONAL TRAINING REQUIRED.
Persuasiveness	9.21	7.31	- Focused effort necessary.
Results/Goal Orientation	8.00	7.67	- Minor review helpful.
Self Confidence	8.50	7.52	- Some training recommended.
Motivation/Self Directed	8.42	6.99	- Focused effort necessary.
Achievement Averages->	8.68	7.16	- Overall Strong Focus necessary.
TASK RELATED PROPENSITIES:			
Client Relations/Sociable	9.00	6.78	- SUBSTANTIAL training required.
Information/Fact Gathering	5.67	7.22	
Paper Work/Reports	4.00	6.78	
Task Propensity Averages->	6.22	6.93	- None
CONSISTENCY/RELIABILITY	4.00	6.83	

Interviewer
Comments:

Development Notes:

Existing Employee

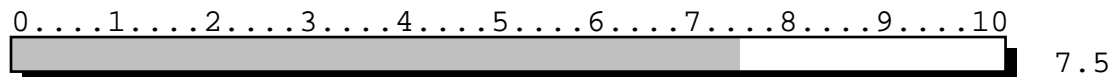
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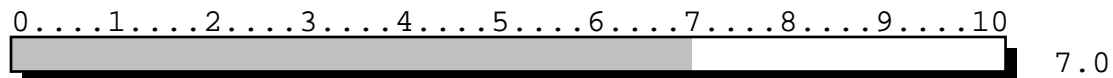
BEHAVIORAL HIERARCHY

The Behavioral Hierarchy graph will display a ranking of your natural behavioral style within a total of eight (8) areas commonly encountered in the workplace. It will help you understand in which of these areas you will naturally be most effective.

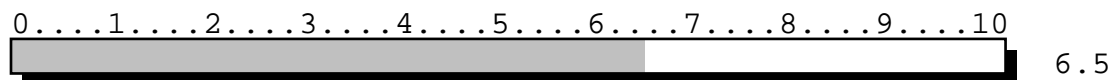
1. VERSATILITY



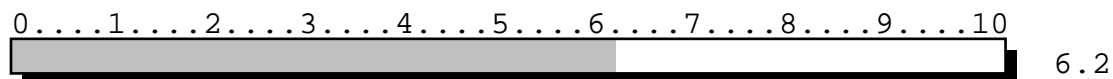
2. FREQUENT INTERACTION WITH OTHERS



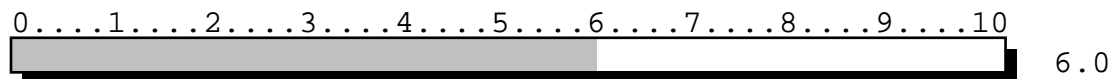
3. URGENCY



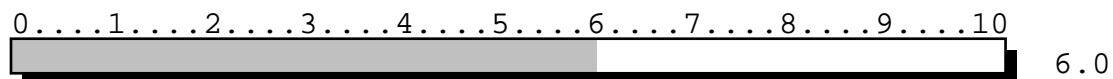
4. FREQUENT CHANGE



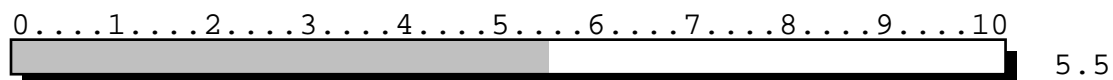
5. ANALYSIS OF DATA



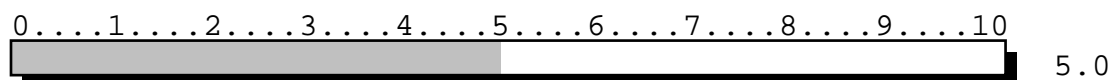
6. CUSTOMER ORIENTED



7. ORGANIZED WORKPLACE



8. COMPETITIVENESS



ALC Sales Action Plan Recommendations

NAME: _____

List three areas in which the examinee must focus effort. Select improvement items from the Development Guide , the text report, or the job description.

-
- **FIRST FOCUS AREA:** _____

Action Plan - Steps I will use to achieve improvement goals in this area:

Time frame to achieve this goal:

- **SECOND FOCUS AREA:** _____

Action Plan - Steps I will use to achieve improvement goals in this area:

Time frame to achieve this goal:

- **THIRD FOCUS AREA:** _____

Action Plan - Steps I will use to achieve improvement goals in this area:

Time frame to achieve this goal:

Date: / /

Action Plan Commitment Agreement by: _____ (Examinee)

Supported by: _____ (Manager/Facilitator)

ALC

Success Insights for Sales tm

Sales Employee Development Copy

Examinee: - **WILLIAM SMITH**
Company: - ABC Corporation
Job Title: - Territory Manager
Date: - September 25, 2007

INSTRUCTIONS:

The information contained in this report is designed to assist in understanding and interpreting traits necessary for success in Sales. Read the header information atop each page.

This report comments on multiple behavioral dimensions including:

- ◆ *Reaction to problems and challenges.*
- ◆ *Ability to persuade communicate and influence.*
- ◆ *Adaptability to the pace of the work environment.*
- ◆ *Action Plan*

SAMPLE REPORT

:

Understanding ALC Development Program for Sales

INFORMATION:

Behavioral research suggests that the most effective salespeople are those who understand themselves, both their strengths and weaknesses, so they can develop strategies to meet the demands of their environment.

A person's behavior is a necessary and integral part of who they are. In other words, much of our behavior comes from "nature" (inherent) and much comes from "nurture" (our upbringing). It is the universal language of "how we act," or our observable human behavior.

SUCCESS DISCOVERY PROCESS:

After reviewing this report it is important that you read and fully complete the Success Discovery Process for Sales. Understanding how to apply the information contained herein to your sales effort is a vital step to effect performance improvement..

To assist in this effort -

Go to: www.analyst-link.net

Enter the following user name: success

Enter the following password in lower case type: guide

Select and Print out Guide (13)

Complete the worksheets and create an Action Plan.

LINKED PERFORMANCE CATALYSTS

VALUE TO THE ORGANIZATION

IDEAL (*Work*) ENVIRONMENT

For a person to achieve their optimum value to the organization their ideal work environment needs must be fulfilled. The more closely the organization can provide the "Ideal work environment" the more "Value to the organization" attributes will be realized. The following two pages are closely linked. Please read them carefully.



VALUE TO THE ORGANIZATION

This section of the report identifies the specific talents and behavior William brings to the job. By looking at these statements, one can identify his role in the organization. The organization can then develop a system to capitalize on his particular value and make him an integral part of the team.

- Accomplishes goals through people.
- Negotiates conflicts.
- Verbalizes his feelings.
- Few dull moments.
- Good mixer.
- Team player.
- Optimistic and enthusiastic.
- Deadline conscious.
- Sense of urgency.



IDEAL ENVIRONMENT

This section identifies the ideal work environment based on William's basic style. People with limited flexibility will find themselves uncomfortable working in any job not described in this section. People with flexibility use intelligence to modify their behavior and can be comfortable in many environments. Use this section to identify specific duties and responsibilities that William enjoys and also those that create frustration.

- Democratic supervisor with whom he can associate.
- Freedom from long, detailed reports.
- New products and new ideas to sell.
- Freedom of movement.
- Assignments with a high degree of people contacts.
- Works for a manager who makes quick decisions.
- Support team with sense of urgency.



INTRODUCTION

Behavioral research suggests that the most effective people are those who understand themselves, both their strengths and weaknesses, so they can develop strategies to meet the demands of their environment.

A person's behavior is a necessary and integral part of who they are. In other words, much of our behavior comes from "nature" (inherent), and much comes from "nurture" (our upbringing). It is the universal language of "how we act," or our observable human behavior.

In this report we are measuring four dimensions of normal behavior. They are:

- how you respond to problems and challenges.
- how you influence others to your point of view.
- how you respond to the pace of the environment.
- how you respond to rules and procedures set by others.

This report analyzes behavioral style; that is, a person's manner of doing things. Is the report 100% true? Yes, no and maybe. We are only measuring behavior. We only report statements from areas of behavior in which tendencies are shown. To improve accuracy, feel free to make notes or edit the report regarding any statement from the report that may or may not apply, but only after checking with friends or colleagues to see if they agree.

*"All people exhibit all four behavioral factors in varying degrees of intensity."
—W.M. Marston*



SALES CHARACTERISTICS

Based on William's responses, the report has selected general statements to provide a broad understanding of his sales style. This section highlights how he deals with preparation, presentation, handling objections, closing, and servicing. The statements identify the natural sales style he brings to the job. Eliminate or modify any statement that is not true based on sales training or experience.

William has considerable flexibility. You can expect him to use this flexibility to create excitement in any area he lands. He is highly excited about what influences him. He displays this emotion when attempting to influence people to his way of thinking. He feels comfortable in a sales environment with a large product line. The variety, challenge, and opportunity of a large product mix motivate him. He strains at the leash of informality and often struggles with others who do not have the same sense of urgency which drives him. William prefers having many activities at any given time. He feels that little or nothing can be accomplished without the pressure of involvement. He becomes so busy he may forget to follow up on potential buyers in a timely fashion. Being impulsive, he seeks change for change's sake. He often struggles with those who do not share this same desire.

William uses considerable body language with his presentation. In fact, he may use so much that it serves as a barrier when selling to the conservative buyer. He usually welcomes objections. They provide him with the opportunity to meet a challenge and share his knowledge. He may want to win on every objection, sometimes even to the extent that he loses the sale. He is good at selling both tangible and intangible products. He can paint word pictures using both words and body language. William may be intense. Sometimes he may not fit the intensity to the sales situation. He has difficulty sitting



SALES CHARACTERISTICS

patiently and listening to the potential buyer talk. He wants to be involved in the conversation and may interrupt the buyer just to get his point across.

William would rather sell a new account than service an old account. New accounts present a challenge, while service can be seen as dull and boring. He can encounter difficulty closing the buyer who wants to consider his decision before buying. He makes quick purchase decisions himself and has little empathy for buyers who can't make decisions quickly. He has a few favorite closes, and may overuse his favorite. He needs to concentrate on selecting the appropriate close to fit the situation. He will be direct and positive with his closes, and be friendly as well as persistent. William can be very good or very bad at servicing the customer. Servicing usually depends on his activity level or the customer potential. He is prone to close soon and often. He likes to close and the sooner the better.



PERCEPTIONS

A person's behavior and feelings may be quickly telegraphed to others. This section provides additional information on William's self-perception and how, under certain conditions, others may perceive his behavior. Understanding this section will empower William to project the image that will allow him to control the situation.

"See Yourself As Others See You"

SELF-PERCEPTION

William usually sees himself as being:

Flexible
Energetic
Alert

Active
Pressure-Oriented
Impatient

OTHERS' PERCEPTION

Under moderate pressure, tension, stress or fatigue, others may see him as being:

Intense
Disinterested

Restless
Hasty

And, under extreme pressure, stress or fatigue, others may see him as being:

Hyperactive
Poor Listener

Pushy
Impulsive



NATURAL AND ADAPTED SELLING STYLE

William's natural selling style of dealing with problems, people, pace and procedures may not always fit the sales environment. This section is extremely important as it will identify if a salesperson's natural style or adapted style is correct for the current sales environment.

Natural	PROBLEMS - CHALLENGES	Adapted
William is quite inquisitive and wants to be seen as an outwardly competitive person. He is results-oriented and likes to be innovative in his sales approach. He is not necessarily confrontational by nature, but will not turn down the opportunity for confrontation if the opportunity exists.		William's response to the sales environment is to be strong-willed and ambitious. He seeks to win against all obstacles.

Natural	PEOPLE - CONTACTS	Adapted
William is sociable and optimistic. He is able to use an emotional appeal to convince others of a certain direction. He will trust others and likes a positive environment in which to sell.		William projects a positive and enthusiastic attitude toward influencing others. He sees the need to be trusting and wants to be trusted.



NATURAL AND ADAPTED SELLING STYLE

Natural	PACE - CONSISTENCY	Adapted
William wants a sales environment that is intense and demanding. He feels a great sense of urgency to close his prospects quickly. He feels comfortable selling new products that meet his prospect's needs.		William feels that the sales environment doesn't require him to alter the way he deals with activity level and consistency.

Natural	PROCEDURES - CONSTRAINTS	Adapted
William sees the need to be flexible about rules; however, he is also aware and sensitive to the consequence of not following those rules.		William sees the environment as requiring him to project an independent approach to the sales process. He will test new ideas to achieve sales results. He uses adaptability and flexibility in his attempt to satisfy customer needs.



KEYS TO MOTIVATING

This section of the report was produced by analyzing William's wants. People are motivated by the things they want; thus, wants that are satisfied no longer motivate. Review each statement produced in this section with William and highlight those that are present "wants."

William wants:

- Power and authority to take the risks to achieve sales results.
- Control of his own destiny.
- Freedom to talk and participate in sales meetings.
- Prestige, position and titles so he can control the destiny of others.
- Freedom from control and detail.
- A friendly work environment.
- Group activities outside the job.
- Public recognition of his ideas and sales results.
- New challenges and problems to solve.
- To be seen as a leader.
- Flattery, praise, popularity and strokes.
- Rewards to support his dreams.
- Participation in meetings on future planning.



KEYS TO MANAGING

In this section are some needs which must be met in order for William to perform at an optimum level. Some needs can be met by himself, while management must provide for others. It is difficult for a person to enter a motivational environment when that person's basic management needs have not been fulfilled. Review the list with William and identify 3 or 4 statements that are most important to him. This allows William to participate in forming his own personal management plan.

William needs:

- Objectivity in managing a sales territory.
- To maintain focus on results and not sacrifice productivity just to make everyone happy.
- Objectivity when dealing with customers because of his high trust level.
- To focus conversations on work activities--less socializing.
- More logical presentations--less emotional.
- Better organization of record keeping.
- Vacations or periods of reduced activity level.
- Participatory management.
- To mask emotions when appropriate.
- Annual physicals because of his activity level and work intensity.
- To be informed of things which affect him.
- Deadlines for completion of work.
- People to work and associate with.



CHECKLIST FOR COMMUNICATING

Most people are aware of and sensitive to the ways with which they prefer to be communicated. Many people find this section to be extremely accurate and important for enhanced interpersonal communication. This page provides other people with a list of things to DO when communicating with William. Read each statement and identify the 3 or 4 statements which are most important to him. We recommend highlighting the most important "DO's" and provide a listing to those who communicate with William most frequently.

Do:

- Use his jargon.
- Give strokes for his involvement.
- Provide testimonials from people he sees as important.
- Provide a warm and friendly environment.
- Read the body language for approval or disapproval.
- Ask for his opinions/ideas regarding people.
- Be specific and leave nothing to chance.
- Be open, honest and informal.
- Provide ideas for implementing action.
- Put projects in writing with deadlines.
- Provide systems to follow.
- Talk about him, his goals and opinions he finds stimulating.



DON'TS ON COMMUNICATING

This section of the report is a list of things NOT to do while communicating with William. Review each statement with William and identify those methods of communication that result in frustration or reduced performance. By sharing this information, both parties can negotiate a communication system that is mutually agreeable.

Don't:

- Forget to follow-up.
- Drive on to facts, figures, alternatives or abstractions.
- Talk down to him.
- Legislate or muffle--don't overcontrol the conversation.
- Take credit for his ideas.
- Talk too slow or dwell on details to excess.
- Use paternalistic approach.
- Be curt, cold or tight-lipped.
- Let him change the topic until you are finished.
- Waste time trying to be impersonal, judgmental, or too task-oriented.
- Be dogmatic.



SELLING TIPS

This section provides suggestions on methods which will improve William's communications when selling to different styles. The tips include a brief description of typical people in which he may interact. By adapting to the communication style desired by other people, William will become more effective in his communications with them. He may have to practice some flexibility in varying his communication style with others who may be different from himself. This flexibility and the ability to interpret the needs of others is the mark of a superior salesperson.

<p>When selling to a person who is dependent, neat, conservative, perfectionist, careful and compliant:</p> <ul style="list-style-type: none">■ Prepare your "presentation" in advance.■ Stick to business--provide fact to support your presentation.■ Be accurate and realistic--don't exaggerate. <p>Factors that will create tension:</p> <ul style="list-style-type: none">■ Being giddy, casual, informal, loud.■ Wasting time with small talk.■ Being disorganized or messy.	<p>When selling to a person who is ambitious, forceful, decisive, strong-willed, independent and goal-oriented:</p> <ul style="list-style-type: none">■ Be clear, specific, brief and to the point.■ Stick to business. Give an effective presentation.■ Come prepared with support material in a well-organized "package." <p>Factors that will create tension:</p> <ul style="list-style-type: none">■ Talking about things that are not relevant to the issue.■ Leaving loopholes or cloudy issues.■ Appearing disorganized.
<p>When selling to a person who is patient, predictable, reliable, steady, relaxed and modest:</p> <ul style="list-style-type: none">■ Begin with a personal comment--break the ice.■ Present yourself softly, nonthreateningly and logically.■ Earn their trust--provide proven products. <p>Factors that will create tension:</p> <ul style="list-style-type: none">■ Rushing headlong into the interview.■ Being domineering or demanding.■ Forcing them to respond quickly to your questions.	<p>When selling to a person who is magnetic, enthusiastic, friendly, demonstrative and political:</p> <ul style="list-style-type: none">■ Provide a warm and friendly environment.■ Don't deal with a lot of details, unless they want them.■ Provide testimonials from people they see as important. <p>Factors that will create tension:</p> <ul style="list-style-type: none">■ Being curt, cold or tight-lipped.■ Controlling the conversation.■ Driving on facts and figures, alternatives, abstractions.



ADAPTED STYLE

William sees his present work environment requiring him to exhibit the behavior listed on this page. If the following statements DO NOT sound job related, explore the reasons why he is adapting this behavior.

- Adaptable in meeting the needs of clients or customers.
- Anticipating and using creative ways to assist clients in problem solving.
- Verbally stressing the benefits of his product or service.
- Telling clients or customers about the "big picture."
- Speaking smoothly and emotionally with his customers or clients.
- Using great social strengths in approaching new prospects.
- Generating enthusiasm in others.
- Excited about available new products or services.
- Exhibiting excitement about his service or product.
- Using persuasive skills.
- Dealing with customers and clients efficiently.
- Using authority and responsibility for completing the sale.



AREAS FOR IMPROVEMENT

In this area is a listing of possible limitations without regard to a specific job. Review with William and cross out those limitations that do not apply. Highlight 1 to 3 limitations that are hindering his performance and develop an action plan to eliminate or reduce this hindrance.

William has a tendency to:

- Change priorities daily without looking at the overall program.
- Not live up to what he promises because of the overabundance of activities.
- Have difficulty finding a balance between personal life and work.
- Be disruptive in sales meetings because of his innate restlessness and disdain for sameness.
- Fail to complete sales orders because of adding more and more projects and activities into his life.
- Overextend and spread himself too thin, both on and off the job.
- Be explosive by nature and lack the patience to negotiate with the slower-moving buyers.
- Have difficulty hearing what the buyer truly wants.
- Promise more service than he can deliver.

ALC Self-Help Action Plan for Sales

NAME: _____

List three areas in which you see the need to focus effort along with your plan of action to achieve the desired goal. Select improvement items from the Development Guide, the text report, or suggestions from your manager or facilitator.

- **FIRST FOCUS AREA:** _____

Action Plan - Steps I will use to achieve improvement goals in this area:

Time frame to achieve this goal:

- **SECOND FOCUS AREA:** _____

Action Plan - Steps I will use to achieve improvement goals in this area:

Time frame to achieve this goal:

- **THIRD FOCUS AREA:** _____

Action Plan - Steps I will use to achieve improvement goals in this area:

Time frame to achieve this goal:

Date: / /

Action Plan Commitment Agreement by: _____ (Examinee)

Supported by: _____ (Manager/Facilitator)