



Examinee : - **ANDREW MARTINEZ**

Company: - ABC Industries

Job Title: - Territory Development Sales

Date: - July 26, 2010

SALES MANAGEMENT SUMMARY -
 FasTrack Performance Development Review and Appraisal

INTRODUCTION:

Behavioral research suggests that the most effective sales managers are those who understand the strengths and weaknesses of their team. A salesperson's behavior is a necessary and integral part of who they are and is the foundation of what they are able to accomplish. This assessment report considers education, work history, behavioral propensities, and is custom configured to the job as it exists in your organization.

Contents:

- **Analyst-Link Recap** - (Job Suitability Graph)
- **Sales Manager's Report** & Analyst Comments

CONFIDENTIAL

This portion of the report is for Management use and is not to be distributed to the examinee.

SAMPLE REPORT

SALES MANAGER'S INSTRUCTIONS

THIS SALES Performance REVIEW REPORT IS PRINTED IN THREE PARTS:

1. SALES MANAGER'S (Confidential) SUMMARY:

This summary is designed to show the behavioral match of the examinee as compared to successful people in the same type of job. This portion of the "FasTrack" report is not to be disseminated to the examinee as it contains a job suitability ranking based on your determination of the behavioral requirements of the job (as submitted to us on the Analyst-Link "Activator" form).

2. SALES TRAINING & DEVELOPMENT INSIGHTS - PART I

This is the "Training" section of the "Analyst-Link" commentary. It is designed to assist the employee in understanding the behavioral and motivational requirements of the job and to help them understand areas where training effort should be focused.

3. SALES TRAINING & DEVELOPMENT INSIGHTS - PART II

This section consists of the (R) Managing for Success Report. It contains valuable insight into the "work-style" of the examinee to help them understand their response to the work environment. The header atop each page contains information for use. Refer to the Success Discovery Process addendum to maximize the effectiveness of this report.

NOTE:

Pay close attention to the "Value to the Organization" and the "Ideal Environment" pages as they are symbiotically linked.

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. Understanding the link between these two pages is critical to developing the examinee.

SKILL TRAINING:

We recommend the administration of the Sales Strategy Index (SSI) assessment to evaluate this persons ability to sell in a competitive environment and judge their ability to strategize for sales success.

FACILITATION:

For best results refer to our facilitation guidelines and encourage the employee to read their review instructions and complete the Success Discovery Process.

Success Discovery Process - Go to: www.analyst-link.net

*Click on the Navigation Link Labeled - **SDP workbook**
Select and Print out Guide (9)*

Complete the worksheets and create an Action Plan.

Manager: For more information: - Go to: <http://www.analyst-link.net>

Performance Development Revue Format: SALES Version - SAMPLE REPORT

SUCCESS FACTOR ANALYSIS

RANK as *Sales Representative*

Examinee: **Andrew Martinez**

***Trainable**

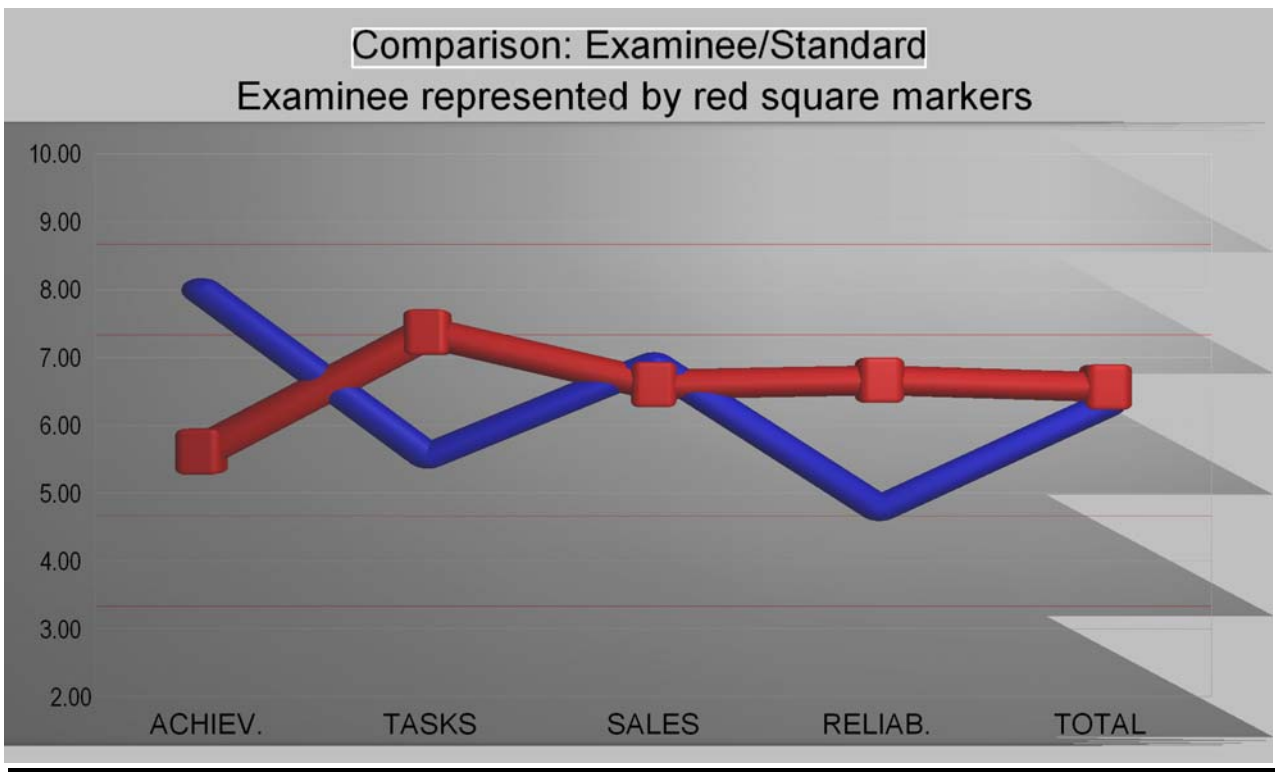
Overall Job Suitability: 43% Below Average

Post-Hire Standard

Examinee/Comparison to Standard:

Achievement Factors:	7.98	5.63 Marginal	-Lower
Task/Detail Factors:	5.56	7.36 Above Average	-Higher
Selling Factors:	6.90	6.60 Good	-Lower
Reliability Factors:	4.79	6.67 Good	-Higher
COMPENSATING FACTORS:	6.31	6.57 Good	-Higher

Ability to work on commission: 6.20 Acceptable



NOTES:

Company:

ABC Industries

Sales Manager's Report

ABC Industries

Andrew Martinez
43% Below Average
 Sales Representative

STATUS: L/T Employee

- Employed 1 year or more.

BEHAVIORAL RANKINGS		Match to "Standard"	
Sales Factors:	6.60 Good	-----	Lower
Achievement Factors:	5.63 Marginal	-----	Lower
Task/Detail Factors:	7.36 Above Average	-----	Higher
Reliability Factors:	6.67 Good	-----	Higher
Compensating Factors:	6.57 Good		
Behavioral Inventory:	6.44		
Advancement Potential: -			
Ability work on Commission: Acceptable			
Selling Skill Rating:			

CURRENT FOCUS
Standard Examinee

BEHAVIORAL TRAITS	Standard	Examinee	TRAINING REQUIREMENTS
>> Sales Traits-	6.90	6.60	- Overall review helpful.
Achievement Traits-	7.98	5.63	- Substantial training a must!
Task Propensities-	5.56	7.36	- None
> Consistency/Reliability-	4.79	6.67	- None

- NOTE: A grade equal to the standard is recommended for "Key" items marked > or >>.

ANALYST COMMENTS:

- Andrew exhibits a sales support behavioral profile.
- His natural and adapted work-style is "Promoting Relater."
- Current sales orientation matches patterns of those who are focusing on territory development.
- Achievement traits are ascending. This is a positive focus that should be encouraged and facilitated.
- Current focus is positive and sales oriented however Andrew requires additional sales training and guidance to sustain his positive focus.
- Provide training as recommended on the detailed development guide.
- * NOTE: To be productive the examinee may require additional development & supervision.
- All ratings based on a scale of 1 to 10. 5.00 is a passing albeit marginal grade.

- Selling skill undetermined. Administer the Sales Strategy Index. Education years: 12

Rank: 3=Poor, 4=Below Average, 5=Marginal, 6=Acceptable, 6.50=Good 7=Above Average, 8=Excellent, 9=Superior
 > = Key job parameter traits. >> = Most important job trait as selected by the test administrator.

Number of jobs in 10 years: 3 Work Years: 10 Supervision: Minimum 07/26

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NOTES:

ACTION PLAN - Manager's Recommendations

NAME: _____

List three areas in which you see the need to recommend focus effort along with your plan of action to achieve the desired goal. Select improvement items from the Development Guide , the text report, past work history (experiences), or job description.

- **FIRST FOCUS AREA:** _____

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

Time frame to achieve this goal:

- **SECOND FOCUS AREA:** _____

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

Time frame to achieve this goal:

- **THIRD FOCUS AREA:** _____

Action Plan - Steps to 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)

FACILITATION GUIDELINES

Being an effective coach is the primary duty of any Manager or Supervisor. The coaching process is all about building a "Communications Link" between management and employee.

Instructions:

1. Provide a copy of the Employee portion of this report to the employee. The Coach copy includes a job suitability rating and coaching tips. This portion of the report is Confidential and should not be shared with the employee.
2. Provide the appropriate Success Discovery Process (SDP) workbook
3. Ask the employee underline or highlight any statement in their copy of the report they strongly disagree with. Ask they fill out the "Success Discovery Process" Workbook and complete an Action Plan for improvement" focusing on the three most important areas to be improved. These items must be completed before the facilitation discussion.
4. Create a discussion agenda by underlining any statement on the review that, in your opinion is true, but impacts negatively on the employees' performance. Use this information along with notes from the employees' personnel file and job description to fill out your version of the "Action Plan" to be used as your discussion agenda. Also highlight positive statements that are true, use these to deliver praise to the employee. Balance development comments with praise commentary.
5. Create an unhurried setting, allow at least one hour for the facilitation process; serve a beverage, keep it casual. Remember your goal is to establish a dialog and assist the employee in creating their own development program. Allow the employee to do more than half of the talking. Ask their opinion of the Review; ask them to discuss any statement in the report with which they strongly disagree. Ask open ended questions. Ask for suggestions. Listen! Ask if you can take notes.
6. Your goal is to obtain improved performance through interactive dialog. It cannot be achieved if the employee has set up defensive barriers. Use positive comments to maintain interest. As they discuss statements from the report in dispute, it is acceptable to add your comments. Remember to agree or disagree with the REPORT not the employee. Do not be general, give specific examples. Stick to facts.
If the employee disagrees with a statement in the report and you concur say "In this instance I disagree with the report." If the employee disagrees with a statement in the report and it is true, say "In this instance I agree with the report and let me give you an example."
7. Don't allow complaints about the company, other employees, or other departments to mask the real purpose of this discussion; which is, to improve the performance of the employee being reviewed. Salary, benefits, and money issues are not and should never be part of the performance review and facilitation process. Compensation levels should increase only when the employee increases their value to the organization.
8. Combine your "Action Plan for Improvement" with theirs. Decide on mutually agreed improvement goals and write up a new "Action Plan" focusing on no more than 3 areas for improvement. Get input from the employee as to the best way to accomplish goals, and the time-frames involved.
9. Continue the momentum. Review the performance goals, weekly if necessary, to make certain focus is being maintained. When the first three areas for improvement are corrected; create a new action plan to address other issues. Focus and follow-up!

SFA

Examinee : - **ANDREW MARTINEZ**
Company: - ABC Industries
Job Title: - Territory Development Sales
Date: - July 26, 2010

SALES TRAINING & DEVELOPMENT INSIGHTS - Part I

Contents:

■ DETAILED DEVELOPMENT GUIDE

This page compares your work-style to top performers in the same type of job using one of our job specific databases combined with input from the MFS report by TTI Performance Systems Ltd. We interpret your natural and adapted ratings to custom define your training needs.

■ NATURAL/ADAPTED BEHAVIORAL SALES FOCUS

This page is both a verbal and visual representation your current focus. Review each item carefully especially those selected by the test administrator as being vital for success on the job (items marked >). Discuss any focus that is contrary to the needs of the job as it exists in your organization.

SAMPLE REPORT

DETAILED DEVELOPMENT GUIDE

Prepared for: **Andrew Martinez**

As: **Sales Representative**

-INSTRUCTIONS:

Carefully review the training and development recommendations listed on this page. Discuss them with your Sales Manager or Facilitator. Keep in mind they refer to "Behavioral and Motivational" traits, not skills. Items marked with > are considered to be important to the job. Item marked >> is of key importance.

Traits & Propensities	CURRENT FOCUS		TRAINING RECOMMENDATIONS	Stress Levels
ABC Industries	Standard	Examined		
SELLING PROPENSITIES:				
Closing	9.30	6.42	* PROFESSIONAL TRAINING REQUIRED.	-
> Handling Objections	8.71	6.42	- SUBSTANTIAL training required.	-
Empathy/Listening Skills	5.00	6.92		-
Preparation/Thoroughness	5.00	7.08		-
Presentations/Communication	8.71	6.33	- SUBSTANTIAL training required.	Low
Prospecting/rejection	8.38	5.58	* PROFESSIONAL TRAINING REQUIRED.	-
> Follow-up/Thoroughness	5.17	6.92		-
Servicing after the sale	4.92	7.17		-
>> Sales Propensity Averages->	6.90	6.60		
ACHIEVEMENT PROPENSITIES:				
Challenge/Competitiveness	7.79	5.67	- SUBSTANTIAL training required.	-
> Persuasiveness	8.75	6.08	* PROFESSIONAL TRAINING REQUIRED.	Low
> Results/Goal Orientation	7.25	5.08	- SUBSTANTIAL training required.	-
Self Confidence	7.63	5.50	- SUBSTANTIAL training required.	-
Motivation/Self Directed	8.46	5.83	* PROFESSIONAL TRAINING REQUIRED.	Low
Achievement Averages->	7.98	5.63		
TASK PROPENSITIES:				
Client Relations/Sociable	6.46	8.08		-
Information/Fact Gathering	5.83	7.08		-
Paper Work/Reports	4.38	6.92		-
Task Propensity Average	5.56	7.36		
> CONSISTENCY/RELIABILITY	4.79	6.67		-

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NOTES: _____

Natural/Adapted Behavioral Focus - Sales

Understanding Change:

The ratings listed here compare the "Natural" or "Basic" traits you bring to the job against the "Adapted" or "Response" traits upon which you are focusing in response to the perceived requirements of the job. These are considered to be "Raw" or transitional scores that are uninterpreted to your current focus. The interpreted scores may be found within the "Development Guide." They are adjusted to allow for your current phase which is weighted toward Pre-hire, Current Job Suitability, and/or Job development.

If the difference between Natural and Adapted behavior is greater than 1.50, it indicates a change in focus that is somewhat outside your normal range and may, even if the focus is positive, cause stress. The greater the difference the more intense the stress may become. Minor differences (1.00 or less) are often normal adaptation to your concept of the needs of the job. Major differences, (More than 2.00) indicate behavioral masking and are the primary cause of stress which in turn causes fragmented performance and job dissatisfaction. Intelligent people constantly adapt to their work environment (Transitional phasing) where even stress can be a positive force. Stress will dissipate when your current phase transition is complete.

Review this page with your manager or facilitator to determine if your current focus should be redirected.

	Natural or "Basic"	Adapted or "Response" [Trait intensity]	Stress
	Closing	5.75 6.75 -----> Increased Focus	-
>	Handling Objections	5.75 6.75 -----> Increased Focus	-
	Empathy/Listening Skills	7.25 6.75 <----- Declining	-
	Preparation/Thoroughness	7.25 7.00 <----- Declining	-
	Presentations/Communication	5.50 6.75 -----> Increased Focus	Low
	Prospecting/rejection	5.25 5.75 -----> Increased Focus	-
>	Follow-up/Thoroughness	7.25 6.75 <----- Declining	-
	Servicing after the sale	7.50 7.00 <----- Declining	-
>>	Sales Averages->	6.44 6.69 -----> Increased Overall Sales Focus	
	Challenge/Competitiveness	5.50 5.75 -----> Increased Focus	-
>	Persuasiveness	5.25 6.50 -----> Increased Focus	Low
>	Results/Goal Orientation	4.75 5.25 -----> Increased Focus	-
	Self Confidence	5.00 5.75 -----> Increased Focus	-
	Motivation/Self Directed	5.00 6.25 -----> Increased Focus	Low
	Achievement Averages->	5.10 5.90 -----> Increased Achievement Focus	
	Client Relations/Sociable	8.25 8.00 <----- Declining	-
	Information/Fact Gathering	7.25 7.00 <----- Declining	-
	Paper Work/Reports	7.25 6.75 <----- Declining	-
	Task Averages->	7.58 7.25 <----- Declining Overall Task Focus	
>	CONSISTENCY/RELIABILITY	7.00 6.50 <----- Declining Reliability/Diligence	-

NOTES: _____



SFA

Managing For Success *tm*

Examinee : - **ANDREW MARTINEZ**

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SALES TRAINING & DEVELOPMENT INSIGHTS - Part II Workbook Section of the A-L Performance Development Review

"FasTrack" *tm* Program Contents:

- Value to the Organization (*potential*)
 - Ideal (*work*) Environment
(Value to the Organization becomes reality only when Ideal Work-Environment needs are met).
 - Sales (*work-style*) Characteristics
 - Checklist for Communicating with you
 - Don'ts on Communicating with you
 - Perceptions (*stress signals*)
 - Keys to Managing
 - Keys to Motivating
 - Natural versus Adapted Selling style
 - Adapted (sales) Style (*Current focus and approach to the job*)
 - Areas for Improvement
 - Selling & Communication Tips (*Guidelines to effectively persuade others*)
 - Action Plan
-
- **Success Discovery Process** - Go to: www.analyst-link.net
Enter the following user name: **success**
Enter the following password: **guide** (lower case type) **Select Guide (4)**

Read the development paragraph at the top of each of the following pages to understand the dynamics of your Work-Style.

VALUE TO THE ORGANIZATION

This section of the report identifies the specific talents and behavior Andrew 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.

- Turns confrontation into positives.
- Positive sense of humor.
- Team player.
- Builds confidence in others.
- Motivates others towards goals.
- Adaptable.
- Creative problem-solving.
- People-oriented.

IDEAL ENVIRONMENT

This section identifies the ideal work environment based on Andrew'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 Andrew enjoys and also those that create frustration.

- Democratic supervisor with whom he can associate.
- Practical approach to selling his products or services.
- Old sales territory as compared with new sales territory.
- Assignments with a high degree of people contacts.
- Sales territory for which standards and goals are established.
- Work place where people seldom get mad.
- Assignments that can be completed one at a time.

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 Andrew'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.

Andrew can sell both tangible and intangible products successfully. His ability to paint word pictures can be a distinct advantage when he is called upon to explain an intangible. Inclined to talk smoothly, readily and at length, he loves the opportunity to verbalize. Sales presents an opportunity for him to use this great attribute. He is optimistic about his great ability to influence people to buy his products or services. Socially and verbally aggressive, he loves to meet strangers and begin conversations. This is a great attribute when new territory is opened, or new accounts are dictated by business conditions. Andrew becomes highly excited about selling something that he really likes. He maintains a high trust level; that is, he trusts that people will make good on their promises. He becomes highly excited about what influences him. He usually displays this emotion when he is attempting to influence people.

Andrew may promise how his product will solve the prospect's problems. Sometimes he becomes overly optimistic about the actual results his products will deliver. He doesn't necessarily do this intentionally, but reflects his optimistic view of the product. He experiences difficulty in telling a prospect that he doesn't have the answer to the prospect's objections. His natural sales style attempts to answer the objections even if he lacks the proper data to do so. He would rather take the risk than admit failure. He should learn to follow all objections with a question. This will allow him time to prepare his answer and

SALES CHARACTERISTICS

help clarify the prospect's actual objection. He frequently uses emotion and active body language in his sales presentation. With some buyers this could be detrimental because they may see him as being superficial. Andrew depends on his prospects to trust his judgment in recommending his products or services. Not all prospects are as trusting and some will want facts and data to support his judgment. He succeeds in projecting self-confidence in his sales presentations. This self-confidence evolves from his belief in himself and his products or services. This may cause him to become frustrated if a prospect attacks either him or his product.

Andrew's listening skills may cause him to miss some closing opportunities. He may be thinking about what he is going to say next and miss the buying signal. Sometimes he tries too hard to accommodate the buyer with service. He will resent his effort if the account doesn't live up to its potential. He may promise more than he can deliver to close a sale. He does intend to deliver what he says, but he has difficulty finding the time to provide what he promises. His optimism makes him believe he can deliver. If given the choice, he would prefer to sell a new account instead of servicing an old account. This is especially true if the old account has little potential or requires sufficient facts and data to support their purchase decisions. Andrew can be seen as a good closer. However, he may postpone the close until giving the complete sales pitch. Observers have actually seen him sell the product and then buy it back. He should guard against excessive talking and close at the appropriate time. He probably has several favorite closes. He needs to

SALES CHARACTERISTICS

evaluate the way he is using them and if they are appropriate to the sales situation.

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 Andrew. 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 Andrew most frequently.

Do:

- Leave time for relating, socializing.
- Give him time to verify reliability of your comments--be accurate and realistic.
- Support your communications with correct facts and data.
- Provide testimonials from people he sees as important.
- Take your time and be persistent.
- Take time to be sure that he is in agreement and understands what you said.
- Talk about him, his goals and opinions he finds stimulating.
- Be prepared.
- Be sincere and use a tone of voice that shows sincerity.
- Provide ideas for implementing action.
- Keep conversation at discussion level.
- Use scheduled timetable when implementing new action.
- Give him time to ask questions.

DON'TS ON COMMUNICATING

This section of the report is a list of things NOT to do while communicating with Andrew. Review each statement with Andrew 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:

- Legislate or muffle--don't overcontrol the conversation.
- Leave decisions hanging in the air.
- Talk to him when you're extremely angry.
- Talk down to him.
- Drive on to facts, figures, alternatives or abstractions.
- Push too hard, or be unrealistic with deadlines.
- Take credit for his ideas.
- Don't be haphazard.
- Use testimonies from unreliable sources.
- Talk in a loud voice or use confrontation.
- Kid around too much, or "stick to the agenda" too much.
- Make promises you cannot deliver.

PERCEPTIONS

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

"See Yourself As Others See You"

SELF-PERCEPTION

Andrew usually sees himself as being:

Enthusiastic
Charming
Persuasive

Outgoing
Inspiring
Optimistic

OTHERS' PERCEPTION

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

Self-Promoting
Overly Optimistic

Glib
Unrealistic

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

Overly Confident
Poor Listener

Talkative
Self-Promoter

KEYS TO MOTIVATING

This section of the report was produced by analyzing Andrew'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 Andrew and highlight those that are present "wants."

Andrew wants:

- Sales environment with emphasis on peace and harmony.
- Flattery, praise, popularity and strokes.
- People who understand his reasons for not wanting to argue.
- To be trusted.
- Participation in meetings on future planning.
- Rewards to support his dreams.
- A support system to do the detail work.
- Work assignments that provide opportunity for recognition.
- A leader to follow and one who sets good examples.
- Freedom from conflict and confrontation.
- To work with people with whom he can trust.
- Freedom to talk and participate in sales meetings.

KEYS TO MANAGING

In this section are some needs which must be met in order for Andrew 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 Andrew and identify 3 or 4 statements that are most important to him. This allows Andrew to participate in forming his own personal management plan.

Andrew needs:

- To maintain focus on results and not sacrifice productivity just to make everyone happy.
- Objectivity in managing a sales territory.
- People to work and associate with.
- Quality sales aids.
- To be more direct and less subjective.
- Training to handle sales objections.
- Participatory management.
- A way to say "no" when he feels "no" to the demanding customers.
- Quality products or services to sell.
- Objectivity when dealing with customers because of his high trust level.
- To focus conversations on work activities--less socializing.
- Methods to translate ideas into action.
- Assistance in selling new or difficult customers.

NATURAL AND ADAPTED SELLING STYLE

Andrew'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.

PROBLEMS - CHALLENGES (Natural)

Andrew uses a laid-back and peaceful approach to selling. He tends to help prospects solve their problems in a reactive and team-oriented manner. He tends to be unobtrusive and avoids confronting potential buyers.

PROBLEMS - CHALLENGES (Adapted)

Andrew sees no need to change his sales approach from his basic style as it is related to solving problems and challenges.

PEOPLE - CONTACTS (Natural)

Andrew's natural style is to use persuasion and emotion to the extreme. He is positive and seeks to win by the virtue of his oral skills. He will try to convince you that what he is saying is not only right, but is exactly what is needed. He displays enthusiasm for almost everything with every prospect.

PEOPLE - CONTACTS (Adapted)

Andrew 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

PACE - CONSISTENCY (Natural)

Andrew's natural style prefers a sales environment that can take advantage of his relaxed demeanor, and patience is looked at as a requirement to win. He enjoys follow-up and follow-through. He resists selling new products until proven to his standards.

PACE - CONSISTENCY (Adapted)

Andrew feels that the sales environment doesn't require him to alter the way he deals with activity level and consistency.

PROCEDURES - CONSTRAINTS (Natural)

Andrew is comfortable on a sales team that sells high quality, desirable products. He will not exaggerate on the facts and data and wants his prospects to hear all the facts and figures in the sales process. He will follow company policy even if others fail to do so.

PROCEDURES - CONSTRAINTS (Adapted)

Andrew sees the need to be his own person and may attempt to sidestep rules to achieve results. He feels a need to personalize his sales presentation to allow for creative selling techniques.

ADAPTED STYLE

Andrew 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.

- Using a calculated approach during presentations.
- Adaptable in meeting the needs of clients or customers.
- Using much data and sales aids for presentations.
- Using humor as a way of coping with conflict.
- Verbally stressing the benefits of his product or service.
- Being a good listener.
- Using great social strengths in approaching new prospects.
- Presenting an agreeable demeanor to clients or customers.
- Excited about available new products or services.
- Using persuasive skills.
- Exhibiting excitement about his service or product.
- Generating enthusiasm in others.
- Skillfully using humor to persuade his clients or customers.

AREAS FOR IMPROVEMENT

In this area is a listing of possible limitations without regard to a specific job. Review with Andrew 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.

Andrew has a tendency to:

- Be more concerned with popularity than sales results.
- Not answer objections completely, or tap dances around the objections.
- Need to be more factually-oriented and talk a bit slower.
- Tell the complete story and miss closing opportunities.
- Give away products or services to make client happy.
- Be more concerned with popularity than tangible results, if popularity is rewarded.
- Dislike call reports, etc.

SELLING TIPS

This section provides suggestions on methods which will improve Andrew'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, Andrew 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.

When selling to a person who is ambitious, forceful, decisive, strong-willed, independent and goal-oriented:

- 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."

Factors that will create tension:

- Talking about things that are not relevant to the issue.
- Leaving loopholes or cloudy issues.
- Appearing disorganized.

When selling to a person who is magnetic, enthusiastic, friendly, demonstrative and political:

- 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.

Factors that will create tension:

- Being curt, cold or tight-lipped.
- Controlling the conversation.
- Driving on facts and figures, alternatives, abstractions.

SELLING TIPS

When selling to a person who is patient, predictable, reliable, steady, relaxed and modest:

- Begin with a personal comment--break the ice.
- Present yourself softly, nonthreateningly and logically.
- Earn their trust--provide proven products.

Factors that will create tension:

- Rushing headlong into the interview.
- Being domineering or demanding.
- Forcing them to respond quickly to your questions.

When selling to a person who is dependent, neat, conservative, perfectionist, careful and compliant:

- Prepare your "presentation" in advance.
- Stick to business--provide fact to support your presentation.
- Be accurate and realistic--don't exaggerate.

Factors that will create tension:

- Being giddy, casual, informal, loud.
- Wasting time with small talk.
- Being disorganized or messy.

ACTION PLAN for Self-Development

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)