



SFA

PREVUE SFA

Performance Appraisal Report

Sales Development Format

Examinee : - MICHAEL LEAVITT
Company: - ABC Industries
Position: - Sales Representative
Date: - September 7, 2010

Prevue Success Factor Analysis Management Report -

CONTENTS:

- SUCCESS FACTOR ANALYSIS - ANALYST COMMENTARY
- BEHAVIORAL PROFILE CATEGORY ANALYSIS
- CUSTOMIZED FACILITATION INTERVIEW
- PERFORMANCE COACHING & DEVELOPMENT
- WORKING CHARACTERISTICS
- MANAGER'S RECOMMENDED ACTION PLAN

CONFIDENTIAL

SAMPLE REPORT

- ANALYST REVIEW & COMMENTARY -

Examinee: Michael Leavitt
Company: ABC Industries
Job Title: Sales Representative
Date: 09/07/10
Basic Prevue Benchmark Rating: 70.00 Above Average

Analyst Rating Considerations:

Low level Word aptitude.
Education meets or exceeds minimum requirements of the job.
Current Employee, Development mode.
Work experience within normal range.
Average/Marginal numerical/math aptitude.
Well developed People Skills.
Well developed capacity for working with data and reports.
Strong aptitude for working with equipment and machinery.

Sales Strategy Index Assessment Administered

- TOTAL ANALYST-LINK RATING - **

Category: Sales

61.74 Very Good



Achievement	Task	Sales Focus	Diligence	Total
51.88	51.67	60.00	57.50	55.26

VALIDITY: Above Average. Assessment may be considered accurate and valid.

** Analyst-link rating includes Prevue job suitability rating plus analyst reviews using statistical job specific averages.

Notes:

UNDERSTANDING THIS REPORT

IMPORTANT: The Analyst-Link Commentary analysis that follows uses the Prevue Benchmark for this position along with a review by our analysts, taking into account, education, work-history, stability, intelligence, and other factors. Whilst the Prevue rating is totally benchmark driven and may contain highly focused organizational preferences, the Analyst-Link rating compares the examinee to successful people in a similar type of job using SFA National Statistical Averages. The Analyst-link rating evaluates overall job suitability in an impartial and global manner. The Analyst-Link rating will often be higher or lower than the Prevue Benchmark rating.

■ HOW TO USE THIS REPORT:

The report is divided into two sections. Part One, labeled as CONFIDENTIAL is for use by Management. Part Two, labeled as "Development Information" is intended to be Distributed to the employee for use as part of the facilitation and performance development program.

■ THE PURPOSE OF THIS REPORT:

The Prevue Appraisal Report (PAR) is designed to provide information that will assist Management in understanding the candidate's unique profile. The goal of this report is to provide insight to better understand the employee's approach to the job, the organization, and the work environment. The PAR also provides insight into the candidate's personality and a wide range of important work related characteristics. Properly matching the employee to the job is beneficial to the organization and to the candidate, as job matching virtually enhances job satisfaction, reduces turnover, and can be a catalyst for high levels of performance and productivity.

■ BENCH MARKING:

The Job Suitability Survey submitted by management is used to define the behavioral, motivational, and skill requirements of the job and create the percentile rank showing JOB SUITABILITY. The acceptable range for each trait or competency is shaded in green. Special attention should be paid, and the facilitation interview should be focused, on any trait where the candidate tests below, or is less than the benchmark for the job. Likewise, carefully examine traits that are far in excess of the requirements of the job (*two points or more*) to make certain the employee will be comfortable within the constraints of the job.

■ THE FACILITATION INTERVIEW:

This report includes a series of Interview Questions that are custom designed and specific to the examinee. Management should use the recommended questions as a guide and focus on those most important to success on the job. The quantity and level of intensity of the interview questions should vary depending on level of responsibility required by the job. Make careful notes of the examinee's responses. Both the Manager and the employee should complete an action plan for improvement for use during the facilitation interview.

■ WHERE DOES THE INFORMATION IN THIS REPORT COME FROM?

The information in this report is derived from the candidate's responses to the assessment. This evaluation is comprised of the personality and interest inventories from the validated and reliable ICES Plus Assessment test, a psychometric test battery developed in the early 1990's by View Assessments International under the direction of Dr. David Bartram, one of the world's leading psychometricians. The ICES Plus Assessment is the cornerstone of a number of respected and established employment and vocational assessments. These products have been used to assess more than one million people in North America alone.

BEHAVIORAL PROFILE CATEGORY ANALYSIS

Michael Leavitt

MOTIVATION - DRIVE

Drive to Succeed	56.00
Innovative - Out of the box thinking	45.00
Unafraid to go it alone.	50.00
Overall Approach to the job	30.00
TOTAL Motivation - Drive	45.25 Average

LEADERSHIP:

Team and Group Oriented	50.00
Assertive - Strong willed	60.00
Assertive, in control	60.00
Independent yet Diplomatic	60.00
Well developed People Skills.	80.00
Seeks Solutions	50.00
Unafraid to make significant decisions	56.67
Socially Diplomatic	80.00
Poised, thoughtful, political.	30.00
TOTAL Leadership	58.52 Normal Range
TOTAL Achievement/Leadership	51.88 Normal Range

TASK ORIENTATION:

Average/Marginal numerical/math aptitude.	30.00
Ability to work with Data & Reports	50.00
Working with things	65.00
Organized, Methodical	60.00
Highly conscientious, careful with details	53.33
TOTAL Task	51.67 Normal Range
Cognitive Reasoning - IQ	0.00
Total Task Orientation	51.67 Normal Range

COMMUNICATIONS:

Emotional Intelligence rating not applicable	0.00
Outgoing/Engaging/Social	70.00
Low level Word aptitude.	30.00
Ability to interact with & influence others	80.00
TOTAL Communication	60.00 Normal Range

SALES TRAITS - Persuasive and Influential:

Presentations	70.00	
First Impression with new prospects	50.00	
Competitive -seeks to win	60.00	
Situationally Extroverted, Outgoing.	60.00	
Closing Ability	56.67	
Generally Outgoing	60.00	
Ability to Prospect/seek new business	27.31	
Overall Sales Focus	64.85	Normal Range
Strategic Sales Total Rating	58.50	
TOTAL Selling Skill and Influence	61.68	Normal Range

DILIGENCE - RELIABILITY:

Organized, Methodical	60.00	
Conscientious, Diligent.	60.00	
Conventional, Sequential thinking.	50.00	
Stable, Steady	60.00	
TOTAL - Diligence	57.50	Normal Range
Reliability Register	0.00	
TOTAL Diligence/Reliability	57.50	Normal Range

GROUP INTERACTION:

Independent	40.00	
Competitive	60.00	
Generally Outgoing	60.00	
Socially adept	20.00	
	50.00	
TOTAL Group/Team Interaction	46.00	Below Average

STATE of MIND:

Spontaneous/Erratic		
Reactive not Proactive		
Extroverted		
Overly Reserved		
Emotional		
Restless	70.00	Discuss.
Excitable		
Submissive, Non-participative		
TOTAL State of Mind	70.00	Stress + Job Dissatisfaction

PERFORMANCE DEVELOPMENT

■ COACHING & COUNSELING

MAKE CERTAIN TO DISCUSS ANY ITEM WHERE THE EXAMINEE IS BELOW THE BENCHMARK. ALSO REVIEW ITEMS WHERE THE EXAMINEE IS SUBSTANTIALLY ABOVE THE BENCHMARK AS THIS MAY INDICATE A POOR FIT TO THE JOB,

NOTES:

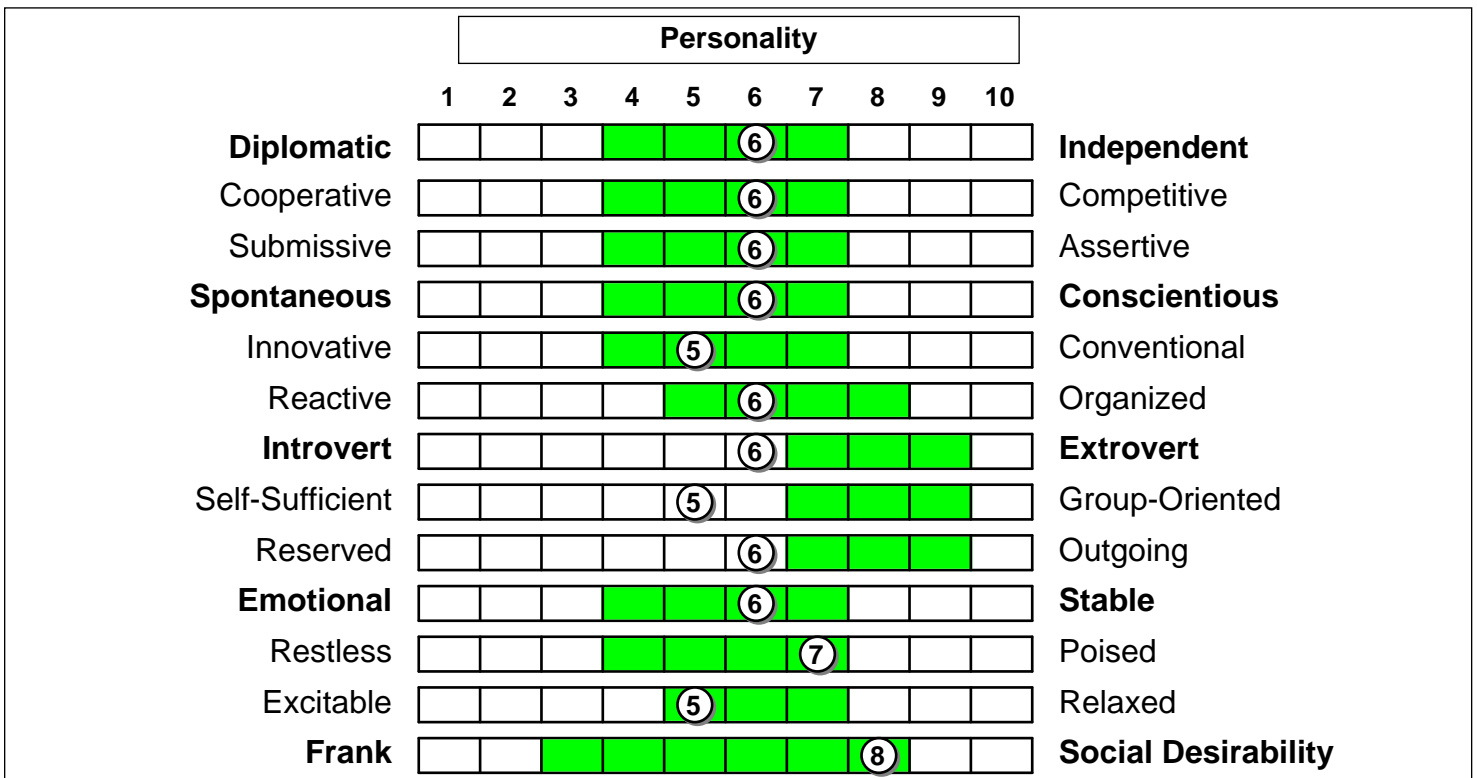
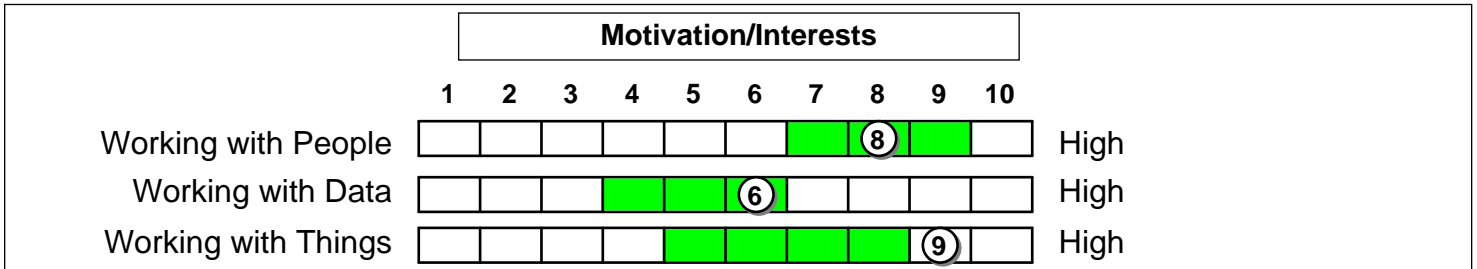
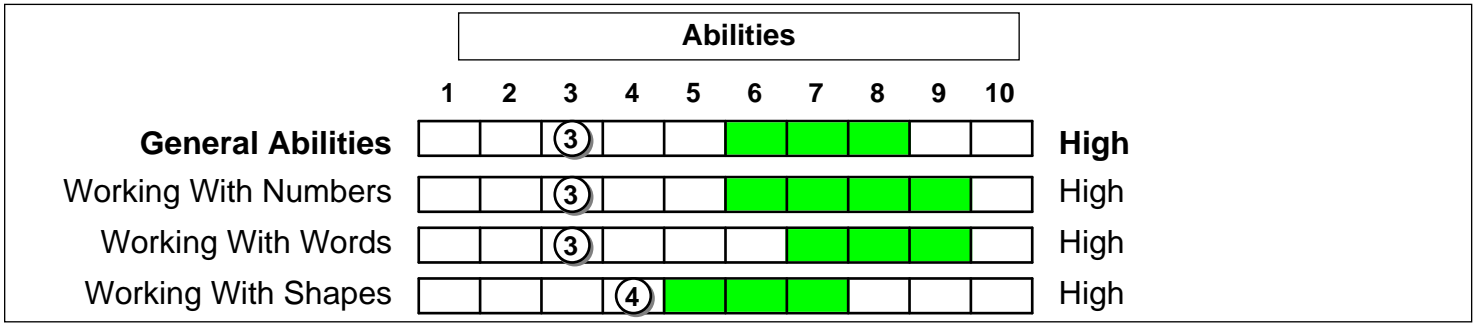
THE PREVUE SALES PERFORMANCE DEVELOPMENT PROGRAM:

**Go to: www.analyst-link.net - Click on the SDP workbook link.
Print workbook # 25 - The Prevue "Rainmaker" Sales Development Guide.
Distribute the report to the examinee. Review the report with them.**

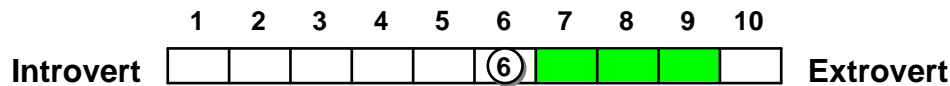
Prevue Benchmark

Michael Leavitt

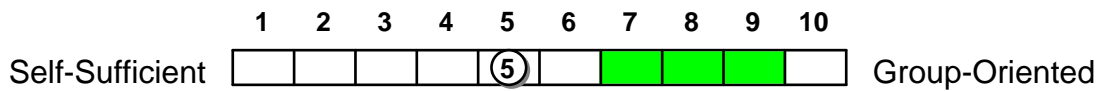
Sales Representative



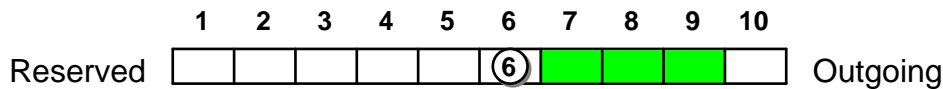
A Prevue benchmark illustrates the required characteristics of various jobs as decided by management. The shadowed areas above graphically represent the benchmark for this Sales Representative position. The number on each scale is Michael Leavitt's actual score.



Mr. Leavitt is moderately extroverted and enthusiastic about being with people yet he also values working alone. Although Mr. Leavitt's social and verbal skills may be above average, any tendency to avoid contact with others or to be unsociable can hinder a Sales Representative's performance. Coaching should build on his interpersonal skills and reinforce congenial behavior.



Although Michael Leavitt prefers working quietly on his own, he can function well with a group in a lively environment. While this equitable approach is praiseworthy, most of the time this Sales Representative will be working with others, either clients or co-workers or both, in a busy locale. Consequently, coaching for Mr. Leavitt should further develop his people skills and his ability to concentrate in the midst of distractions.



Outgoing and talkative with a sociable client, Michael Leavitt can still hold back and be quiet when another client is "strictly business." Mr. Leavitt likely has a good blend of social skills. Coaching should only encourage his innate friendliness. While he will handle most routine tasks well, Mr. Leavitt probably prefers variety and challenge so he may benefit from a rotation of assignments, especially if these require him to use his own judgement and take some risks.

Total Person Description

Michael Leavitt

Sales Representative

Note:

The Total Person is a combination of all the elements Mr. Michael Leavitt completed in his Prevue Assessment.

This person has lower than average ability to work with numbers and words, and average ability to work with shapes. Assignments that require spatial reasoning will be somewhat easier for him. Because he has average spatial skills, he can mentally manipulate shapes and objects fairly well.

While he will be competent with routine spatial tasks, Mr. Leavitt will be slow to learn any new tasks that require numeric or verbal skills. He may well need more instruction, guidance, and time to achieve confidence and competence in ordinary work. For occasional or seasonal tasks, Mr. Leavitt will need to review instructions before each repetition of the task. Because he needs more time to absorb information, he may be at a disadvantage if working with others in a competitive environment. Frequent changes in the work routine will be difficult for him and may result in errors. His below average general ability make Mr. Leavitt a poor choice for any position requiring quick decisions.

Mr. Leavitt is happiest when working with people and also very interested in operating machinery or tools. In addition, he has a strong inclination to work with data, to collect, organize, and analyze information. Nonetheless, he prefers a direct, hands-on approach to problem-solving whenever possible. Michael Leavitt should work in a populated, social environment where he can interact with others and use tools or technology. Regarding computer tasks, because he enjoys performing tasks that require tools or machines, he is better suited to use as many peripheral devices as possible. Being intensely interested in people, he would prefer direct communication with others via Internet connections, E-mail, and word processing. Having a marked interest in data, he would also enjoy working with spreadsheets, databases, or any detailed paperwork. For maximum performance, any long-term assignments for Michael Leavitt should include contact with people. Because of his good motivation to work with all three major factors in the workplace, he should enjoy a wide range of occupations.

Mr. Leavitt is competitive and assertive. While he may be a strong team player, he is likely to want to lead as he enjoys individual recognition. His leadership style is marked by persuasion and encouragement, but he is unafraid of argument and sometimes is willing to take on even controversial issues. In non-threatening situations and with people he knows well, Michael Leavitt will be outspoken and he will vigorously promote his own ideas. On occasion, Mr. Leavitt will use tact and diplomacy to maintain harmony in the workplace.

Michael Leavitt generally operates within established policies and procedures. When necessary, however, he can be flexible and innovative. He is less flexible in the area of scheduling as he prefers to have a plan with a fair degree of detail. This is a strong combination, Mr. Leavitt has the consistency and time management that is the foundation of productivity for most organizations, while at the same time he can adapt to unusual needs or changing circumstances.

Total Person Description

Michael Leavitt

Sales Representative

While Michael Leavitt enjoys being in a group, he is rarely the center of attention. As a team member, he will contribute readily, but he needs time alone to reflect on his efforts and plan his offerings. He has the ability to present his ideas with enthusiasm, while at the same time listening for feedback or discussion. Michael Leavitt would be seen as friendly and easygoing by most fellow workers. Though talkative and outgoing, Michael Leavitt is also self-reliant and does not require constant social interaction. Mr. Leavitt has balanced needs for privacy and companionship. Extended periods of isolation or total immersion in group projects would be equally frustrating for him.

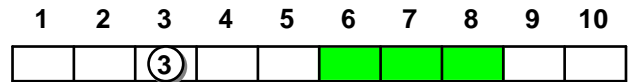
Michael Leavitt has a good combination of emotional awareness in himself and others, and moderate sensitivity to stress. Although usually calm and not easily flustered, Mr. Leavitt can be upset by prolonged stress or exceedingly demanding tasks. In these conditions, he will strive to regain his composure as quickly as possible and his sense of urgency will be in proportion to what needs to be done. While fairly trusting and open with others, he is sensitive to anyone trying to take advantage of him and he will resist such behavior. His reactions to stress are variable but, in the main, he copes well and even does some of his best work when he is stimulated by adversity.

NOTE:

The individual traits on the following pages are descriptions of Mr. Leavitt's characteristics as determined by the Prevue Assessment. The 1 - 10 scoring scale used throughout the Prevue Assessment is called a sten scale. Sten simply means the standard tenth of a normal bell curve. Approximately 16% of the population would have sten scores in the 1 - 3, and 16% in the 8 - 10 ranges. The other 68% of the population will score in the middle ranges 4 - 7.

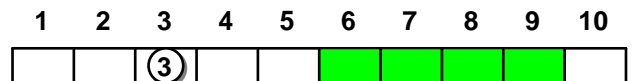
General Abilities

This score indicates that Mr. Leavitt is reasonably competent, but slower to learn than the average person. He may find assimilating new information challenging at times and may have difficulty coping with time pressures. His efficiency will increase when given ample opportunity to develop suitable skills and understand procedures. He may have difficulty with major changes in his working requirements.



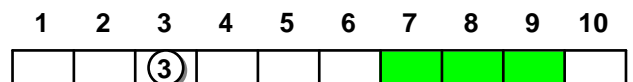
Working With Numbers

Michael Leavitt is in the low average range for Numerical Reasoning. His capacity is typical of the lower one-third of all workers in this skill. This indicates that his speed and accuracy is not typical of the average working adult population when dealing with information derived from simple numbers.



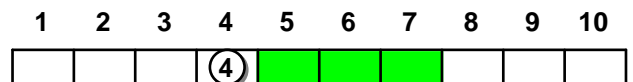
Working With Words

A sten score of three is below the average range of many workers. With this limited capacity, Mr. Leavitt is likely to be somewhat lacking in many written language skills. This could affect his learning speed. When under time pressure he is more likely to make mistakes in tasks requiring reasoning with expression or presentation of written communication.



Working With Shapes

Mr. Leavitt is likely to be reasonably competent in mentally manipulating or visualizing shapes, but may need more time while working in this medium. When under time pressure he is likely to make more mistakes than average.



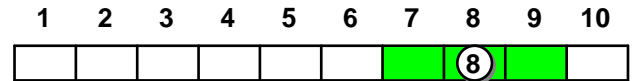
Individual Traits

Michael Leavitt

Sales Representative

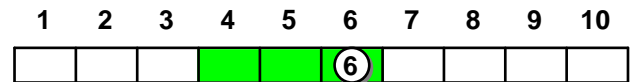
Working With People

Mr. Leavitt is likely to be very interested in work that involves considerable contact with people. This may be at a complex level rather than just making contact. People with scores in this range are unlikely to feel satisfied in jobs in which interaction with people does not play a significant role.



Working With Data

Mr. Leavitt has some interest in working with data. Such a person will be able to relate and balance this limited interest in data to those tasks in the job that require working with people or working with machinery and equipment. He would not necessarily feel the need to work with data to form the major part of his job.



Working With Things

Michael Leavitt has an extremely high level of interest in work that involves inanimate objects such as machinery, tools and equipment. Such people are likely to be interested in a hands-on approach to the design and management of things.



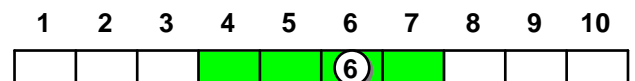
Diplomatic / Independent

Mr. Leavitt shows balance between a desire to compete and win, and a wish to coordinate team goals. He may occasionally be controversial and argumentative when advancing his own point of view, but in other circumstances will be more concerned with maintaining the team spirit and team effort. Such people are good at getting things done while respecting the needs of those around them.



Cooperative / Competitive

He describes himself as a person who is competitive and plays to win. He is a cooperative team member. Such individuals seek compromise between their own achievements, and the need to maintain relationships with others.



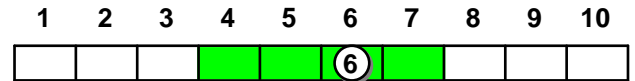
Individual Traits

Michael Leavitt

Sales Representative

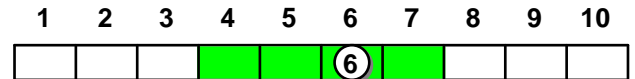
Submissive / Assertive

You will find, depending on the situation or the people involved, Michael Leavitt can be assertive and outspoken. In groups he may promote himself as the leader.



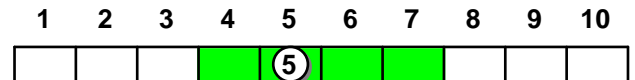
Spontaneous / Conscientious

This individual will be dependable, while striving to do things well in the most expedient manner. You will find that Mr. Leavitt will consider the rules and work within them, rather than ignore or break them. This may lead to innovative solutions without making radical changes.



Innovative / Conventional

Mr. Leavitt is balanced in his attitude toward change and innovation. While happy to be working in a traditional manner and following the rules, he can be flexible and accept change when necessary.



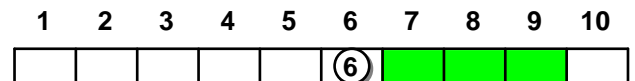
Reactive / Organized

Being reasonably well organized and able to work in a controlled manner, he can also be flexible. He will be able to respond very well to some unpredictable events.



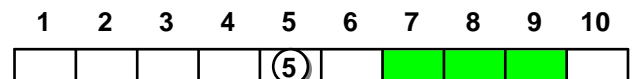
Introvert / Extrovert

Individuals like Mr. Leavitt show moderate levels of enthusiasm and liveliness, contributing to social interaction without drawing undue attention to themselves.



Self-Sufficient / Group-Oriented

While he is someone who occasionally enjoys a stimulating work environment, he requires time to reflect and enjoy his own company.



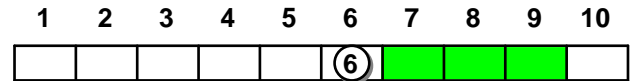
Individual Traits

Michael Leavitt

Sales Representative

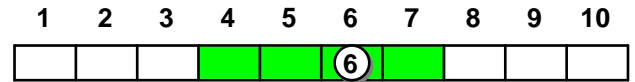
Reserved / Outgoing

He can be talkative and outgoing. He would prefer some variety in his work. These people like to choose the situations in which they will take center stage, as they are comfortable in the company of others, but they do not seek constant attention from others.



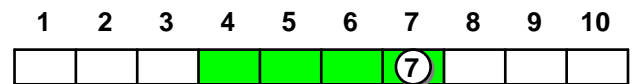
Emotional / Stable

In most situations, Michael Leavitt accepts people in a calm and stable manner. There will be circumstances when he becomes apprehensive and emotional, even wary about some people, particularly their motives. In general, he is secure in himself, remaining quite relaxed under moderate stress.



Restless / Poised

Michael Leavitt is fairly calm and unruffled. A Sales Representative like this will remain objective in all but the most difficult work related situations.



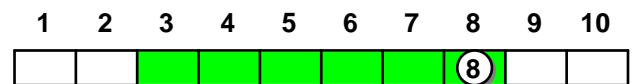
Excitable / Relaxed

In response to most circumstances, people with this score will remain calm and relaxed. It is unlikely that they would worry or become anxious when things do not go well. Any stress under pressure is likely to be moderate. Such individuals will not always assume the best of other people and will feel the need to check their motives at times.



Social Desirability

Michael Leavitt typically presents a positive image and conforms to social expectations. If this high score is the result of a need to present a socially acceptable, rather than an open picture, then scores on some of the other scales may have been influenced.



VALIDITY INTRODUCTION:

- The rules for identifying patterns of responses in the Personality Section of the Prevue Assessment which might be "invalid" include systematic, but non-meaningful response patterns, omissions and excessive use of the "B" answer option. Systematic, but non-meaningful response patterns occur when the distribution of the responses differ from the norm and are considered unusual. The omission rule occurs if more than three responses are omitted in a given scale, making the results appear more average than they are. The "B" answer rule is affected by the total number of "B" responses selected. The candidate had the choice of an "A", "B", or "C" for every question in the Personality Section of the Prevue Assessment. The second option, the "B" choice, is always an unsure or in-between answer.

VALIDITY COMMENTARY:

- The total number of "B" responses chosen by the candidate in the course of completing the Prevue Assessment Questionnaire, including questions that were not answered, was 6.
- This number of "B" choices is within acceptable levels and the results of the Personality section of this report had meaningful response patterns. Therefore the data presented in this Prevue Assessment can be considered accurate and reliable.

BEST PRACTICE RECOMMENDATIONS:

- **Assessment Administration:** Best practice protocol recommends that assessments be administered to candidates in a controlled environment under the supervision of a proctor to ensure that:
 - The person who completes the Assessment is in fact the candidate;
 - A candidate's responses to the Assessment questions are not affected by collusion with others or by other actions that would invalidate the Assessment;
 - The supervisor is able to address unexpected conditions or problems affecting a candidate and to provide reasonable accommodation for candidates where required;

Where an Assessment is administered without the recommended supervision, the accuracy of the report cannot be guaranteed. If the report is a significant consideration in any final selection or other high stakes decision, you might wish to have the candidate retake the Prevue Assessment in a controlled environment;

For more information on the administration of the Prevue Assessment, please see "Administering the Prevue Assessment" in the Prevue User Guide posted at www.prevueassessments.com.

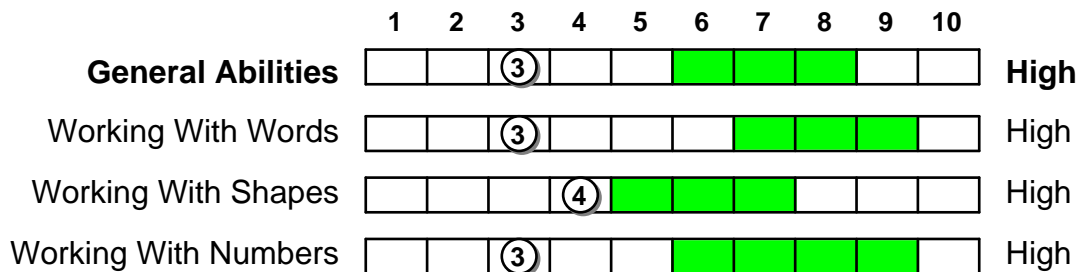
- **Assessment Weighting:** The weight given to the Prevue Assessment in any human resource selection or other high stakes decision should not exceed one-third of the total process. The remainder of the process, including the candidate's work history, interview, background checks, etc., should be considered in association with the results of this report.
- **Ensure Fairness:** When properly administered, the use of the Prevue Assessment will help to ensure that applicants are treated fairly without regard to race, colour, religion, sex or national origin. The Prevue Assessment was designed and developed to conform with the human rights legislative and best practice requirements prevailing in the various countries where the Prevue Assessment is distributed. This includes the EEOC Guidelines, the Americans for Disabilities Act and the standards for test development and administration published by the American Psychological Association, the British Psychological Society and the Association of Test Publishers.

How to Use the Prevue Assessment in the Coaching / Training Process

One of the challenges management faces in coaching and training individuals is the process of correctly identifying developmental needs. The Prevue Personal Training Report provides specific coaching and training information by simply matching Mr. Leavitt's assessment to this Sales Representative benchmark. For each particular requirement in the benchmark the manager or training professional is provided with a starting point that identifies the appropriate skills or competencies required for the Sales Representative position.

Coaching Areas Off the Benchmark

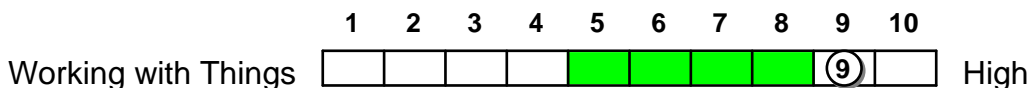
The following are areas where Mr. Leavitt did not match this benchmark. A brief explanation of the benchmark and score result is followed by suggestions and statements which may assist you in coaching his future performance as a Sales Representative.



It will be evident that Mr. Leavitt does not fall within the Benchmarks for all of the dimensions of Abilities for this Sales Representative position.

A score above any of the Abilities Benchmarks will not generally be detrimental to overall performance. If this is the case for Mr. Leavitt, consideration should be given to whether the position provides him with sufficient challenge, stimulation and opportunity.

A score below any of the Abilities Benchmarks suggests Mr. Leavitt may have difficulty in quickly and effectively addressing and completing those aspects of the job where he is below the Benchmark. Courses at local colleges coupled with tutoring in the subject areas where Mr. Leavitt has scored below the Benchmark should be considered.



With a strong preference for work with objects such as electronic devices, machinery, and tools, Michael Leavitt will be interested in tasks such as organizing and managing inventory or equipment. Given any new technology, he will likely apply himself whole-heartedly. Although his interest in working with tools and equipment is advantageous in many situations, few people who are in this Sales Representative position are as enthusiastic as Mr. Leavitt. Coaching should ensure that he does not distance himself from his peers by using gadgets in place of communication.

WORKING CHARACTERISTICS

■ **APPROACH TO THE WORK ENVIRONMENT**

REVIEW TO MAKE CERTAIN THE APPROACH TO THE WORK ENVIRONMENT IS CONSISTENT WITH THE REQUIREMENTS OF THE JOB.

NOTES:

Working Characteristics

Michael Leavitt

This report provides additional information on certain Working Characteristics of Mr. Leavitt. This summary will be significant for Managers, Supervisors, and Human Resource Professionals. The Working Characteristics are derived from personality traits as referred to in the Prevue Assessment. Distinct from the Prevue Benchmark, these work-related features help to answer questions such as:

- 1. Is Mr. Leavitt inclined to take risks?**
- 2. Does he live to work or work to live?**
- 3. Does he prefer a fixed salary or flexible income?**

This information, in conjunction with the Prevue Assessment and the job interview, previous work history, and a background check, will assist with Human Resource decisions regarding Mr. Leavitt.

Working Characteristics Summary

How does he want to be paid?	Prefers a modest salary with a good bonus or commission plan.
How important is work to him?	Puts a very high value on work and on being employed.
Does he make risky decisions?	May prefer swift and novel solutions but will curb this tendency if circumstances demand sound planning.
How does he deal with change?	Prefers to follow the tried and tested but recognizes change is sometimes required.
What is his perception of the world?	Tends to see opportunity and excitement in new ventures.

Working Characteristics

Compensation Preference

This Working Characteristic identifies whether Mr. Leavitt is more motivated to work by either performance-based remuneration or a fixed wage or salary. This helps to determine if he will be satisfied with the remuneration this position offers. It will also expedite the design of a compensation package that will encourage his best performance.

Is Mr. Leavitt better motivated by fixed salary or by an incentive remuneration program?

Prefers Salary

<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	-------------------------------------	--------------------------

Prefers Bonus

- Mr. Leavitt enjoys gambling on performance goals, but he also wants some regular income.
- A modest salary with a good bonus or commission plan should suit him well.
- While enjoying the excitement of incentive-based earnings, he will not be inclined to risk things of real importance.
- He likes the challenge of new ventures as long as he can think things through and be ready for potential problems.

Focus on Work

This Working Characteristic provides information on the importance of work for Michael Leavitt. Some people define themselves by their work. They are often labeled workaholics. Others see work as a means to an end, rather than an end in itself. While such differences are not a function of personality, they are related to it. This Working Characteristic is particularly significant for assessing whether Michael Leavitt will fit with the culture of the workplace or with the team that he may be assigned to.

Does Mr. Leavitt live to work or work to live?

Works to Live

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
--------------------------	--------------------------	--------------------------	-------------------------------------

Lives to Work

- Michael Leavitt probably defines himself by his job.
- He puts strong emphasis on professional accountability.
- His leisure and social activities may be related to his career.
- Domestic arrangements will usually be changed in preference to altering his work schedule.
- He greatly values work and being employed.

Working Characteristics

Tolerance for Risk

This Working Characteristic indicates the likelihood of Mr. Leavitt engaging in risky behaviors or actions. This attribute will be relevant in determining whether he can accommodate the decisions required in this particular job. It also provides insight regarding his fitness to be a member of an existing team.

Is Mr. Leavitt likely to make risky decisions?

Not Risk Inclined

<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
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Risk Inclined

- Michael Leavitt may prefer swift and irregular solutions, but he will curb this tendency if circumstances demand sound planning.
- He is inclined to operate on the premise that "the end justifies the means", but he rarely behaves recklessly.
- Generally, he will avoid spontaneous decisions and will want to balance risks with benefits.
- Clients will approve his willingness to make quick decisions and his ad hoc approach to problem-solving.

Preference for Change

Good performance in some jobs requires a quick response to fast changes, but efficiency in other positions depends on tolerance for routine and working carefully at a steady pace. This Working Characteristic explains where Mr. Leavitt fits on the continuum between these diametric requirements.

Does Mr. Leavitt prefer to work in rapidly changing circumstances or with a set routine?

Prefers Routine

<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Prefers Change

- Mr. Leavitt prefers tried and tested methods, but he recognizes change is sometimes required.
- He likes a well-defined schedule in a structured environment.
- He is inclined to be insular and may be disconcerted by confrontations or strident requests.
- He usually reacts well to rational changes in personnel or corporate structure.
- He typically adopts old policy for a new agenda rather than invent new policy.

Working Characteristics

Perception of the World

Michael Leavitt's attitude to day-to-day events in the workplace is important to his overall job performance. This Working Characteristic identifies whether he will approach problems and issues with optimism or with caution. The job itself defines which approach is appropriate.

How does Mr. Leavitt perceive and approach problems and events?

Sees Drawbacks Sees Opportunities

- Michael Leavitt tends to see opportunity and excitement in new ventures.
- He generally sees the world as a safe place with manageable dangers.
- He reacts quickly to problems partly because he does not fear the consequences of fast action.
- He will readily try new methods to boost performance and productivity.
- He will not adopt uncommon practices merely because they are novel: he must be persuaded they are also timely and effective.

PREVUE 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 the Prevue 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!*

ACTION PLAN - Manager's Recommendations

NAME: _____

List three areas in which you see the need to direct focus effort along with your suggested plan of action to achieve the desired goal. Select improvement items from the Analyst-Link Commentary, Development Guide, the text report, 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)

SFA

PREVUE SFA
Performance Development Report
Employee Copy

Examinee : - **MICHAEL LEAVITT**
Company: - ABC Industries
Position: - Sales Representative
Date: - September 7, 2010

Sales Development Information - Understanding -Self
Prevue Success Factor Analysis

>Part 1

CONTENTS:

- **INDIVIDUAL TRAITS**
- **THE TOTAL PERSON** (UNDERSTANDING YOUR OVERALL APPROACH TO THE JOB)
- **SELF-DEVELOPMENT ACTION PLAN**
- **SALES STRATEGY INDEX**

SAMPLE REPORT

UNDERSTANDING THIS REPORT

■ **THE PURPOSE OF THIS REPORT:**

This report is designed to provide information that will assist your manager, coach, or facilitator in understanding your unique profile. It can also help you to better understand yourself and your approach to your job and to the work environment. The report provides insight into your personality and important work related characteristics. It is intended to assist in the coach-client relationship by providing the starting point for a meaningful discussion about your values, needs, and objectives. Further, the report should assist your facilitator in asking pertinent questions and providing relative feedback and ideas that are tailored to you. Our goal is to assist you in developing greater effectiveness on the job and increasing your overall job satisfaction.

■ **WHERE DOES THE INFORMATION IN THIS REPORT COME FROM?**

The information in this report is derived from your responses to the Prevue Assessment. This assessment is comprised of the personality, cognitive, and interest inventories from the validated and reliable ICES Plus Assessment test, a psychometric test battery developed in the early 1990's by View Assessments International under the direction of Dr. David Bartram, one of the world's leading psychometricians. The ICES Plus Assessment is the cornerstone of a number of respected and established employment and vocational assessments. These products have been used to assess more than one million people in North America alone.

■ **RECOMMENDATION:**

We ask that you review this assessment carefully, particularly the your ranking in each category. The standard benchmark for your particular job is shaded. The benchmark was compiled from information submitted by management and is specific to the job.

■ **DEVELOPMENT PROGRAM:**

Attached to this report please find a blank "Action Plan" with space for listing three areas for improvement. Select three things that, after reading this report, you feel should be changed to improve your performance at work, increase your value to the organization, and enhance your sphere of influence over others. Discuss your goals with your manager, coach, or facilitator.

Development Program

■ **APPROACH TO THE WORK ENVIRONMENT**

PRINT OUT THE DEVELOPMENT PROGRAM WORKSHEET TO MAKE CERTAIN THE APPROACH TO THE WORK ENVIRONMENT IS CONSISTENT WITH THE REQUIREMENTS OF THE JOB.

NOTES:

THE PREVUE SALES PERFORMANCE DEVELOPMENT PROGRAM:

**Go to: www.analyst-link.net - Click on the SDP workbook link.
Print workbook # 25 - The Prevue "Rainmaker" Sales Development Guide.
Complete this workbook and be prepared to review it with your manager.**

Prevue Benchmark

Michael Leavitt

Abilities

1 2 3 4 5 6 7 8 9 10

General Abilities	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	High
Working With Numbers	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	High
Working With Words	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	High
Working With Shapes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	High

Motivation/Interests

1 2 3 4 5 6 7 8 9 10

Working with People	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	High
Working with Data	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	High
Working with Things	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	High

Personality

1 2 3 4 5 6 7 8 9 10

Diplomatic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Independent
Cooperative	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Competitive
Submissive	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Assertive
Spontaneous	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Conscientious
Innovative	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Conventional
Reactive	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Organized
Introvert	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Extrovert
Self-Sufficient	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Group-Oriented
Reserved	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Outgoing
Emotional	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Stable
Restless	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Poised
Excitable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Relaxed
Frank	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Social Desirability

Total Person Description

Michael Leavitt

Note:

The Total Person is a combination of all the elements you completed in your Prevue Assessment.

You have lower than average abilities when working with numbers and words, and an average ability to work with shapes. Assignments that require spatial reasoning will be somewhat easier for you. Because you have average spatial skills, you can mentally manipulate shapes and objects fairly well.

While you will be competent with routine spatial tasks, you may be slow to learn any new tasks that require numerical or verbal skills. You may need more instruction, guidance, and time to achieve confidence and competence in ordinary work.

You are happiest when working with people and also very interested in operating machinery or tools. In addition, you have a strong inclination to work with data, to collect, organize, and analyze information. Nonetheless, you prefer a direct, hands-on approach to problem-solving whenever possible. You should work in a populated, social environment where you can interact with others and use tools or technology. Regarding computer tasks, because you enjoy performing tasks that require tools or machines, you are better suited to use as many peripheral devices as possible. Being intensely interested in people, you would prefer direct communication with others via Internet connections, E-mail, and word processing. Having a marked interest in data, you will enjoy working with spreadsheets, databases, or any detailed paperwork. For maximum performance, any long-term assignments for you should include contact with people. Because of your good motivation to work with all three major factors in the workplace, you should enjoy a wide range of occupations.

You are fairly competitive and assertive. While you may be a strong team player, you are likely to want to lead as you enjoy individual recognition. Your leadership style is marked by persuasion and encouragement, but you are unafraid of argument and sometimes willing to take on even controversial issues. In non-threatening situations and with people you know well, you will be outspoken and will vigorously promote your own ideas. On occasion, you will use tact and diplomacy to maintain harmony in the workplace.

You generally operate within established policies and procedures. When necessary, however, you can be flexible and innovative. You are less flexible in the area of scheduling, as you prefer to have a plan with a fair degree of detail. This is a strong combination: you have the consistency and time management that is the foundation of productivity for most organizations, while at the same time you can adapt to unusual needs or changing circumstances.

While you enjoy being in a group, you are rarely the center of attention. As a team member, you will contribute readily, but you need time alone to reflect on your efforts and plan your offerings. You have the ability to present your ideas with enthusiasm, while at the same time listening for feedback or discussion. Most fellow workers would see you as friendly and easygoing. Though talkative and outgoing, you are also self-reliant and do not require constant social interaction. You have balanced need for privacy and companionship. Extended periods of isolation or total immersion in group projects would be equally frustrating for you.

Total Person Description

Michael Leavitt

You have a good combination of emotional awareness in yourself and others, and moderate sensitivity to stress. Although usually calm and not easily flustered, you can be upset by prolonged stress or exceedingly demanding tasks. In these conditions, you will strive to regain your composure as quickly as possible and your sense of urgency will be in proportion to what needs to be done. While fairly trusting and open with others, you are sensitive to anyone trying to take advantage of you and you will resist such behavior. Your reactions to stress are variable but, in the main, you cope well and even do some of your best work when you are stimulated by adversity.

Individual Traits

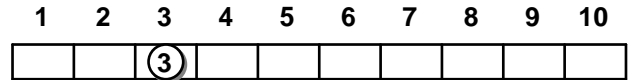
Michael Leavitt

NOTE:

The individual traits on the following pages are descriptions of your characteristics as determined by the Prevue Assessment. The 1 - 10 scoring scale used throughout the Prevue Assessment is called a sten scale. Sten simply means the standard tenth of a normal bell curve. Approximately 16% of the population would have sten scores in the 1 - 3, and 16% in the 8 - 10 ranges. The other 68% of the population will score in the middle ranges 4 - 7.

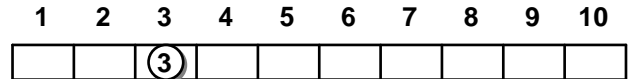
General Abilities

You are competent and prefer to learn new things using repetition. You are likely to be efficient working within a structured environment, particularly where there are opportunities to develop your skills at your own pace.



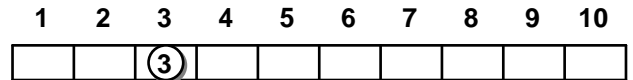
Working With Numbers

You are in the lower range for Numerical Reasoning. For that reason, you are likely to avoid work where information derived from numbers is a major facet.



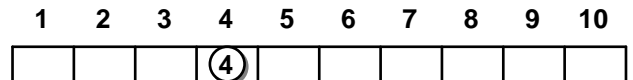
Working With Words

A score of three indicates a lower than average capacity in working with written language. You may feel it necessary to spend more time than others when working with written information.



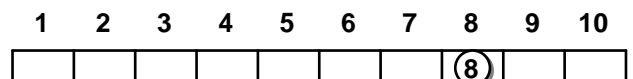
Working With Shapes

Your score places you at the lower end of the mid-range of scores in spatial ability. You have a normal level of speed and accuracy when reasoning with information that involves thinking about manipulating shapes and objects.



Working With People

You are likely to be very interested in work that involves considerable contact with people. This may be at a complex level rather than just making contact. Scores in this range indicate you are unlikely to feel satisfied in jobs in which interaction with people does not play a significant role.

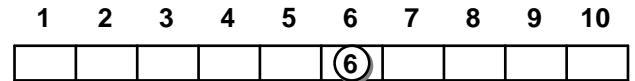


Individual Traits

Michael Leavitt

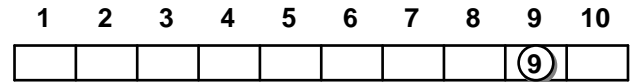
Working With Data

You have an average interest in working with data. You can handle tasks that deal with figures, symbols, statistics, accounts and language. You would be unlikely to enjoy a job that did not provide some opportunity for this type of work.



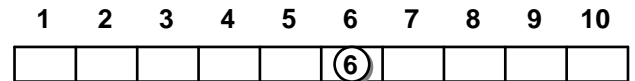
Working With Things

You have an extremely high level of interest in work that involves inanimate objects such as machinery, tools and equipment.



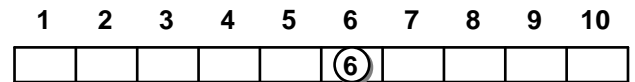
Diplomatic / Independent

People like you show a balance between a desire to compete and win, and a wish to coordinate team goals. You may occasionally be controversial when advancing your own point of view, but in other circumstances you will be more concerned with maintaining the team spirit and team effort. Such people are good at getting things done while respecting the needs of those around them.



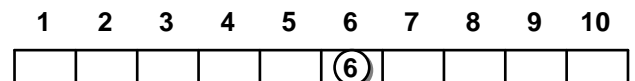
Cooperative / Competitive

You describe yourself as a person who is competitive and plays to win, yet can be a cooperative team member. You seek compromise between your own achievements and the need to maintain relationships with others.



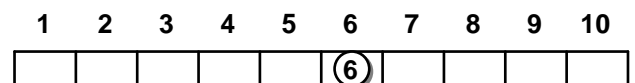
Submissive / Assertive

Depending on the situation or the people involved, you can be assertive and outspoken. In some groups you may promote yourself as the leader.



Spontaneous / Conscientious

This score indicates an individual who will be dependable, while striving to do things well in the most expedient manner. You will consider the rules and work within them, rather than ignore or break them. This may lead to innovative solutions without making radical changes.



Individual Traits

Michael Leavitt

Innovative / Conventional

You are balanced in your attitude toward change and innovation. While happy to be working in a traditional manner and following the rules, you can be flexible and will accept change when necessary.

1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Reactive / Organized

Being reasonably well organized and able to work in a controlled manner, you can also be quite spontaneous. You are able to respond very well to some unpredictable events.

1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Introvert / Extrovert

You show moderate levels of enthusiasm and liveliness, contributing to social interaction without drawing undue attention to yourself.

1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Self-Sufficient / Group-Oriented

While you are someone who occasionally enjoys a stimulating environment, you require time to reflect and enjoy your own company.

1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Reserved / Outgoing

This score indicates that you can be talkative and outgoing. You also would prefer some variety in your work. You choose the situations in which you will take center stage, as you are comfortable in the company of others, but you do not seek constant attention.

1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Emotional / Stable

In most situations, such individuals accept people in a calm and stable manner. In general, you are secure in yourself, remaining quite relaxed under moderate stress.

1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Individual Traits

Michael Leavitt

Restless / Poised

You are fairly calm and unruffled. You will remain objective in all but the most difficult situations.

1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Excitable / Relaxed

In response to most circumstances, individuals such you will remain calm and relaxed. You usually will not worry or become anxious when things do not go well. Stress under pressure is likely to be moderate.

1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Social Desirability

You typically present a positive image that conforms to social expectations.

1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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)



SSi

Sales Skills Index Summary

Examinee : - **MICHAEL LEAVITT**

Company: - ABC Industries

Position: - Sales Representative

Date: - September 7, 2010

>Part 2

INTRODUCTION:

The Sales Skills Index or Sales Strategy Index (SSI) is an advanced assessment designed to measure professional sales ability. It is an updated, and objective analysis of an individuals' understanding of the strategies required to be successful in sales and essentially answers the question - "Can this person sell in a competitive environment?"

Dealing with the issue of whether a person has the skills to sell is an essential component in predicting sales success, it is certainly not the only one. The Sales Skills Index is not intended to be used as the sole determining factor for a career in sales. Behavioral issues, especially self-motivation, achievement, drive, and the ability to influence others are prerequisites to a sales success. Selling Skill training is ineffective without the proper behavioral attitude. Combine this report with the Success Factor Analysis to achieve the ideal analysis tool; that is, a combination of both motivation and skill.

CONTENTS:

- **BASIC SALES SKILLS** - Analysis & Ratings
- **ADVANCED SALES SKILLS** - Analysis & Ratings

SAMPLE REPORT

The SSI identifies sales knowledge in the following categories:

- **Prospecting:** *The first step of any sales system. It is the phase of the sale where prospects are identified, detailed background information is gathered, the physical activity of traditional prospecting is coordinated and an overall strategy for face-to-face selling is developed.*
- **First Impressions - Greeting:** *The first interaction between a prospect and the salesperson. This step is designed to enable the salesperson to display his or her sincere interest in the prospect, and to **gain** positive acceptance and to develop a sense of mutual respect and rapport. It is the first phase of trust building and sets the selling process in motion.*
- **Qualifying/Questions:** *The questioning and detailed needs analysis phase of the sale. This step of selling enables the salesperson to discover what the prospect will buy, when they will buy and under what conditions they will buy. It is allowing the prospect to identify and verbalize their level of interest and specific detailed needs in the product or service the salesperson is offering.*
- **Demonstration:** *In this step, the salesperson should present his or her product in such a way that it fulfills the stated or implied needs or intentions of the prospect as identified and verbalized in the Qualification step.*
- **Influence:** *What people believe enough, they act upon. This step is designed to enable the salesperson to build value and overcome the tendency that many prospects have of placing little belief or trust in what is told to them. It is this phase of the sale that solidifies the prospect's belief in the supplier, product or service and the salesperson.*
- **Close:** *The **final** phase of any selling system. This step encompasses asking the prospect to buy, dealing with objections, handling any necessary negotiation and completing the transaction to mutual satisfaction.*
- **General:** *This area represents an overall understanding of the sales process. Knowledge of the process can lead to a positive attitude toward sales and a commitment to the individual sales steps.*

BASIC SALES STRATEGIES

The information that follows is designed to assist you in interpreting the "Sales Skills Index tm ."

THIS SECTION CONTAINS:

INTRODUCTION

PRIMARY AND SECONDARY EFFECTIVENESS RATING GRAPH

- Measures "Basic" Sales ability -

CATEGORY ANALYSIS

The combination of both primary and secondary sales Skills effectiveness ratings provides broad-based selling skill analysis for:

- Executives and Business Development
- Inside Sales
- Contract or Bid Sales
- Telemarketing Sales
- Account Maintenance (Relationship Sales)
- Route Sales
- Sales trainee

It should be noted that even in cases where General Sales abilities or the overall total exceeds or matches top sales performers, direction of effort should be focused on any skill that is less than the "standard" set by top performers.

Like any profession, selling has a body of knowledge related to successful execution. It is this knowledge that is measured by the Sales Skills Index. Understanding effective sales strategies will lead to success upon implementation of the recommendations contained herein.

UNDERSTANDING SKILL CLUSTERS:

INSIDE SALES - One may usually eliminate Prospecting as a necessary skill for inside sales; however, Demonstration, First Impression, Influence, and Closing are requisite to success.

CONTRACT OR BID SALES - Prospecting is not a vital component of the job, neither is qualifying. The key traits are Influence and First Impression followed by Demonstration, Closing, and high task orientation.

TELEMARKETING SALES - All traits are important but the greatest strength must of necessity be Prospecting.

RELATIONSHIP SALES - Demonstration is often the most vital trait followed by First Impression, Influence, and Closing.

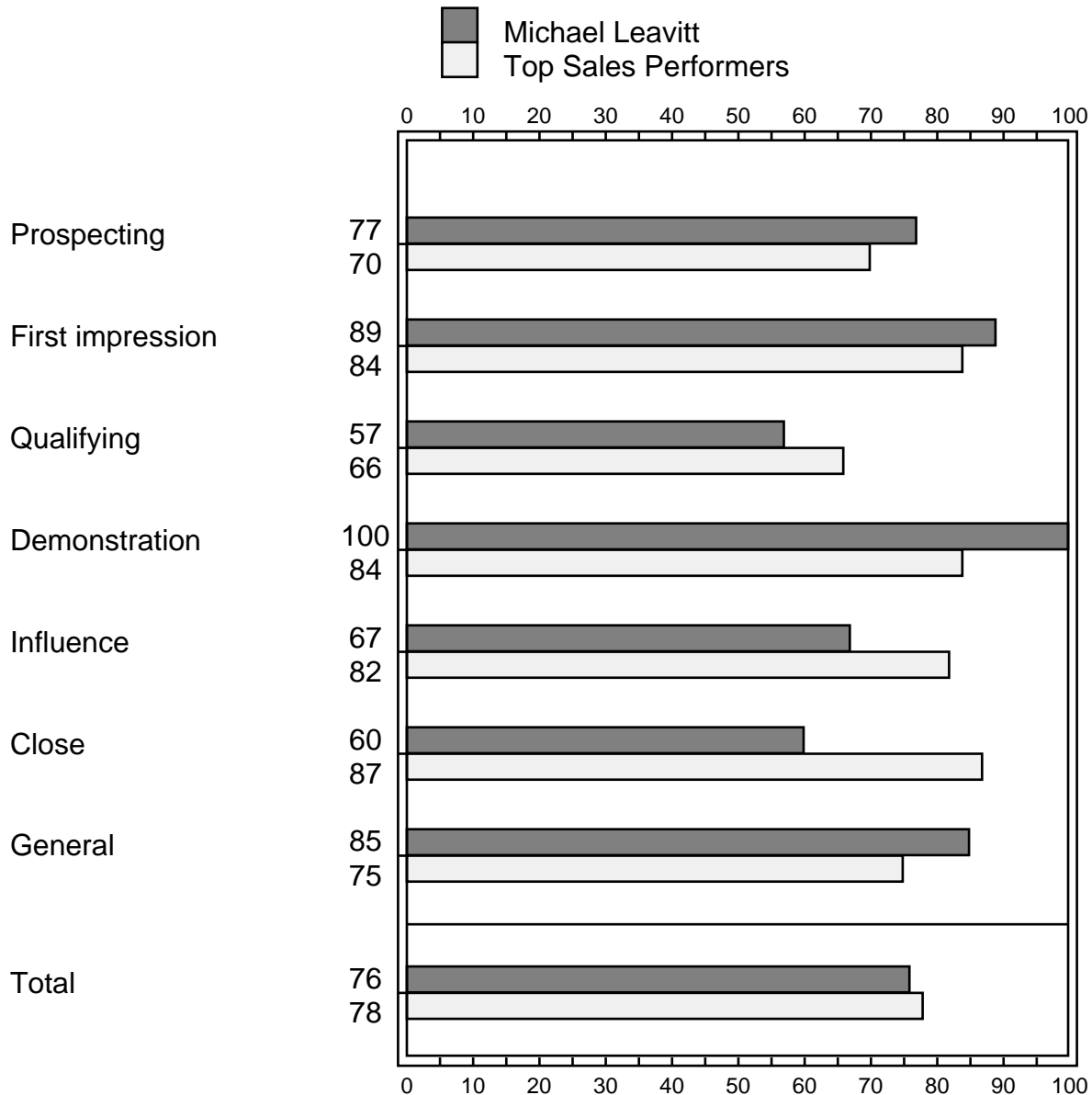
TERRITORY DEVELOPMENT SALES - All traits are important. Pay specific attention to Prospecting, Qualifying, & Closing.



SALES SKILLS INDEX™

PRIMARY AND SECONDARY EFFECTIVENESS RATING

This graph illustrates your overall knowledge of the most and second most effective sales strategies. The higher your score in any segment, the better your broad understanding of the overall sales strategy required in that step of a successful sale.





SALES SKILLS INDEX™

CATEGORY ANALYSIS

Name: **Michael Leavitt**

PROSPECTING / QUALIFY: The first step of any sales system. It is the phase of the sale where prospects are identified, detailed background information is gathered, the physical activity of traditional prospecting is coordinated and an overall strategy for face-to-face selling is developed.

(7/13) 54% of the time you chose the most effective strategy

(3/13) 23% of the time you ranked the second most effective strategy as your first choice

FIRST IMPRESSION / GREETING: The first face-to-face interaction between a prospect and the salesperson, this step is designed to enable the salesperson to display his or her sincere interest in the prospect...to gain positive acceptance and to develop a sense of mutual respect and rapport. It is the first phase of face-to-face trust building and sets the face-to-face selling process in motion.

(2/9) 22% of the time you chose the most effective strategy

(6/9) 67% of the time you ranked the second most effective strategy as your first choice

QUALIFYING / QUESTIONS: The questioning and detailed needs analysis phase of the face-to-face sale, this step of selling enables the salesperson to discover what the prospect will buy, when they will buy and under what conditions they will buy. It is allowing the prospect to identify and verbalize their level of interest and specific detailed needs in the product or service the salesperson is offering.

(3/7) 43% of the time you chose the most effective strategy

(1/7) 14% of the time you ranked the second most effective strategy as your first choice



SALES SKILLS INDEX™

CATEGORY ANALYSIS

Name: **Michael Leavitt**

DEMONSTRATION: The ability of the salesperson to present his or her product in such a way that it fulfills the stated or implied needs or intentions of the prospect as identified and verbalized.

(3/9) 33% of the time you chose the most effective strategy

(6/9) 67% of the time you ranked the second most effective strategy as your first choice

INFLUENCE: What people believe enough, they act upon. This step is designed to enable the salesperson to build value and overcome the tendency that many prospects have to place little belief or trust in what is told to them. It is this phase of the sale that solidifies the prospect's belief in the supplier, product or service and salesperson.

(4/6) 67% of the time you chose the most effective strategy

(0/6) 0% of the time you ranked the second most effective strategy as your first choice

CLOSE: The final phase of any selling system. This step is asking the prospect to buy, dealing with objections, handling any necessary negotiation and completing the transaction to mutual satisfaction.

(3/10) 30% of the time you chose the most effective strategy

(3/10) 30% of the time you ranked the second most effective strategy as your first choice

GENERAL: This area represents an overall understanding of the sales process. Knowledge of the process can lead to a positive attitude toward sales and a commitment to the individual sales steps.

(5/13) 39% of the time you chose the most effective strategy

(6/13) 46% of the time you ranked the second most effective strategy as your first choice

ADVANCED SALES STRATEGIES

CONTENTS:

■ **PRIMARY EFFECTIVENESS RATING GRAPH** - (Advanced Selling Skills)

■ **QUESTION ANALYSIS**

Ratings that meet or exceed those of Top Sales Performers in the Primary (or Advanced) effectiveness graph indicate competency in:

- Brokerage/Financial/Insurance Sales
- Outside Sales (Territory Development)
- Placement Sales
- Consulting Sales
- Travel Sales
- Trade Show Selling

Direction of effort should be focused on any skill that is less than the "standard" and where training is recommended.

SKILL INTERACTIONS

PROSPECTING - is the key to advanced selling. Low scores in this skill often indicate burnout or Call Reluctance. Behaviorally, prospecting is linked to Challenge and Drive

QUALIFYING - is the often considered the key skill. Expend the greatest effort on those who have a need for the product (or service being sold) and have the authority to make the purchasing decision. Link qualifying with sound closing techniques.

FIRST IMPRESSION / DEMONSTRATION - these skills work together to add credibility to the sales presentation. Critique your presentation on video. Include Social Skills here: Manners, Dress, Grooming, Vocabulary, Interpersonal skills, and Communication ability.

INFLUENCE - is the precursor to Closing. Influence is akin to the behavioral trait, persuasiveness. Those who know their product, the competition, and their clients' needs, can often become strategically aligned with their customers and influence the purchasing decision.

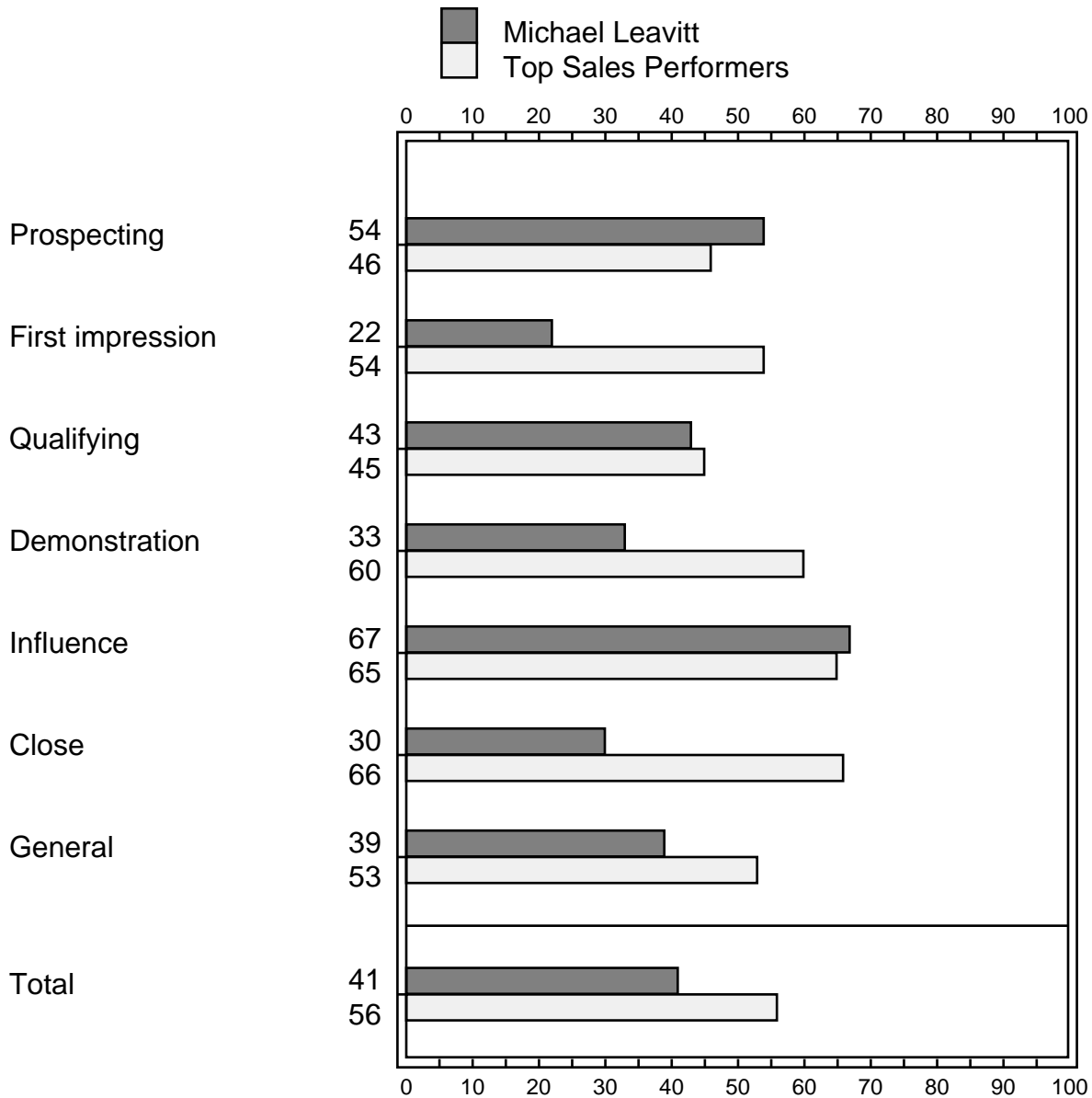
CLOSING - requires a certain amount of intuitiveness. Knowing when to close is as important as knowing a variety of closing techniques. Closing the sale is validation of your skill as a salesperson.



SALES SKILLS INDEX™

PRIMARY EFFECTIVENESS RATING

The following graph illustrates YOUR understanding of the most effective sales strategy in a series of sales situations. Research validates that understanding and applying an effective sales strategy is directly related to sales success. The higher the score in any particular area the stronger your specific understanding of what is required to be successful in the sales process.





SALES SKILLS INDEX™

QUESTION ANALYSIS

Name: **Michael Leavitt**

QUESTION ANALYSIS

- 27 times chose the MOST effective strategy
- 25 times chose the SECOND most effective strategy as #1
- 10 times chose the THIRD most effective strategy as #1
- 5 times chose the LEAST effective strategy as #1

LEAST EFFECTIVE STRATEGY ANALYSIS

Please review the following questions. In these situations you selected the least effective strategy as the most effective strategy. For each question listed, the most effective strategy is provided for your review.

1. You have completed your presentation and were told that you'd know something in two weeks. In two weeks you discover your prospect bought from a competitor. Where did you make your mistake?
 - A. You did not create enough value for your product or service.

8. You approach your prospect and discover the person you are seeing is not in a position to make any type of buying decision. You should:
 - A. Continue to sell in order to develop an internal advocate.

13. You and your prospect have invested sufficient time with your presentation and your prospect says, "Everything looks good to me." You should:
 - B. Ask what you have to do to get started.



SALES SKILLS INDEX™

QUESTION ANALYSIS

21. When a prospect says, "We don't normally make decisions at this time of year," you should:

A. Ask "What time of year are budget decisions made?"

59. "I want to think about it" is:

D. An objection.