



# Success Factor Analysis™



**CONFIDENTIAL**

**Executive Summary** - Analyst-Link Job Development Program

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SFA - Performance Development Format - Part one of two

**SAMPLE REPORT**



# Success Factor Analysis

THIS PERFORMANCE DEVELOPMENT REPORT IS PRINTED IN TWO PARTS

## CONTENT

### 1. Confidential Executive Summary:

This summary is designed to show the behavioral match of the examinee as compared to successful salespeople in the same type of job. This portion of the 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. TRAINING & DEVELOPMENT INSIGHTS:

This is the "Training" section of the Success Factor Analysis. It is designed to assist the sales manager and the employee in understanding the behavioral and motivational requirements of the job and to help identify areas where training effort should be focused. This section consists of a behavioral hierarchy analysis of strengths and weaknesses and the (c) Success Insights development text. It contains valuable insight into the "work-style" of the examinee to help them understand their approach to the job and their response to the work environment. The header atop each page contains information for use.

#### NOTE:

Pay close attention to the "Value to the Organization" and "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.*

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## Understanding the SFA

### Page 1: The Success Factor Analysis

*Shows the SFA rating and ranking of the examinee compared to successful people in the same type of job numerically and graphically.*

### Page 2: Manager's Report

*Shows behavioral and motivational strength and includes analyst comments along with Natural and adapted work-style profile.*

*For an in-depth explanation of work-styles go to [www.analyst-link.net](http://www.analyst-link.net)  
Click on "Administrator" Scroll down to The Value of Intelligence . . . .  
Click on the "Understanding work styles" link.*



# SUCCESS FACTOR ANALYSIS

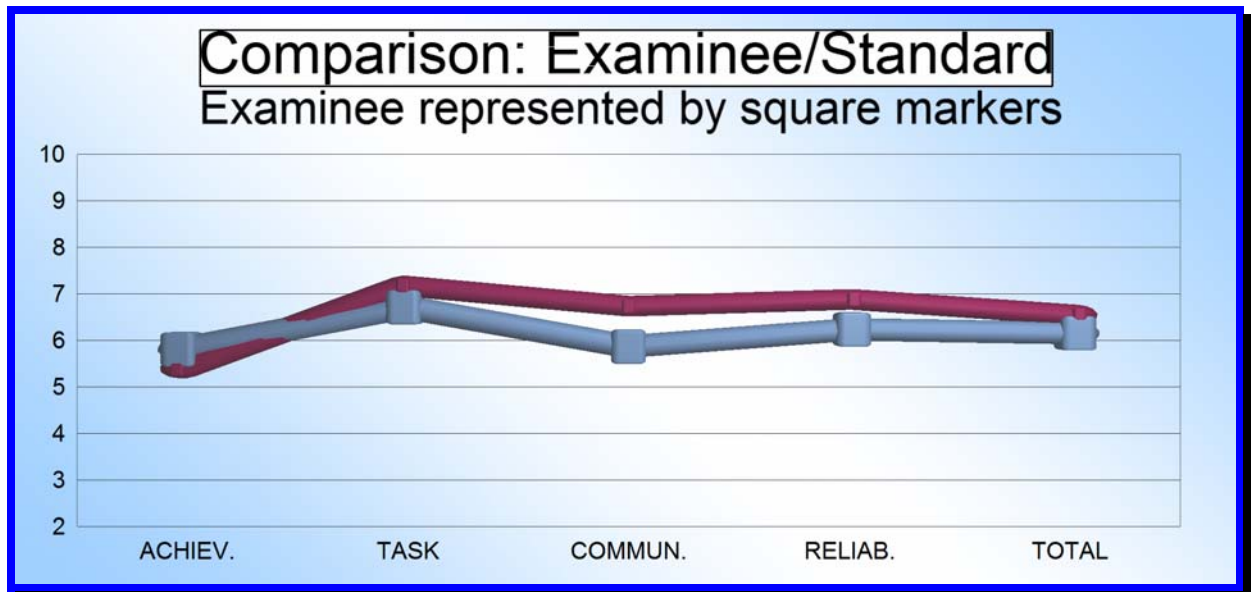
RANK as *Customer Service*

Examinee: **Susan Bailey**

**Overall Job Suitability: 65% Acceptable**

\*Stress Exists

<i>Post-Hire Standard:</i>		<i>Examinee/Comparison to Standard:</i>		
Achievement Factors:	5.43	5.83	Marginal	-Higher
Task/Detail Factors:	7.17	6.72	Good	-Lower
Communication Factors:	6.74	5.89	Marginal	-Lower
Reliability Factors:	6.89	6.25	Acceptable	-Lower
COMPENSATING FACTORS:	6.56	6.17	Acceptable	-Lower



Company: **ABC Industries**

NOTES: \_\_\_\_\_

# MANAGER'S REPORT

ABC Industries

Susan Bailey

65% **Acceptable**

Customer Service

L/T Employee

## BEHAVIORAL RANKINGS:

Achievement Factors:	5.83	Marginal	-----	Match to "Standard"
Task/Detail Factors:	6.72	Good	-----	-Higher
Communication Factors:	5.89	Marginal	-----	-Lower
Reliability Factors:	6.25	Acceptable	-----	-Lower
Compensating Factors:	6.17	Acceptable		
Behavioral Inventory:	6.32	Acceptable		
Overall Stress Factors:	*Stress Exists			
Advancement Potential:	Possible			

## CURRENT FOCUS

### BEHAVIORAL TOTALS

Standard Examinee

### TRAINING REQUIREMENTS

>>  
>

Achievement Traits-	5.43	<b>5.83</b>	- None
Following Procedure-	7.41	<b>6.83</b>	- Some training recommended.
Task Propensities-	7.17	<b>6.72</b>	- Overall training recommended.
Consistency/Reliability-	6.89	<b>6.25</b>	- Some training recommended.
Communication Traits-	6.74	<b>5.89</b>	- Overall training recommended.

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

## ANALYST COMMENTS:

- Achievement traits are in decline. Provide guidance and training.
- Provide methods and systems for handling documents and paperwork.

- Examinee's Natural work-style = "Relating Supporter " adapting toward "Supporting Relater"

\* Provide detailed instructions and support.

- All ratings based on a scale of 1 to 10. 5.00 is a passing albeit marginal grade.

Ratings: 3=Poor, 4=Below Average, 5=Marginal, 6=Acceptable, 6.5=Good 7=Above Average, 8=Excellent, 9=Superior

> = Key job parameter traits. >> = Most important job trait as selected by test administrator.

<--> Compensating Factors point spread - Standard/Examinee -0.38 Supervision: Average

Number of Jobs in 10 years: 4 Total Working Years: 10 Education: 14

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NOTES: \_\_\_\_\_



# Success Factor Analysis

## Understanding the SFA (Continued)

### *Page 3: Detailed Development Guide*

*This page shows comparison of candidate traits to the standard (successful people in the same type of job) and indicates areas in need of improvement ranging from minor issues to those requiring Professional Assistance.*

*For best effectiveness focus on developing no more than three issues at a time.*

### *Page 4: Natural/Adapted Behavioral Focus*

*This page indicates any stress issues and shows the examinee's current focus. Review to determine if their focus is positive.*

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#### *Development Information:*

#### ***Reducing Turnover - Orientation training***

*Creating a "Communications Link" with their manager is the key to developing a positive attitude about the job and the company.*

*To assist in this effort, an orientation workbook called the "Success Discovery Process" (SDP) was created. The SDP is customized for this assessment. Print a copy for the examinee and ask they fill it out completely. Afterwards facilitate the SDP with them. Keep in mind that they will usually disagree with any negative statement so listen carefully as to why they disagree. The goal here is to create a "Communications Link" so the employee views you as a coach and a mentor, not a disciplinarian. Remember, you as a manager and coach are the key to reducing turnover!*

***Go to: [www.analyst-link.net](http://www.analyst-link.net) for your free On-boarding workbook  
Click on the Navigation Link Labeled - SDP workbook  
Select and Print out Guide ( 8 )***



## DETAILED DEVELOPMENT GUIDE

Prepared for: **Susan Bailey**

As: *Customer Service*

**- INSTRUCTIONS :**

Carefully review the training and development recommendations listed on this page.

Discuss them with your manager or facilitator.

Keep in mind they are "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 Examinee		Insert Natural/Adapted->	
ACHIEVEMENT PROPENSITIES:				
> Results Oriented/Decisions	5.15	5.58		-
Sense of Urgency	5.71	6.08		-
Setting Priorities/Planning	6.07	6.58		-
Self Confidence/Drive	4.80	5.08		-
<b>Achievement Trait Average-&gt;</b>	5.43	<b>5.83</b>		
<b>FOLLOWING PROCEDURE-&gt;</b>	7.41	<b>6.83</b>	- Some training recommended.	-
TASK ORIENTATION:				
> Thoroughness/Follow-Through	7.13	6.67	- Some training recommended.	-
Documentation/Paperwork	6.88	6.25	- Some training recommended.	-
> Precise/Detail Orientation	7.51	7.25	- Minor review helpful.	-
>> <b>Task Propensity Average-&gt;</b>	7.17	<b>6.72</b>		
> <b>RELIABILITY/CONSISTENCY-&gt;</b>	6.89	<b>6.25</b>	- Some training recommended.	-
COMMUNICATION TRAITS:				
> Motivating Others/Persuasive	5.71	5.17	- Some training recommended.	-
Sociability/Diplomacy	7.52	6.67	- Some training recommended.	-
Empathy/Responsiveness	7.00	5.83	- Focused effort necessary.	Moderate
<b>Communication Average-&gt;</b>	6.74	<b>5.89</b>		

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**NOTES:** \_\_\_\_\_

***Natural/Adapted Behavioral Focus***

**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 adaptations 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:
> Results Oriented/Decisions	5.75	5.50 <----- Declining	-
Sense of Urgency	6.75	5.75 <----- Declining	-
Setting Priorities/Planning	6.75	6.50 <----- Declining	-
Self Confidence/Drive	5.25	5.00 <----- Declining	-
<b>Achievement Trait Average-&gt;</b>	6.13	5.69 <b>&lt;--- Declining Achievement Focus</b>	
<b>Following Procedure-&gt;</b>	6.50	7.00 <b>-----&gt; Increased Focus</b>	-
> Thoroughness/Follow-Through	6.50	6.75 -----> Increased Focus	-
Documentation/Paperwork	6.25	6.25 == Static-	-
> Precise/Detail Orientation	7.25	7.25 == Static-	-
<b>&gt;&gt; Task Propensity Average-&gt;</b>	6.67	6.75 <b>-----&gt; Increased Overall Task Focus</b>	
> Reliability/Consistency->	6.25	6.25 == Static-	-
> Motivating Others/Persuasive	6.50	4.50 <----- Declining	-
Sociability/Diplomacy	6.00	7.00 -----> Increased Focus	-
Empathy/Responsiveness	4.50	6.50 -----> Increased Focus	Moderate
<b>Communication Average-&gt;</b>	5.67	6.00 <b>-----&gt; Increased Communication Focus</b>	

**NOTES:**

# FACILITATION GUIDELINES & TECHNIQUES

*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 text report to the employee. The Coach portion includes a job suitability rating. 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!



## Manager/Facilitator Action Plan 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:

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---

Time frame to achieve this goal:

---

---

• **SECOND FOCUS AREA:** \_\_\_\_\_

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

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---

Time frame to achieve this goal:

---

---

• **THIRD FOCUS AREA:** \_\_\_\_\_

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

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---

Time frame to achieve this goal:

---

---

Date: / /

Action Plan Commitment Agreement by: \_\_\_\_\_ (Examinee)

Supported by: \_\_\_\_\_ (Manager/Facilitator)



# *Success Factor Analysis*

## ***Success Insights*** <sup>tm</sup> ***Behavioral and Motivational Analysis***



### ***EXAMINEE DEVELOPMENT GUIDE***

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*SFA - Performance Development Format*

***SAMPLE REPORT***

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# Success Factor Analysis

## Behavioral Hierarchy An Analysis of your strengths and weaknesses

### **INFORMATION:**

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.

### **BEHAVIORAL HIERARCHY:**

The Examinee's key traits are shown on this page starting with their greatest strengths and ending with traits that may require additional development.

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

### **On-boarding and Orientation training for the new-hire.**

To assist development of a new-hire download our orientation workbook called the "Success Discovery Process" (SDP). The SDP is customized for this assessment.

To download the appropriate workbook:

Go to: [www.analyst-link.net](http://www.analyst-link.net) for your free On-boarding workbook  
Click on the Navigation Link Labeled - **SDP workbook**  
**Select and Print out Guide (8)**



# BEHAVIORAL HIERARCHY

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

## 1. CUSTOMER ORIENTED



## 2. FREQUENT INTERACTION WITH OTHERS



## 3. COMPETITIVENESS



## 4. FREQUENT CHANGE



## 5. ORGANIZED WORKPLACE



## 6. ANALYSIS OF DATA



## 7. VERSATILITY



## 8. URGENCY





## VALUE TO THE ORGANIZATION

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

- Creative approach to problem solving.
- People-oriented.
- Dependable team player.
- Service-oriented.
- Big thinker.
- Works for a leader and a cause.
- Patient and empathetic.
- Self-reliant.



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

- Little conflict between people.
- A stable and predictable environment.
- An environment in which she may deal with people on a personal, intimate basis.
- Work with a results-oriented team.
- Freedom from restrictive rules.
- Forum for her ideas to be heard.



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*



## GENERAL CHARACTERISTICS

*Based on Susan's responses, the report has selected general statements to provide a broad understanding of her work style. These statements identify the basic natural behavior that she brings to the job. That is, if left on her own, these statements identify HOW SHE WOULD CHOOSE TO DO THE JOB. Use the general characteristics to gain a better understanding of Susan's natural behavior.*

Susan requires many good reasons, as well as the benefits involved, before agreeing to making changes. Under pressure, Susan can be extremely tenacious and will stay with her commitments until she is satisfied. When challenged, she becomes more objective. Others see her as a good neighbor, since she is always willing to help those she considers to be her friends. When people are involved, she may not always be precise about the use of her time. Relationships with others are warm, personal and lasting. She strives to maintain the status quo, since she tends to resist change, particularly when it is unexpected or sudden. She can be spontaneous and casual in familiar circumstances. The familiar atmosphere allows spontaneity when she is in her comfort zone. Susan prefers to help and support others rather than compete against them. She is good at maintaining relationships both on and off the job. She manifests a caring and warm demeanor to the people in her life.

Susan often thinks over major decisions before acting. Once she has arrived at a decision, she can be tough-minded and unbending. She has made her decision after gathering much data, and she probably won't want to repeat the process. She prefers to plan her work and work her plan. Others may find it refreshing to have her on their team. She can be sensitive to the feelings of others and is able to display real empathy for those who are experiencing difficulties. Susan finds making decisions easier when she knows that others she respects are doing the same thing; she then has a feeling of stability and "family." She is good at analyzing situations that can be felt, touched, seen, heard, personally observed or experienced. Her motto



## GENERAL CHARACTERISTICS

is, "facts are facts." She is persistent and persevering in her approach to achieving goals.

Susan is quick to pick up on group dynamics and skilled in fitting in with a group. She brings both speaking and listening skills to the group. She will be open with those she trusts; however, reaching the required trust level may take time. She likes a friendly, open style of communication. She likes to know what is expected of her in a working relationship and have the duties and responsibilities of others who will be involved explained. Communication is accomplished best by well-defined avenues. Susan usually is considerate, compassionate and accepting of others; however, on some occasions can become stubborn. Stubbornness surfaces when her ideals and beliefs are confronted.



## 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 Susan. Read each statement and identify the 3 or 4 statements which are most important to her. We recommend highlighting the most important "DO's" and provide a listing to those who communicate with Susan most frequently.*

Do:

- Define clearly (preferably in writing) individual contributions.
- Define the problem in writing.
- Look for her oversights.
- Use a motivating approach, when appropriate.
- Move casually, informally.
- Ask "how?" questions to draw her opinions.
- Appeal to the benefits she will receive.
- Provide solutions--not opinions.
- Show sincere interest in her as a person. Find areas of common involvement and be candid and open.
- Provide personal assurances, clear, specific solutions with maximum guarantees.
- Clarify any parameters in writing.



## DON'TS ON COMMUNICATING

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

- Be domineering or demanding; don't threaten with position power.
- Force her to respond quickly to your objectives. Don't say "Here's how I see it."
- Offer assurance and guarantees you can't fulfill.
- Be abrupt and rapid.
- Muffle or overcontrol.
- Patronize or demean her by using subtlety or incentive.
- Keep deciding for her, or she'll lose initiative. Don't leave her without backup support.
- Let her overpower you with verbiage.
- Ramble.



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

## "See Yourself As Others See You"

### SELF-PERCEPTION

Susan usually sees herself as being:

Considerate  
Good-Natured  
Team player

Thoughtful  
Dependable  
Good listener

### OTHERS' PERCEPTION

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

Nondemonstrative  
Unconcerned

Hesitant  
Inflexible

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

Possessive  
Detached

Stubborn  
Insensitive



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

Susan wants:

- Recognition for loyalty and long service.
- Flattery, praise, popularity and strokes.
- To be trusted.
- Freedom to talk and participate on the team.
- Participation in meetings on future planning.
- A support system to do the detail work.
- Constant appreciation, and a feeling of security on the team.
- A manager who practices participative management.
- Public recognition of her ideas and results.
- A friendly work environment.
- Rewards to support her dreams.



*In this section are some needs which must be met in order for Susan to perform at an optimum level. Some needs can be met by herself, 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 Susan and identify 3 or 4 statements that are most important to her. This allows Susan to participate in forming her own personal management plan.*

Susan needs:

- A tolerant boss.
- Reassurances that she is doing the job right.
- A quality product in which to believe.
- Bottom-line measurement.
- Shortcut methods that don't affect quality of the work.
- Rewards in terms of tangible things, not just flattery and praise.
- A manager who delegates in detail.
- A warm and friendly work environment.
- A feeling of belonging--to know how important she is to the team.
- Support in doing excessive detail work.
- To be introduced to the new employees.
- To set professional and family goals.



## NATURAL AND ADAPTED STYLE

*Susan's natural style of dealing with problems, people, pace of events and procedures may not always fit what the environment needs. This section will provide valuable information related to stress and the pressure to adapt to the environment.*

Natural	PROBLEMS - CHALLENGES	Adapted
<p>Susan is somewhat conservative in her approach to solving problems. She will accept challenges by being quite calculating in her response to the problem or challenge. Susan will be quite cooperative by nature and attempt to avoid confrontation as she wants to be seen as a person who is "easy" to work with.</p>	<p>Susan sees no need to change her approach to solving problems or dealing with challenges in her present environment.</p>	

Natural	PEOPLE - CONTACTS	Adapted
<p>Susan is sociable and optimistic. She is able to use an emotional appeal to convince others of a certain direction. She likes to be on a team and may be the spokesman for the team. She will trust others and likes a positive environment in which to relate.</p>	<p>Susan sees no need to change her approach to influencing others to her way of thinking. She sees her natural style to be what the environment is calling for.</p>	



## NATURAL AND ADAPTED STYLE

Natural	PACE - CONSISTENCY	Adapted
<p>Susan is comfortable in an environment in which there is a relaxed demeanor, or one in which patience is looked at as a virtue. She prefers to complete one task before starting the next and prefers an environment that is predictable.</p>	<p>Susan sees a need to be deliberate and steady. She will change if the new direction is meaningful and consistent with the past, attempting to resist change for change's sake.</p>	

Natural	PROCEDURES - CONSTRAINTS	Adapted
<p>Susan is independent by nature and somewhat self-willed. She is open to new suggestions and can, at times, be seen as somewhat freewheeling. She is most comfortable in an environment where the constraints can be "loosened" for certain situations.</p>	<p>Susan sees the need to be open-minded about rules. However, she is aware and sensitive to the implications of not following rules and procedures.</p>	



*Susan sees her present work environment requiring her to exhibit the behavior listed on this page. If the following statements DO NOT sound job related, explore the reasons why she is adapting this behavior.*

- Contacting people using a variety of modes.
- Adherence to established guidelines and procedures.
- Motivating people to take action by using persuasive skills.
- Consistency of task performance.
- Freedom from confrontation.
- Flexibility.
- Making tactful decisions.
- Diplomatic cooperation in team interaction.
- Limited or prepared changes in routine.
- Logical solutions.
- Exhibiting patience and good listening skills.



## AREAS FOR IMPROVEMENT

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

Susan has a tendency to:

- Tendency to underestimate her abilities.
- Not project a sense of urgency--others may not feel the pressure to help immediately.
- Dislike change if she feels the change is unwarranted.
- Be dependent on others for decisions, even if she knows she is right.
- Avoid accountability by overstating the complexity of the situation.
- Not let others know where she stands on an issue.
- Need help in prioritizing new assignments.



*This section provides suggestions on methods which will improve Susan's communications with others. The tips include a brief description of typical people with whom she may interact. By adapting to the communication style desired by other people, Susan will become more effective in her communications with them. She may have to practice some flexibility in varying her communication style with others who may be different from herself. This flexibility and the ability to interpret the needs of others is the mark of a superior communicator.*

<p>When communicating with a person who is dependent, neat, conservative, perfectionist, careful and compliant:</p> <ul style="list-style-type: none"> <li>● Prepare your "case" in advance.</li> <li>● Stick to business.</li> <li>● Be accurate and realistic.</li> </ul> <p>Factors that will create tension or dissatisfaction:</p> <ul style="list-style-type: none"> <li>● Being giddy, casual, informal, loud.</li> <li>● Pushing too hard or being unrealistic with deadlines.</li> <li>● Being disorganized or messy.</li> </ul>	<p>When communicating with a person who is ambitious, forceful, decisive, strong-willed, independent and goal-oriented:</p> <ul style="list-style-type: none"> <li>● Be clear, specific, brief and to the point.</li> <li>● Stick to business.</li> <li>● Be prepared with support material in a well-organized "package."</li> </ul> <p>Factors that will create tension or dissatisfaction:</p> <ul style="list-style-type: none"> <li>● Talking about things that are not relevant to the issue.</li> <li>● Leaving loopholes or cloudy issues.</li> <li>● Appearing disorganized.</li> </ul>
<p>When communicating with a person who is patient, predictable, reliable, steady, relaxed and modest:</p> <ul style="list-style-type: none"> <li>● Begin with a personal comment--break the ice.</li> <li>● Present your case softly, nonthreateningly.</li> <li>● Ask "how?" questions to draw their opinions.</li> </ul> <p>Factors that will create tension or dissatisfaction:</p> <ul style="list-style-type: none"> <li>● Rushing headlong into business.</li> <li>● Being domineering or demanding.</li> <li>● Forcing them to respond quickly to your objectives.</li> </ul>	<p>When communicating with a person who is magnetic, enthusiastic, friendly, demonstrative and political:</p> <ul style="list-style-type: none"> <li>● Provide a warm and friendly environment.</li> <li>● Don't deal with a lot of details (put them in writing).</li> <li>● Ask "feeling" questions to draw their opinions or comments.</li> </ul> <p>Factors that will create tension or dissatisfaction:</p> <ul style="list-style-type: none"> <li>● Being curt, cold or tight-lipped.</li> <li>● Controlling the conversation.</li> <li>● Driving on facts and figures, alternatives, abstractions.</li> </ul>



# SELF HELP ACTION PLAN

**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:

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Time frame to achieve this goal:

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- **SECOND FOCUS AREA:** \_\_\_\_\_

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

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Time frame to achieve this goal:

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- **THIRD FOCUS AREA:** \_\_\_\_\_

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

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Time frame to achieve this goal:

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Date: / /

Action Plan Commitment Agreement by: \_\_\_\_\_ (Examinee)

Supported by: \_\_\_\_\_ (Manager/Facilitator)