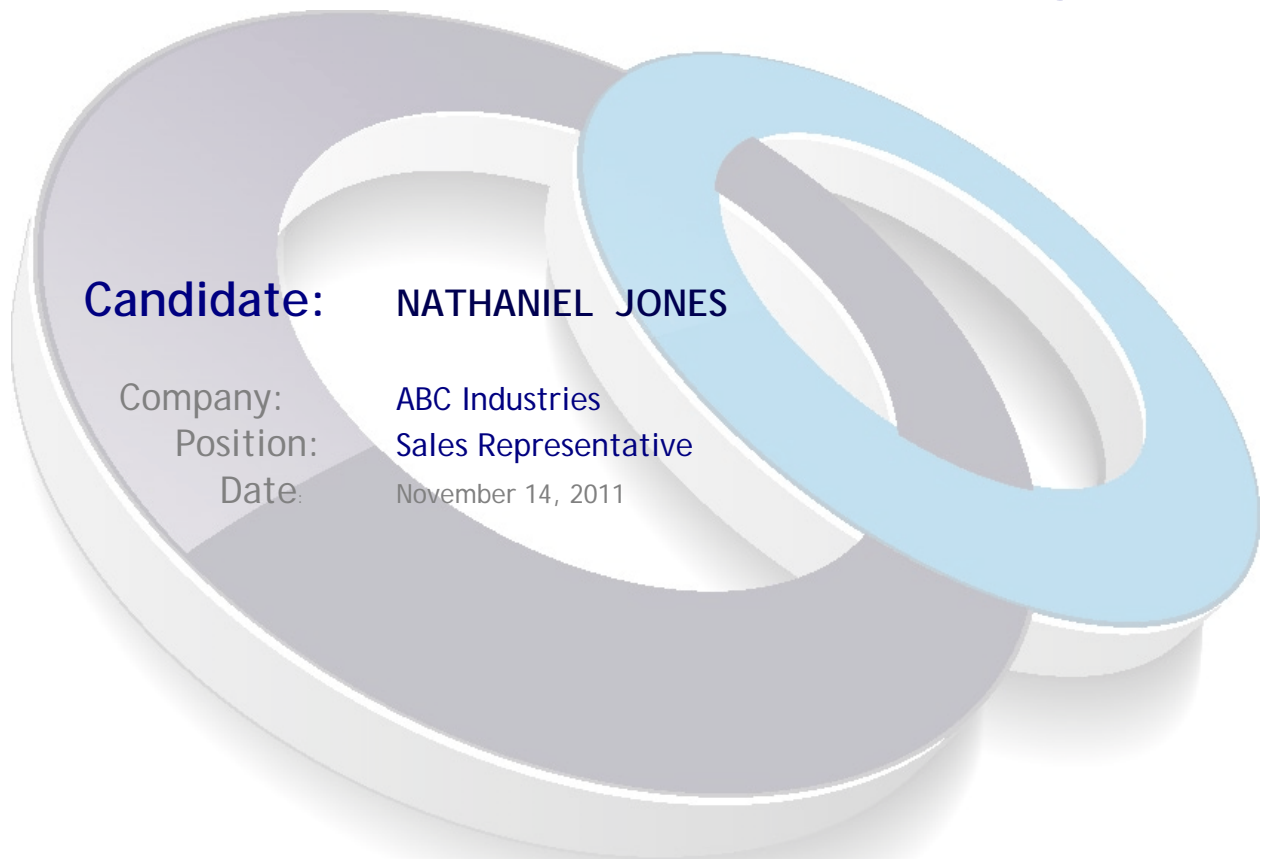




Success Factor Analysis™



Candidate: NATHANIEL JONES

Company: ABC Industries
Position: Sales Representative
Date: November 14, 2011

CONFIDENTIAL

Executive Summary - Analyst-Link Sales Suitability Analysis

SFA - Sales Format - Part one of two

SAMPLE REPORT



Success Factor Analysis

This Pre-employment SALES 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 candidate as it contains a job suitability ranking based on your determination of the behavioral requirements of the job (*as submitted to us on the Analyst-Link "Activator" form*).

2. SALES TRAINING & DEVELOPMENT INSIGHTS:

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.

***For information on facilitating new-hires go to www.analyst-link.net
Click on the "Administrator" navigation link and scroll down to "SDP
Workbooks." Select Workbook 00 "Facilitation Instructions"***

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
Click on "Administrator" Scroll down to The Value of Intelligence
Click on the "Understanding work styles" link.*



SUCCESS FACTOR ANALYSIS

RANK as *Sales Associate*

Examinee: **Nathaniel Jones**

*** Trainable**

Overall Job Suitability: 59% Marginal

Pre-Hire Standard:

Achievement Factors: 7.68

Task/Detail Factors: 5.60

Selling Factors: 6.80

Reliability Factors: 4.83

COMPENSATING FACTORS: **6.23**

Examinee/Comparison to Standard:

7.14 **Above Average** -Lower

5.28 **Marginal** -Lower

6.59 **Good** -Lower

3.40 **Poor** -Lower

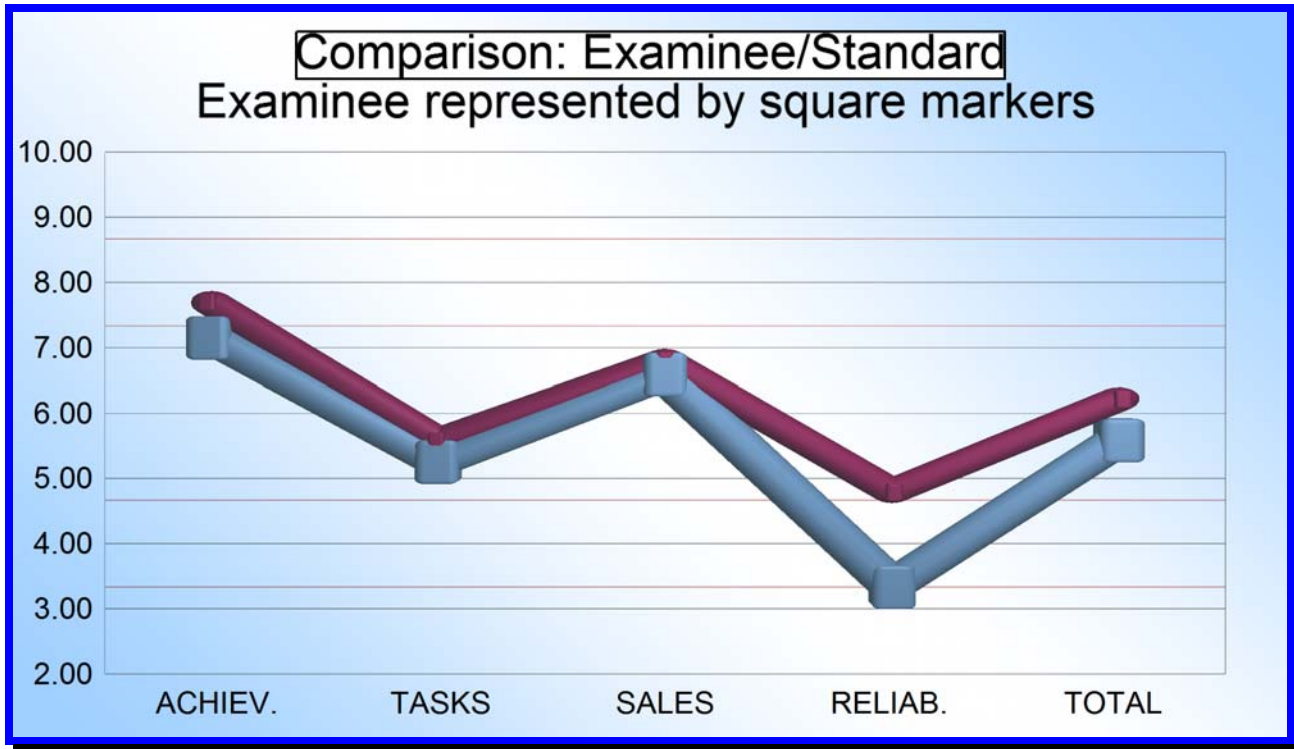
5.60 Marginal -Lower

Turnover Propensity:

Possible Risk

Ability to work on commission:

5.62 Marginal



NOTES: _____ Company: **ABC Industries**

Sales Manager's Report

ABC Industries

Nathaniel Jones
59% Marginal
 Sales Associate

STATUS: Pre-Hire

BEHAVIORAL RANKINGS		Match to "Standard"	
Sales Factors:	6.59 Good	-----	Lower
Achievement Factors:	7.14 Above Average	-----	Lower
Task/Detail Factors:	5.28 Marginal	-----	Lower
Reliability Factors:	3.40 Poor	-----	Lower
Compensating Factors:	5.60 Marginal		
Behavioral Inventory:	5.80		
Advancement Potential: -			
Ability work on Commission: Marginal			
Turnover Propensity: Possible Risk			
Selling Skill Rating:			

CURRENT FOCUS

BEHAVIORAL TRAITS	Standard	Examinee	TRAINING REQUIREMENTS
>> Sales Traits-	6.80	6.59	- Overall review helpful.
Achievement Traits-	7.68	7.14	- Overall training recommended.
Task Propensities-	5.60	5.28	- Overall review helpful.
> Consistency/Reliability-	4.83	3.40	- Focused effort necessary.

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

ANALYST COMMENTS:

- Examinee requires motivation refresher.
- Provide training in information and fact gathering.
- Current focus is somewhat fragmented.

- Examinee's Natural work-style = "Conducting :Persuader " adapting toward "Promoting Persuader "

* NOTE: To be productive the examinee may require additional development & supervision.

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

- Selling skill undetermined. Administer the Sales Strategy Index. Education years: 14

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

Number of jobs in 10 years: 4 Work Years: 10 Supervision: Minimum 11/14

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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.

Development Information:

Reducing Turnover - On-boarding and Orientation training for the new-hire.

A new-hire generally makes a career decision within the first week of employment.

"Is this a good career move, or should I just stay here until something better comes along?"

The answer to that question and the key to reducing turnover lies in how the new-hire and their manager bond during the first week of employment. 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 new-hire 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. Facilitating a new-hire is vastly different than facilitating a long-term employee. The goal here is to create a "Communications Link" so the new-hire 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 for your free On-boarding workbook
Click on the Navigation Link Labeled - SDP workbook
Select and Print out Guide (9)*



DETAILED DEVELOPMENT GUIDE

Prepared for: **Nathaniel Jones**
As: **Sales Associate**

-INSTRUCTIONS:

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

Traits & Propensities	CURRENT FOCUS		TRAINING RECOMMENDATIONS	Stress Levels
ABC Industries	Standard	Examined		
SELLING PROPENSITIES:				
Closing	9.03	8.90		-
> Handling Objections	8.38	8.10	- Minor review helpful.	-
Empathy/Listening Skills	5.00	4.85	- Minor review helpful.	-
Preparation/Thoroughness	5.00	4.50	- Some training recommended.	-
Presentations/Communication	8.48	8.25	- Minor review helpful.	-
Prospecting/rejection	8.08	7.75	- Minor review helpful.	-
> Follow-up/Thoroughness	5.30	5.15		-
Servicing after the sale	5.15	5.25		-
>> Sales Propensity Averages->	6.80	6.59		
ACHIEVEMENT PROPENSITIES:				
Challenge/Competitiveness	7.43	7.05	- Minor review helpful.	-
> Persuasiveness	8.45	8.15	- Minor review helpful.	-
> Results/Goal Orientation	7.05	6.60	- Some training recommended.	-
Self Confidence	7.43	7.00	- Some training recommended.	-
Motivation/Self Directed	8.03	6.90	- Focused effort necessary.	-
Achievement Averages->	7.68	7.14		
TASK PROPENSITIES:				
Client Relations/Sociable	6.63	6.85		-
Information/Fact Gathering	5.70	4.00	- Focused effort necessary.	-
Paper Work/Reports	4.48	5.00		-
Task Propensity Average	5.60	5.28		
> CONSISTENCY/RELIABILITY	4.83	3.40	- Focused effort necessary.	-

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NOTES: _____

Natural/Adapted Behavioral Focus - Sales

Understanding Change:

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

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

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

	Natural or "Basic"	Adapted or "Response" [Trait intensity]	Stress
	Closing	9.00 8.75 <----- Declining	-
>	Handling Objections	8.00 8.25 -----> Increased Focus	-
	Empathy/Listening Skills	4.75 5.00 -----> Increased Focus	-
	Preparation/Thoroughness	4.50 4.50 == Static-	-
	Presentations/Communication	8.25 8.25 == Static-	-
	Prospecting/rejection	7.75 7.75 == Static-	-
>	Follow-up/Thoroughness	5.25 5.00 <----- Declining	-
	Servicing after the sale	5.25 5.25 == Static-	-
>>	Sales Averages->	6.59 6.59 == <i>Static-</i>	
	Challenge/Competitiveness	6.75 7.50 -----> Increased Focus	-
>	Persuasiveness	8.25 8.00 <----- Declining	-
>	Results/Goal Orientation	6.50 6.75 -----> Increased Focus	-
	Self Confidence	7.00 7.00 == Static-	-
	Motivation/Self Directed	7.50 6.00 <----- Declining	-
	Achievement Averages->	7.20 7.05 <----- <i>Declining Achievement Focus</i>	
	Client Relations/Sociable	6.75 7.00 -----> Increased Focus	-
	Information/Fact Gathering	4.00 4.00 == Static-	-
	Paper Work/Reports	5.00 5.00 == Static-	-
	Task Averages->	5.25 5.33 -----> <i>Increased Overall Task Focus</i>	
>	CONSISTENCY/RELIABILITY	3.50 3.25 <----- <i>Declining Reliability/Diligence</i>	-

NOTES: _____



Success Factor Analysis

SALES INTERVIEW QUESTIONS

1. *What aspect of sales do you find most enjoyable?*
2. *What do you like least about being a salesperson?*
3. *Why do you want to work for this company?*
4. *Have you taken any sales training courses recently?*
-Was it a company sponsored course or did you do it on your own?
5. *What do you expect from your sales manager?*
6. *Have you ever been mis-managed? - How did it affect you?*
7. *In your last job, what was your most significant accomplishment?*
8. *Do you use the internet or contact management software?*
9. *Have you won any sales awards? - Explain.*
10. *What are your career goals?*
11. *How do you plan to achieve these goals?*
12. *What have you done recently to invest in your career?*
13. *How do you handle obnoxious prospects or clients?*
14. *Of all the jobs you've had; which did you like least? - Why?*
15. *Why should we hire you?*

Notes:

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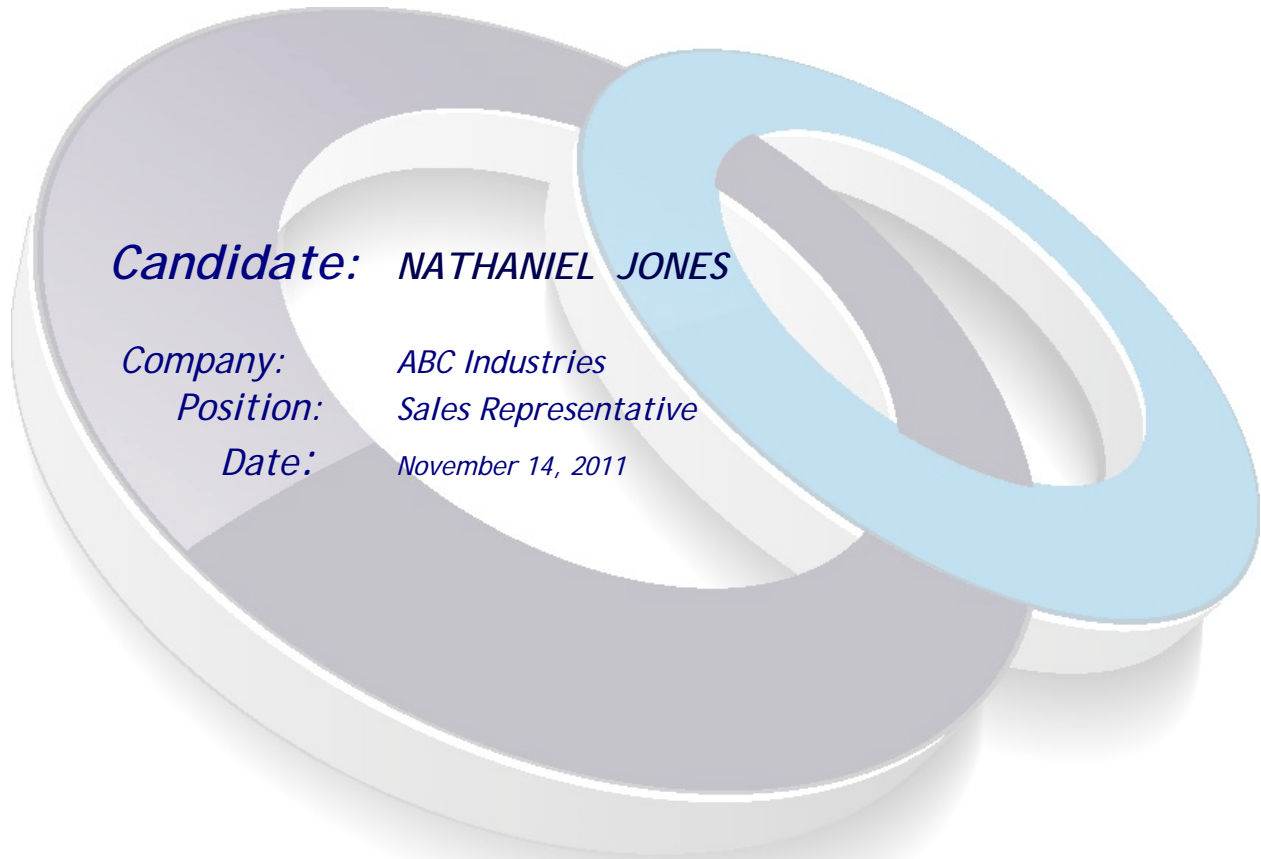
Selling SKILL Evaluation:

If not administered as part of this assessment screening, we recommend the administration of the Sales Strategy Index (SSI) assessment to evaluate this persons ability to sell in a competitive environment and judge their ability to strategize for sales success.



Success Insights tm

Sales Behavioral and Motivational Analysis



Candidate: NATHANIEL JONES

Company: ABC Industries

Position: Sales Representative

Date: November 14, 2011

NEW HIRE DEVELOPMENT GUIDE

SFA - Sales Format NEW-HIRE DEVELOPMENT GUIDE

SAMPLE REPORT

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Success Factor Analysis

Behavioral Hierarchy

An Analysis the examinees 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 for your free On-boarding workbook
Click on the Navigation Link Labeled - *SDP workbook*
Select and Print out Guide (9)



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. COMPETITIVENESS



2. FREQUENT CHANGE



3. FREQUENT INTERACTION WITH OTHERS



4. URGENCY



5. CUSTOMER ORIENTED



6. VERSATILITY



7. ANALYSIS OF DATA



8. ORGANIZED WORKPLACE





VALUE TO THE ORGANIZATION

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

- Thinks big.
- Challenges the status quo.
- Initiates activity.
- Competitive.
- Self-starter.
- Challenge-oriented.
- Motivates others towards goals.
- Innovative.



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

- Democratic supervisor with whom he can associate.
- An innovative and futuristic-oriented environment.
- Forum to express ideas and viewpoint.
- Assignments with a high degree of people contacts.
- Freedom from controls, supervision and details.
- Evaluation based on results, not the process.
- Tasks involving motivated groups and establishing a network of contacts.



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

Nathaniel sets high sales goals for himself. He sees the benefit of joining organizations as a way to meet his sales goals. He usually enjoys the challenge presented by cold calls. They allow him to use what he considers to be one of his real talents--the ability to sell to anyone at anytime! He loves the challenge presented by sales. He sees it as a great opportunity to compete with himself and others. When results are at stake, it brings out Nathaniel's drive for success. Some may see him as a high risk-taker, but this merely reflects his approach to winning. He will take the risks necessary to succeed. Nathaniel wants the authority and responsibility to achieve his sales goals. He may at times tend to overstep his authority if it will help him achieve his goals. He will want to sell new and unusual products or services. Motivated by his many interests, he prefers an ever-changing work environment. He is a self-starter, generally resourceful and readily adaptable to many sales situations. He finds the actual sales process much more rewarding than completing all the paperwork involved.

Nathaniel likes to control the sales presentation. Different styles of buyers will probably prefer that he display his sales flexibility. He usually dominates the sales presentation. He prefers a fast and to-the-point approach, which may be too fast and blunt for some buyers. He may fail to listen to the true objection. In his haste to make a response, the real objection may never be answered. He may not use enough facts to overcome objections; that is, he likes the challenge presented by the objection, and may attempt to answer, whether he has all the facts or not. Nathaniel's body language may



sometimes get him into trouble. He projects a great sense of urgency, which some buyers may interpret as an unwillingness to listen to their needs. He may use confrontation to show his knowledge and expertise. Unless he is calling on an aggressive buyer, this may hinder the sale.

Nathaniel often promises more service than he can deliver, especially if he must be the person to deliver. He usually has too many activities going on to fulfill all he promises. He will be direct and positive with his closes. He can be persistent and friendly at the same time. Nathaniel's natural closing style works extremely well with fast-acting buyers. These buyers appreciate a salesperson who uses the direct approach. He usually closes soon and often. He will close many sales the competition has sold but failed to close. Nathaniel usually has his favorite close, and he might, therefore, resist using all the closes he knows. He can close so hard that he causes the buyer to think of objections, which may be excuses rather than real objections.



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

Do:

- Talk about him, his goals and opinions he finds stimulating.
- Use enough time to be stimulating, fun-loving, fast-moving.
- Provide a warm and friendly environment.
- Present the facts logically; plan your presentation efficiently.
- Provide questions, alternatives and choices for making his own decisions.
- Take issue with facts, not the person, if you disagree.
- Ask specific (preferably "what?") questions.
- Come prepared with all requirements, objectives and support material in a well-organized "package."
- Stick to business--let him decide if he wants to talk socially.
- Offer special, immediate and extra incentives for his willingness to take risks.
- Read the body language for approval or disapproval.
- Support and maintain an environment where he can be efficient.



DON'TS ON COMMUNICATING

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

- Try to build personal relationships.
- Talk down to him.
- "Dream" with him or you'll lose time.
- Be curt, cold or tight-lipped.
- Reinforce agreement with "I'm with you."
- Try to convince by "personal" means.
- Be dogmatic.
- Ramble on, or waste his time.
- Be redundant.
- Drive on to facts, figures, alternatives or abstractions.
- Let disagreement reflect on him personally.
- Waste time trying to be impersonal, judgmental, or too task-oriented.
- Forget or lose things; be disorganized or messy; confuse or distract his mind from business.



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

"See Yourself As Others See You"

SELF-PERCEPTION

Nathaniel usually sees himself as being:

Pioneering
Competitive
Positive

Assertive
Confident
Winner

OTHERS' PERCEPTION

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

Demanding
Egotistical

Nervy
Aggressive

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

Abrasive
Arbitrary

Controlling
Opinionated



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

Nathaniel wants:

- Outside activities so there is never a dull moment.
- Changing environments in which to work/play.
- Participation in meetings on future planning.
- A wide scope of activities.
- Freedom from routine work.
- A manager who practices participative management.
- A friendly work environment.
- A sales manager who presents the big picture.
- Freedom from control and detail.
- A support system to do the detail work.
- Rewards to support his dreams.
- Support troops to follow through with his part or detail work.
- Group activities outside the job.



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

Nathaniel needs:

- More logical presentations--less emotional.
- More control of body language.
- To focus conversations on work activities--less socializing.
- To handle routine paperwork only once.
- To be confronted when in disagreement or when he breaks the rules.
- Help on controlling time and setting priorities.
- To maintain focus on results and not sacrifice productivity just to make everyone happy.
- A program for pacing work and relaxing.
- To adjust his intensity to match the situation.
- To understand his role on the team--either a team player or the leader.
- To negotiate commitment face-to-face.



NATURAL AND ADAPTED SELLING STYLE

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

Natural	PROBLEMS - CHALLENGES	Adapted
<p>Nathaniel is ambitious in his approach to selling, displaying a strong will and has a need to win against all obstacles. He has a tendency to confront prospects and desire to control the sales situation. He needs a territory and products that will constantly challenge him.</p>	<p>Nathaniel sees the need to be competitive, results-oriented and a little innovative in his response to the sales environment. He has a tendency to evaluate the risk and may not push a potential buyer hard if they demonstrate some resistance.</p>	

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



Natural	PACE - CONSISTENCY	Adapted
Nathaniel is comfortable in a sales environment that allows him mobility and movement. He feels comfortable with several proposals in the mill at the same time. He can move from one prospect to another with ease.	Nathaniel sees the need to deal with a wide scope of sales activities and prospects. He feels comfortable shuffling schedules and filling every available time slot with activities.	

Natural	PROCEDURES - CONSTRAINTS	Adapted
Nathaniel is striving to be independent and self-directed. He is most comfortable in a sales environment where rules and procedures can be interpreted to meet the needs of his customer in certain situations.	The difference between Nathaniel's basic and adapted sales style is not significant and he sees no need to change on this factor.	



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

- Using persuasive skills.
- Reacting quickly to changes in the sales process or product line.
- Handling a variety of products or services.
- Generating enthusiasm in others.
- Using great social strengths in approaching new prospects.
- Using an informal sales presentation.
- Using sales aids in presentation, when he remembers to take them with him.
- Alert, active attention to customers or clients.
- Meeting customers either formally or informally.
- Verbally stressing the benefits of his product or service.
- Impulsive and eager to keep the sales presentation moving.
- Exhibiting excitement about his service or product.
- Adaptable in meeting the needs of clients or customers.



AREAS FOR IMPROVEMENT

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

Nathaniel has a tendency to:

- Represent himself with more authority than he may have.
- Take objections lightly.
- Not answer objections to buyer's satisfaction.
- Not have presentation in a logical order.
- Blame, deny and defend when confronted with poor sales results.
- Resist participation as part of the team, unless seen as a leader.
- Sell what he wants to sell rather than listen to the buyer's needs.
- Be a situational listener--hears only what he wants to hear.
- Dominate a sales presentation.

