

A-L

# Success Insights <sup>tm</sup>

Examinee: - **JANE DOE**  
Company: - ABC Industries  
Job Title: - Customer Service Manager  
Date: - March 2, 2006

[Analyst-Link](#) [Sample Report](#)

## **INSTRUCTIONS:**

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

## **This report comments on multiple behavioral dimensions including:**

- , Reaction to problems and challenges.
- , Ability to communicate and influence.
- , Adaptability to the pace of the work environment.
- , Response to rules and procedures.
- , Workstyle Profile (graph)
- , Behavioral Hierarchy

# SUCCESS INSIGHTS

## **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.*

## **LINKED PERFORMANCE CATALYSTS**

- VALUE TO THE ORGANIZATION**
- IDEAL (*Work*) ENVIRONMENT**

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



## VALUE TO THE ORGANIZATION

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

---

- Challenge-oriented.
- Self-starter.
- Creative in her approach to solving problems.
- Tenacious.
- Thinks big.
- Ability to change gears fast and often.
- Accomplishes goals through people.
- Forward-looking and future-oriented.



## IDEAL ENVIRONMENT

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

---

- Nonroutine work with challenge and opportunity.
- Evaluation based on results, not the process.
- Work for a manager who makes quick decisions.
- Forum to express ideas and viewpoints.
- An innovative and futuristic-oriented environment.
- New products and new ideas to work on.
- Activities, and more activities.
- Freedom from long, detailed reports.



## GENERAL CHARACTERISTICS

Based on Jane'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 Jane's natural behavior.

---

Jane can be aggressive and direct, but still be considerate of people. Other people realize that directness is one of her great strengths. She is driven toward goals completion and wants to be in a position to set policy that will allow her to meet those goals. She is a self-starter who likes new projects and is most comfortable when involved with a wide scope of activities. She embraces visions not always seen by others. Jane's creative mind allows her to see the "big picture." Jane enjoys authority, independence and the freedom that goes with her aggressive approach to problem solving. Most people see her as a high risk-taker. Her view is, "nothing ventured, nothing gained." She prefers an environment with variety and change. She is at her best when many projects are underway at once. She likes to be forceful and direct when dealing with others. Her desire for results is readily apparent to the people with whom she works. Jane has high ego strengths and may be viewed by some as egotistical. She wants to be seen as an individual who is totally keyed to results. She wants to get things done in a manner that is consistent with her perception of the "right way" of doing things.

Jane finds it easy to share her opinions on solving work-related problems. Sometimes she becomes emotionally involved in the decision-making process. She prefers authority equal to her responsibility. She is decisive and prefers to work for a decisive manager.



## GENERAL CHARACTERISTICS

---

She can experience stress if her manager does not possess similar traits. When faced with a tough decision, she will try to sell you on her ideas. She should realize that at times she needs to think a project through, beginning to end, before starting the project. She has the unique ability of tackling tough problems and following them through to a satisfactory conclusion. She will work long hours until a tough problem is solved. After it is solved, Jane may become bored with any routine work that follows.

Jane should exhibit more patience and ask questions to make sure that others have understood what she has said. She tends to be intolerant of people who seem ambiguous or think too slowly. She may lose interest in what others are saying if they ramble or don't speak to the point. Her active mind is already moving ahead. Her creative and active mind may hinder her ability to communicate to others effectively. She may present the information in a form that cannot be easily understood by some people. Jane challenges people who volunteer their opinions. She may lack the patience to listen and communicate with slower acting people. She may sometimes mask her feelings in friendly terms. If pressured, Jane's true feelings may emerge. She tends to influence people by being direct, friendly and results-oriented.



## 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 Jane. 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 Jane most frequently.

---

Do:

- Provide questions, alternatives and choices for making her own decisions.
- Understand her sporadic listening skills.
- Use her jargon.
- Be clear, specific, brief and to the point.
- Read the body language--look for impatience or disapproval.
- Provide facts and figures about probability of success, or effectiveness of options.
- Provide systems to follow.
- Put projects in writing, with deadlines.
- Support the results, not the person, if you agree.
- Expect acceptance without a lot of questions.
- Motivate and persuade by referring to objectives and results.
- Be open, honest and informal.
- Give strokes for her involvement.



## DON'TS ON COMMUNICATING

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

- Come with a ready-made decision, or make it for her.
- Use paternalistic approach.
- Dictate to her.
- Be put off by her "cockiness."
- Let disagreement reflect on her personally.
- Ramble on, or waste her time.
- Forget to follow-up.
- Ask rhetorical questions, or useless ones.
- Try to convince by "personal" means.
- Reinforce agreement with "I'm with you."
- Let her change the topic until you are finished.
- Try to build personal relationships.
- Assume she heard what you said.



## COMMUNICATION TIPS

This section provides suggestions on methods which will improve Jane'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, Jane 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>



## PERCEPTIONS

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

### "See Yourself As Others See You"

#### SELF-PERCEPTION

Jane usually sees herself as being:

Pioneering  
Competitive  
Positive

Assertive  
Confident  
Winner

#### OTHERS' PERCEPTION

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

Demanding  
Egotistical

Nervy  
Aggressive

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

Abrasive  
Arbitrary

Controlling  
Opinionated



## KEYS TO MANAGING

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

---

Jane needs:

- Appreciation of slower-moving people.
- Budgets to help prioritize her purchases.
- To pace herself.
- Consistency.
- An awareness of the parameters or rules in writing.
- To display empathy for people who approach life differently than she does.
- To understand her role on the team--either a team player or the leader.
- To negotiate commitment face-to-face.
- Vacations or periods of reduced activity level.
- A program for pacing work and relaxing.
- To be confronted when in disagreement, or when she breaks the rules.
- Systems to follow.



## KEYS TO MOTIVATING

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

---

Jane wants:

- Freedom from routine work.
- Power and authority to take the risks to achieve results.
- Changing environments in which to work/play.
- Outside activities so there is never a dull moment.
- More time in the day.
- New challenges and problems to solve.
- To be seen as a leader.
- A wide scope of activities.
- Support system to help with details and follow through.
- Prestige, position and titles so she can control the destiny of others.
- Travel or changing work stations.



## NATURAL AND ADAPTED STYLE

Jane'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>Jane tends to deal with problems and challenges in a demanding, driving and self-willed manner. She is individualistic in her approach and actively seeks goals. Jane will attack problems and likes a position with authority and work that will constantly challenge her to perform up to her ability.</p>	<p>Jane's response to the environment is to be strong-willed and ambitious in her problem-solving approach. She seeks to win against all obstacles.</p>	

Natural	PEOPLE - CONTACTS	Adapted
<p>Jane is enthusiastic about her ability to influence others. She prefers an environment in which she has the opportunity to deal with different types of individuals. Jane is trusting and also wants to be trusted.</p>	<p>Jane 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>Jane is comfortable in an environment that is constantly changing. She seeks a wide scope of tasks and duties. Even when the environment is frantic, she can still maintain a sense of equilibrium. She is capable of taking inconsistency to a new height and to initiate change at the drop of the hat.</p>	<p>Jane sees her natural activity style to be just what the environment needs. What you see is what you get for activity level and consistency. Sometimes she would like the world to slow down.</p>	

Natural	PROCEDURES - CONSTRAINTS	Adapted
<p>Jane 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>Jane sees the environment with few constraints. She feels the necessity to rebel at too many constraints and may even flaunt this independence.</p>	



## ADAPTED STYLE

Jane 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.

---

- Meeting deadlines.
- Skillful use of vocabulary for persuasive situations.
- Persistence in job completion.
- Anticipating and solving problems.
- Handling a variety of activities.
- Acting without precedent, and able to respond to change in daily work.
- Moving quickly from one activity to another.
- A good support team to handle paperwork.
- Working without close supervision.
- Exhibiting an active and creative sense of humor.
- Questioning the status quo, and seeking more effective ways of accomplishment.



## AREAS FOR IMPROVEMENT

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

---

Jane has a tendency to:

- Be disruptive because of her innate restlessness and disdain for sameness.
- Make "off the cuff" remarks that are often seen as personal prods.
- Be impulsive and seek change for change's sake. May change priorities daily.
- Be a one-way communicator--doesn't listen to the total story before introducing her opinion.
- Be inconsistent because of many stops, starts and ever-changing direction.
- Resist participation as part of the team, unless seen as a leader.
- Fail to complete what she starts because of adding more and more projects.
- Have no concept of the problems that slower-moving people may have with her style.

# Success Insights Development Program

## **INSIGHTS WHEEL - WORK-STYLE GRAPH:**

The Success Insights Wheel Graph shows your natural work-style and your adapted style. For more information or to better understand your work-style go to: **www.analyst-link.net**

Enter the following user name: **Understanding**

Enter the following password in lower case type: **workstyles**

## **BEHAVIORAL HIERARCHY:**

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

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

## **SUCCESS DISCOVERY PROCESS:**

**After reviewing this report it is important that you use the information contained within it to effect performance improvement.**

To assist in this effort -

Go to: **www.analyst-link.net**

Enter the following user name: **Success**

Enter the following password in lower case type: **guide**

### **Select and Print out Guide (3)**

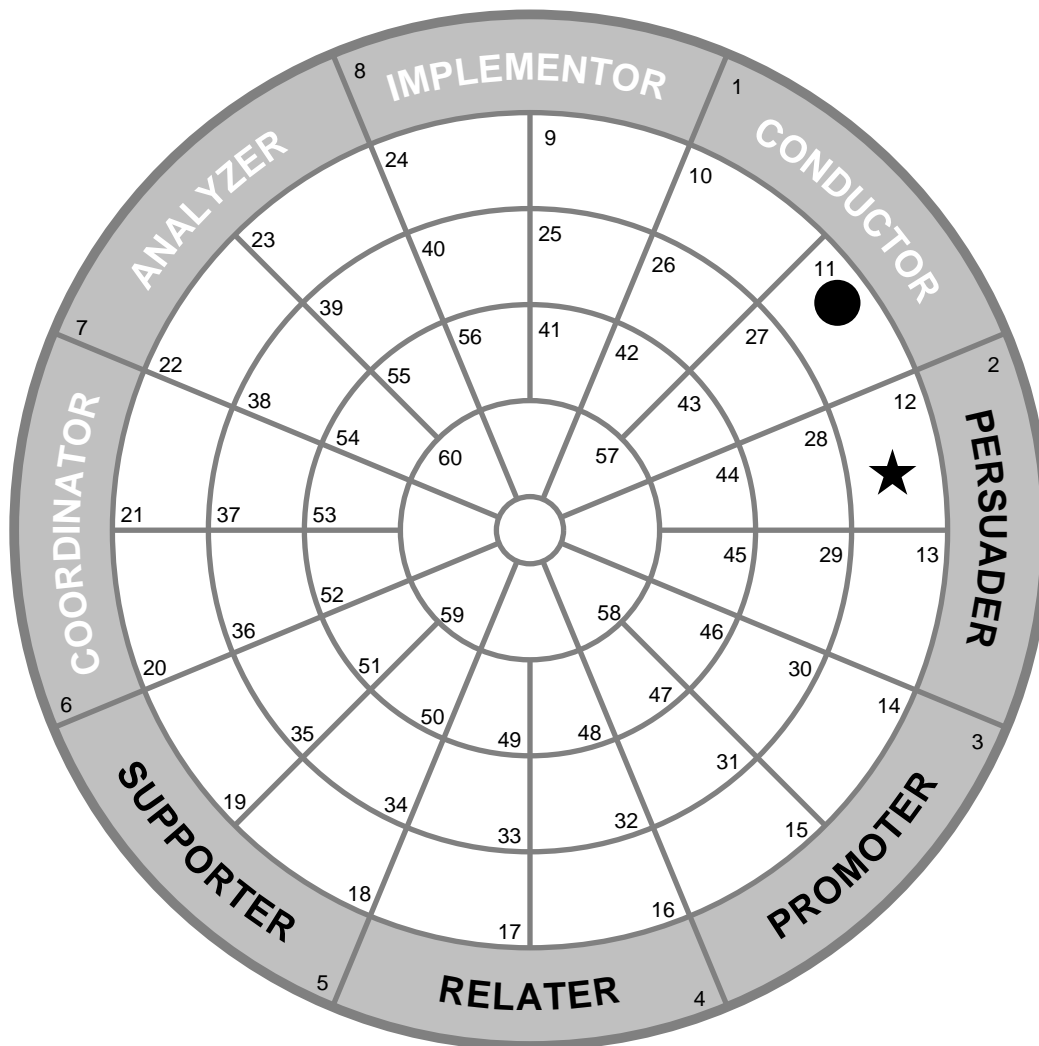
Complete the worksheets and create an Action Plan.



# THE SUCCESS INSIGHTS® WHEEL

Jane Doe

2-27-2006



Adapted: ★ (12) CONDUCTING PERSUADER  
Natural: ● (11) PERSUADING CONDUCTOR

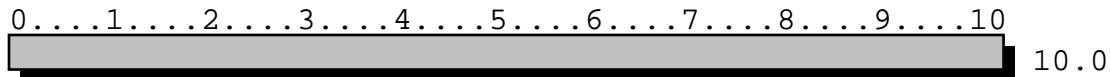
Norm 2003



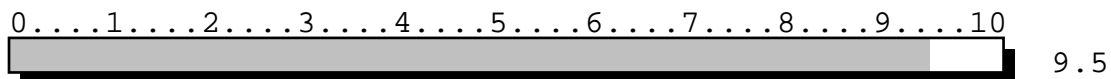
# BEHAVIORAL HIERARCHY

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.

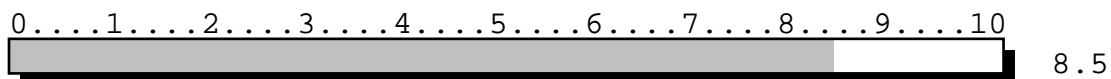
## 1. COMPETITIVENESS



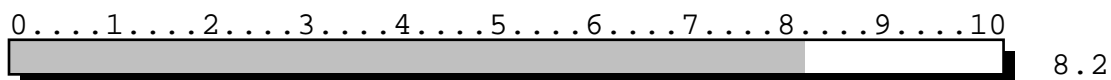
## 2. URGENCY



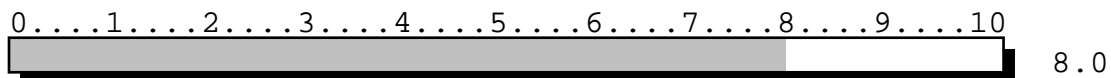
## 3. VERSATILITY



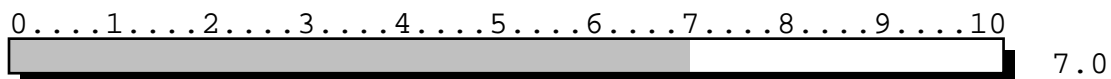
## 4. FREQUENT CHANGE



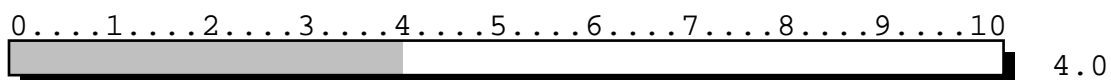
## 5. FREQUENT INTERACTION WITH OTHERS



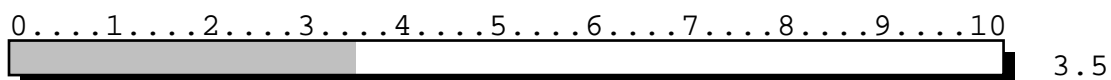
## 6. CUSTOMER ORIENTED



## 7. ANALYSIS OF DATA



## 8. ORGANIZED WORKPLACE



# Success Insights Action Plan

**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)