

MANAGING FOR SUCCESS®

Sales Version

*"He who knows others is learned.
He who knows himself is wise."
-Lao Tse*

John Doe

12-4-2003

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INTRODUCTION

Behavioral research suggests that the most effective people are those who understand themselves, both their strengths and weaknesses, so they can develop strategies to meet the demands of their environment.

A person's behavior is a necessary and integral part of who they are. In other words, much of our behavior comes from "nature" (inherent), and much comes from "nurture" (our upbringing). It is the universal language of "how we act," or our observable human behavior.

In this report we are measuring four dimensions of normal behavior. They are:

- how you respond to problems and challenges.
- how you influence others to your point of view.
- how you respond to the pace of the environment.
- how you respond to rules and procedures set by others.

This report analyzes behavioral style; that is, a person's manner of doing things. Is the report 100% true? Yes, no and maybe. We are only measuring behavior. We only report statements from areas of behavior in which tendencies are shown. To improve accuracy, feel free to make notes or edit the report regarding any statement from the report that may or may not apply, but only after checking with friends or colleagues to see if they agree.

*"All people exhibit all four behavioral factors in varying degrees of intensity."
—W.M. Marston*

SALES CHARACTERISTICS

Based on John'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.

John becomes highly excited about what influences him. He usually displays this emotion when he is attempting to influence people. He prefers to sell new, innovative products or services. In fact, he often uses creative ways to sell his products or services. He sets high sales goals for himself and others. Being optimistic, he may set them too high. However, if he develops a plan and follows that plan, he usually will deliver the results. He becomes highly excited about selling something that he really likes. John maintains a high trust level; that is, he trusts that people will make good on their promises. Socially and verbally aggressive, he loves to meet strangers and begin conversations. This is a great attribute when new territory is opened, or new accounts are dictated by business conditions. He can become emotional about the product or service that he provides to his clients or customers.

John may not always listen to what his prospects are saying. His desire to verbalize and control the presentation often may hinder his ability to listen. He may also be guilty of interrupting the prospect to get his point across. He should learn to follow all objections with a question. This will allow him time to prepare his answer and help clarify the prospect's actual objection. He may not answer objections completely. He often treats them lightly and may "tap dance" around the objections or use sales puffery to answer them. If he gets into one of his "oversell" modes, he may cause the objections to be raised. However, he will welcome the objections and answer them to the best of his ability. John may proceed too fast with his presentation for some buyers. He gets

SALES CHARACTERISTICS

carried away with his emotions and tends to let the emotion control the pace of the presentation. His presentation may not be logical enough for some buyers. He has good intentions, but may become excited and jump around in the presentation. This may cause buyers to ask questions or raise objections to support the need for a logical presentation.

John has a good sense of urgency to get things done quickly. Sometimes this will not allow him the patience needed to service some of his accounts. Sometimes he tries too hard to accommodate the buyer with service. He will resent his effort if the account doesn't live up to its potential. He will promise more service than he can deliver, especially if he must provide the service himself. He needs the help of a support staff to provide the follow-up service so he can focus on new opportunities. He probably has several favorite closes. He needs to evaluate the way he is using them and if they are appropriate to the sales situation. John would rather make a social visit instead of a service visit. The social visit meets his need to be friendly and outgoing, while the service visit requires special effort if customers don't buy more products or services. He can be guilty of overservicing the accounts he feels are personal friends. To him, friendship is important and he may overlook certain requests to maintain the friendship.

VALUE TO THE ORGANIZATION

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

- Motivates others towards goals.
- Negotiates conflicts.
- Thinks big.
- Optimistic and enthusiastic.
- Innovative.
- Builds confidence in others.
- Positive sense of humor.
- Usually makes decisions with the bottom line in mind.

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 John. 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 John most frequently.

Do:

- Provide testimonials from people he sees as important.
- Talk about him, his goals and opinions he finds stimulating.
- Not deal with details, put them in writing, pin him to modes of action.
- Support the results, not the person, if you agree.
- Provide a warm and friendly environment.
- Provide ideas for implementing action.
- Stick to business--let him decide if he wants to talk socially.
- Ask specific (preferably "what?") questions.
- Plan interaction that supports his dreams and intentions.
- Support and maintain an environment where he can be efficient.
- Provide questions, alternatives and choices for making his own decisions.
- Offer special, immediate and extra incentives for his willingness to take risks.
- Read the body language--look for impatience or disapproval.

DON'TS ON COMMUNICATING

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

- Drive on to facts, figures, alternatives or abstractions.
- Leave decisions hanging in the air.
- Try to convince by "personal" means.
- Be dogmatic.
- "Dream" with him or you'll lose time.
- Ramble on, or waste his time.
- Come with a ready-made decision, and don't make it for him.
- Legislate or muffle--don't overcontrol the conversation.
- Direct or order.
- Try to build personal relationships.
- Talk down to him.
- Kid around too much, or "stick to the agenda" too much.
- Be redundant.

SELLING TIPS

This section provides suggestions on methods which will improve John's communications when selling to different styles. The tips include a brief description of typical people in which he may interact. By adapting to the communication style desired by other people, John will become more effective in his communications with them. He may have to practice some flexibility in varying his communication style with others who may be different from himself. This flexibility and the ability to interpret the needs of others is the mark of a superior salesperson.

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

- Be clear, specific, brief and to the point.
- Stick to business. Give an effective presentation.
- Come prepared with support material in a well-organized "package."

Factors that will create tension:

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

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

- Provide a warm and friendly environment.
- Don't deal with a lot of details, unless they want them.
- Provide testimonials from people they see as important.

Factors that will create tension:

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

SELLING TIPS

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

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

Factors that will create tension:

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

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

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

Factors that will create tension:

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

IDEAL ENVIRONMENT

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

- Nonroutine work with challenge and opportunity.
- Work tasks that change from time to time.
- Democratic supervisor with whom he can associate.
- Evaluation based on results, not the process.
- Assignments with a high degree of people contacts.
- Forum to express ideas and viewpoint.
- Freedom from controls, supervision and details.
- Freedom of movement.

PERCEPTIONS

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

"See Yourself As Others See You"

SELF-PERCEPTION

John usually sees himself as being:

Enthusiastic
Charming
Persuasive

Outgoing
Inspiring
Optimistic

OTHERS' PERCEPTION

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

Self-Promoting
Overly Optimistic

Glib
Unrealistic

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

Overly Confident
Poor Listener

Talkative
Self-Promoter

DESCRIPTORS

Based on John's responses, the report has marked those words that describe his personal behavior. They describe how he solves problems and meets challenges, influences people, responds to the pace of the environment and how he responds to rules and procedures set by others.

Dominance	Influencing	Steadiness	Compliance
Demanding	Effusive	Phlegmatic	Evasive
Egocentric	Inspiring	Relaxed	Worrisome
Driving	Magnetic	Resistant to Change	Careful
Ambitious	Political	Nondemonstrative	Dependent
Pioneering	Enthusiastic	Passive	Cautious
Strong-Willed	Demonstrative	Patient	Conventional
Forceful	Persuasive	Possessive	Exacting
Determined	Warm	Predictable	Neat
Aggressive	Convincing	Consistent	Systematic
Competitive	Polished	Deliberate	Diplomatic
Decisive	Poised	Steady	Accurate
Venturesome	Optimistic	Stable	Tactful
Inquisitive	Trusting		Open-Minded
Responsible	Sociable		Balanced Judgment
Conservative	Reflective	Mobile	Firm
Calculating	Factual	Active	Independent
Cooperative	Calculating	Restless	Self-Willed
Hesitant	Skeptical	Alert	Stubborn
Low-Keyed	Logical	Variety-Oriented	Obstinate
Unsure	Undemonstrative	Demonstrative	
Undemanding	Suspicious	Impatient	Opinionated
Cautious	Matter-of-Fact	Pressure-Oriented	Unsystematic
Mild	Incisive	Eager	Self-Righteous
Agreeable	Pessimistic	Flexible	Uninhibited
Modest	Moody	Impulsive	Arbitrary
Peaceful	Critical	Impetuous	Unbending
Unobtrusive		Hypertense	Careless with Details

NATURAL AND ADAPTED SELLING STYLE

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

PROBLEMS - CHALLENGES (Natural)

John 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.

PROBLEMS - CHALLENGES (Adapted)

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

PEOPLE - CONTACTS (Natural)

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

PEOPLE - CONTACTS (Adapted)

John projects a positive and enthusiastic attitude toward influencing others. He sees the need to be trusting and wants to be trusted.

NATURAL AND ADAPTED SELLING STYLE

PACE - CONSISTENCY (Natural)

John wants a sales environment that is intense and demanding. He feels a great sense of urgency to close his prospects quickly. He feels comfortable selling new products that meet his prospect's needs.

PACE - CONSISTENCY (Adapted)

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

PROCEDURES - CONSTRAINTS (Natural)

John is independent by nature and his sales style displays his desire to sell the results he can deliver, as opposed to providing all the details to support his position. If he feels that rules and procedures are too restrictive he will attempt to change them in an active manner.

PROCEDURES - CONSTRAINTS (Adapted)

The difference between John's basic and adapted sales style is not significant and he sees no need to change on this factor.

ADAPTED STYLE

John 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.

- Anticipating and using creative ways to assist clients in problem solving.
- A resourceful, eager self-starter.
- Seeking challenges presented by competition.
- Uninhibited in making a creative sales presentation.
- Setting his own agenda for results.
- Authority to carry out responsibility.
- Positive response to a client's objections.
- Exhibiting confidence in approaching customers.
- Sharing his personal opinion with a client or customer.
- Making a presentation in his own particular style.
- Unafraid to overstep authority when necessary to make a sale.
- Challenging the status-quo.

KEYS TO MOTIVATING

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

John wants:

- Prestige, position and titles so he can control the destiny of others.
- The chance to have fun (play hard--work hard).
- Unusual, new or difficult products to sell.
- Sales meetings that allow him to ventilate his emotions.
- New challenges and problems to solve.
- Power and authority to take the risks to achieve sales results.
- Exposure to those who appreciate his sales results.
- No close supervision.
- Opportunity to verbalize his ideas and demonstrate his skills.
- Control of his own destiny.
- Exciting place to work.
- To be seen as a leader.

KEYS TO MANAGING

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

John needs:

- Better organization of record keeping.
- To mask emotions when appropriate.
- Participatory management.
- Objectivity when dealing with customers because of his high trust level.
- To know results expected and to be evaluated on the results.
- To understand his role on the team--either a team player or the leader.
- To be informed of things which affect him.
- To handle routine paperwork only once.
- More control of body language.
- People to work and associate with.
- An awareness of the parameters or rules in writing.
- Objectivity in managing a sales territory.

AREAS FOR IMPROVEMENT

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

John has a tendency to:

- Sell new accounts rather than service present ones.
- Give away products or services to make client happy.
- Be so enthusiastic that he can be seen as superficial.
- Not have all the necessary brochures and sales aids.
- Not answer objections completely, or tap dances around the objections.
- Be a situational listener.
- Be unrealistic in appraising a client's credit.
- Make promises he can't keep.

ACTION PLAN

Name: John Doe

The following are examples of areas in which John may want to improve. Circle 1 to 3 areas and develop action plan(s) to bring about the desired results. Look over the report for possible areas that need improvement.

Customer Service
Prospecting
Preparation
Presentation
Handling Objections

Closing
Product Knowledge
Personal Goals
Other

Area:

- 1.
- 2.
- 3.

Area:

- 1.
- 2.
- 3.

Area:

- 1.
- 2.
- 3.

Date to Begin: _____ Date to Review: _____

BEHAVIORAL FACTOR INDICATOR™

Sales Version

John Doe

12-4-2003



INTRODUCTION

The principal purpose of this report is to help you win, to achieve a greater success in life and work. Winners, throughout history, have had one thing in common -- they know themselves. By reading your report you will gain insights about yourself. With these insights you can develop strategies to win in any environment.

Classifying selling behavior is not an easy undertaking, largely because there are so many variables on which classification could be based. The classifications in this report are purely behavioral. Behavioral measurement can be classified as HOW a person will do a job. To discover WHY, additional information must be collected.

The Natural graph represents your natural behavior - the behavior you bring to the job. The Adapted graph measures your response to the environment - the behavior you think is necessary to succeed at a job. If your Adapted graph is significantly different from your Natural graph, you are under pressure to change or "mask" your behavior.

Read and compare your graphs. Look at each factor and the importance of that factor to the successful performance of your job. Your Adapted graph will identify the factors you see as important and shows you where you are focusing your energy.

Knowledge of your behavior will allow you to develop strategies to win in any environment you choose.

GENERAL FACTOR ANALYSIS

John Doe

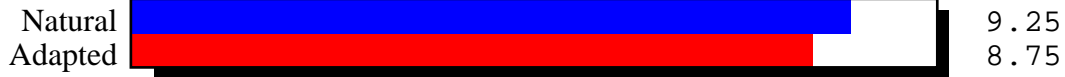
PREPARATION

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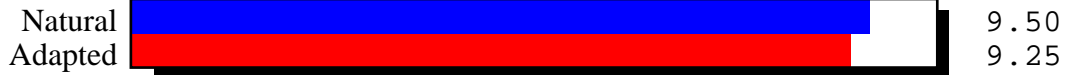
PRESENTATION

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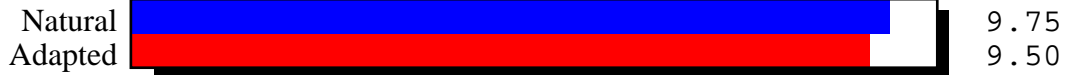
HANDLING OBJECTIONS

0...1...2...3...4...5...6...7...8...9...10



CLOSING

0...1...2...3...4...5...6...7...8...9...10



SERVICING

0...1...2...3...4...5...6...7...8...9...10



SPECIFIC FACTOR ANALYSIS

John Doe

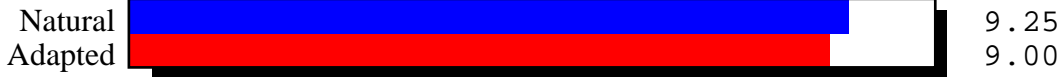
CHALLENGE ORIENTED

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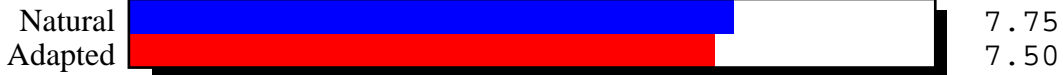
SELF-STARTER

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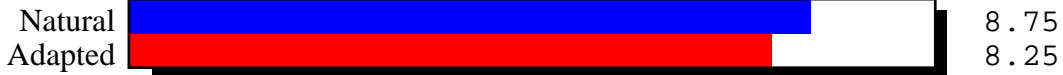
RESULTS ORIENTED

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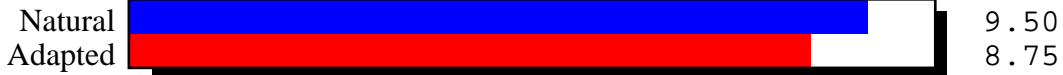
PROSPECTING

0...1...2...3...4...5...6...7...8...9...10



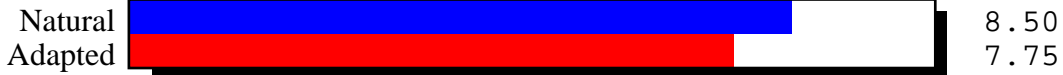
PERSUASION

0...1...2...3...4...5...6...7...8...9...10



SELF-CONFIDENCE

0...1...2...3...4...5...6...7...8...9...10



SPECIFIC FACTOR ANALYSIS

John Doe

CONSISTENCY

0...1...2...3...4...5...6...7...8...9...10



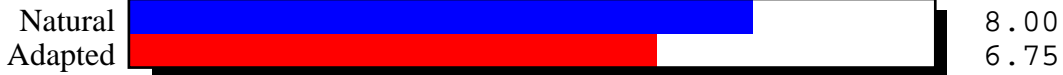
NATURAL LISTENING SKILLS

0...1...2...3...4...5...6...7...8...9...10



CUSTOMER RELATIONS

0...1...2...3...4...5...6...7...8...9...10



PRODUCT INFORMATION (FACTS)

0...1...2...3...4...5...6...7...8...9...10



FOLLOW-UP AND FOLLOW-THROUGH

0...1...2...3...4...5...6...7...8...9...10



PAPER WORK

0...1...2...3...4...5...6...7...8...9...10

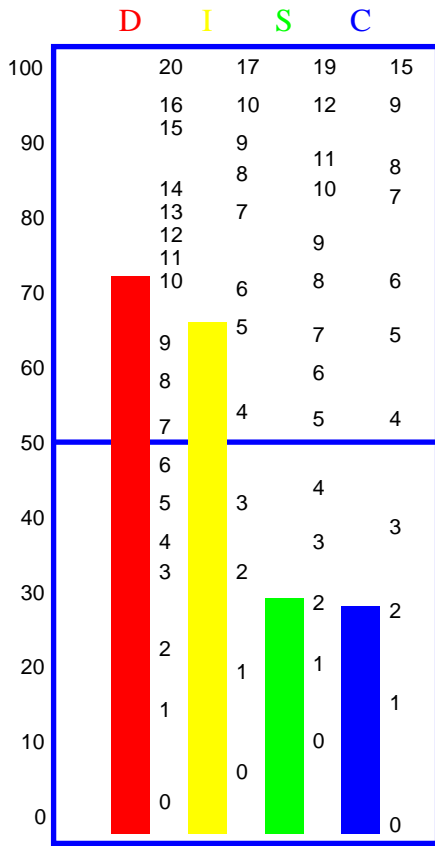


STYLE ANALYSIS™ GRAPHS

John Doe

12-4-2003

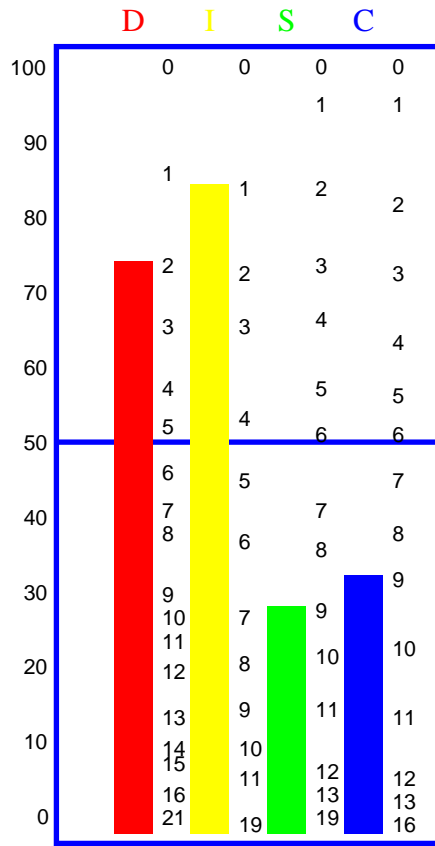
MOST
Graph I
Adapted Style



Score
%

10	5	2	2
72	66	30	29

LEAST
Graph II
Natural Style



2	1	9	9
74	84	29	33

THE SUCCESS INSIGHTS® WHEEL

The Success Insights® Wheel is a powerful tool popularized in Europe. In addition to the text you have received about your behavioral style, the Wheel adds a visual representation that allows you to:

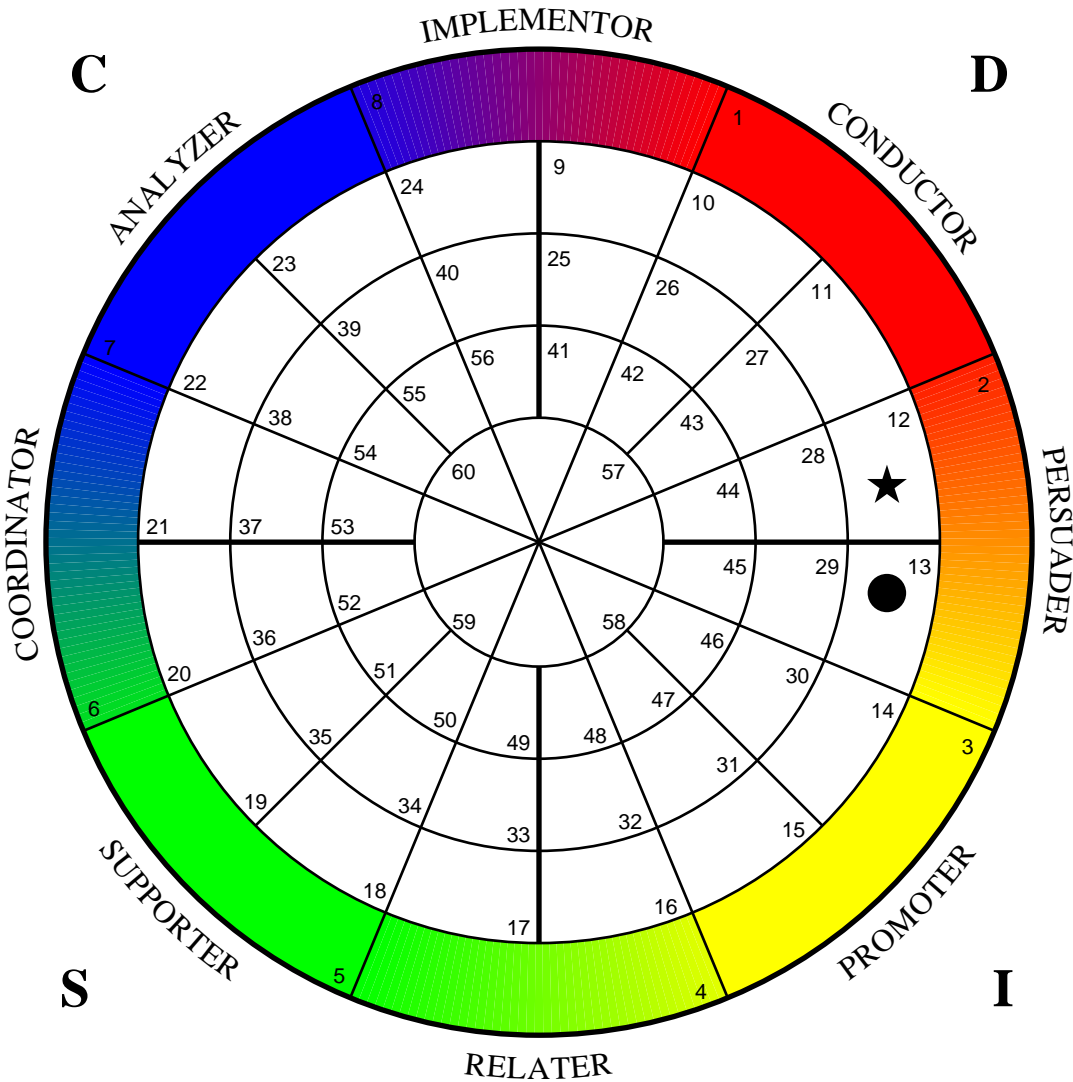
- View your natural behavioral style (circle).
- View your adapted behavioral style (star).
- Note the degree you are adapting your behavior.
- If you filled out the Work Environment Analysis, view the relationship of your behavior to your job.

Notice on the next page that your Natural style (circle) and your Adapted style (star) are plotted on the Wheel. If they are plotted in different boxes, then you are adapting your behavior. The further the two plotting points are from each other, the more you are adapting your behavior.

If you are part of a group or team who also took the behavioral assessment, it would be advantageous to get together, using each person's Wheel, and make a master Wheel that contains each person's Natural and Adapted style. This allows you to quickly see where conflict can occur. You will also be able to identify where communication, understanding and appreciation can be increased.

THE SUCCESS INSIGHTS® WHEEL

John Doe
12-4-2003



Adapted: ★ (12) CONDUCTING PERSUADER

Natural: ● (13) PROMOTING PERSUADER