

MANAGING FOR SUCCESS®

Sales Version

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

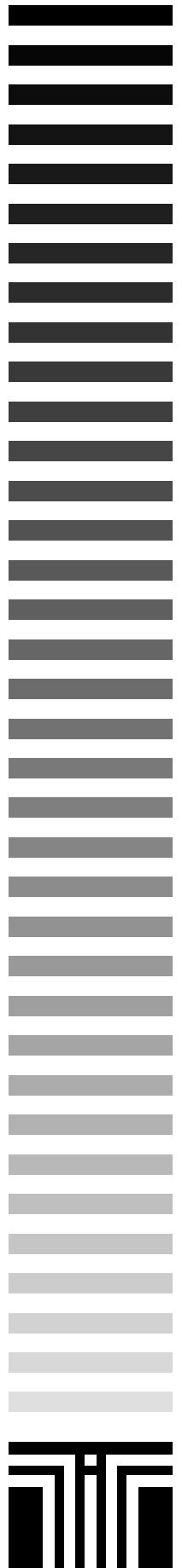
Mary Smith

Sales

Client Company, Inc.

11-22-2004

Performance Matters ReDefined
1-800-452-3896
www.pmredefined.com



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

Mary tends to build close relationships with her clients or customers. One of Mary's sales strengths is her ability to listen to what the buyer is saying. She can display the patience required to allow the buyer the opportunity to explain her needs. She hesitates to sell new products until they have been proven by her own standards. She has standards by which she evaluates new products for her own use and applies these same standards in her sales approach. She enjoys selling in a nonthreatening environment where she can service what she sells. Loyalty is important to her, and she willingly pays the price to develop a loyal relationship with her customers. Once Mary has begun an established work pattern, she follows it with great patience. She operates well as a member of a sales team and will coordinate her sales efforts with others. Many see her as a good neighbor and she is willing to help those she considers to be friends. She prefers to sell in a territory where she knows the customers. This allows her to predict the sales environment and she can perform well under these circumstances.

Mary likes to use sales aids to augment her presentation. In fact, she often takes too much material. She also tries to cover all the benefits for the buyer. Mary's sales presentations can be time-consuming and drawn out. This can be either a strength or a weakness. The longer, drawn out presentation works best when selling a complex or expensive product. She has, or wants, to develop a routine to her work so she doesn't omit important information. A routine provides her with confidence that she will cover all the benefits. Objections raised by intimidating buyers will

SALES CHARACTERISTICS

frustrate her. They are looking for direct answers to their objections, and she may feel threatened by their approach. Mary limits the use of emotion in her presentation. She personally is not influenced by emotion, and therefore limits its use. She usually answers objections with facts and data. If she lacks this information, don't expect her to make up an answer. She may display frustration when confronted with objections she doesn't have the proper data to answer.

Mary usually responds slowly to resistance when she is closing. She doesn't like confrontation, so she will avoid the resistance if possible. She loves to service what she sells. In fact, this represents one of her strengths. She can be guilty of spending too much time servicing old accounts and not enough time selling new accounts. She may accept and agree with the buyer who isn't ready to buy today. Buyers who want to think it over are usually given the chance. She will call back to get their decision. Mary tends to use the soft-sell approach to closing. She won't close hard, but will continue to call on the account until she gets the sale. Persistence may be her best closing method. She will take the time to see that all her accounts are serviced to the best of her ability.

VALUE TO THE ORGANIZATION

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

- Good at reconciling factions--is calm and adds stability.
- Will follow instructions.
- Service-oriented.
- Will gather data for decision making.
- People-oriented.
- Patient and empathetic.
- Concerned about quality.
- Respect for authority and organizational structure.

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 Mary. 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 Mary most frequently.

Do:

- Take your time and be persistent.
- Be sincere and use a tone of voice that shows sincerity.
- Provide solid, tangible, practical evidence.
- Provide personal assurances, clear, specific solutions with maximum guarantees.
- Define clearly (preferably in writing) individual contributions.
- Look for hurt feelings, personal reasons, if you disagree.
- Provide guarantees that her decision will minimize risks; give assurance that provides her with benefits.
- Keep conversation at discussion level.
- Give her time to ask questions.
- Limit your use of gestures.
- Use scheduled timetable when implementing new action.
- Be prepared.

DON'TS ON COMMUNICATING

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

- Overuse emotions.
- Give your presentation in random order.
- Be abrupt and rapid.
- Patronize or demean her by using subtlety or incentive.
- Debate about facts and figures.
- Use testimonies from unreliable sources.
- Talk in a loud voice or use confrontation.
- Overuse gestures.
- Don't be haphazard.
- Keep deciding for her, or she'll lose initiative; don't leave her without backup support.
- Rush her in the decision-making process.

SELLING TIPS

This section provides suggestions on methods which will improve Mary's communications when selling to different styles. The tips include a brief description of typical people in which she may interact. By adapting to the communication style desired by other people, Mary 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 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 Mary'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 Mary enjoys and also those that create frustration.

- A stable and predictable environment.
- Needs personal attention from her sales manager and compliments for each assignment well done.
- Needs an opportunity to deal with customers with whom a long-standing relationship has been established.
- Work place where people seldom get mad.
- Assignments that can be completed one at a time.
- Sales territory for which standards and goals are established.
- Old sales territory as compared with new sales territory.

PERCEPTIONS

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

"See Yourself As Others See You"

SELF-PERCEPTION

Mary 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

DESCRIPTORS

Based on Mary's responses, the report has marked those words that describe her personal behavior. They describe how she solves problems and meets challenges, influences people, responds to the pace of the environment and how she 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	Opinionated
Undemanding	Suspicious	Impatient	Unsystematic
Cautious	Matter-of-Fact	Pressure-Oriented	Self-Righteous
Mild	Incisive	Eager	Uninhibited
Agreeable	Pessimistic	Flexible	Arbitrary
Modest	Moody	Impulsive	Unbending
Peaceful	Critical	Impetuous	Careless with Details
Unobtrusive		Hypertense	

NATURAL AND ADAPTED SELLING STYLE

Mary'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)

Mary is somewhat conservative in her approach to solving problems and usually doesn't push potential prospects to make quick high-risk decisions. She will accept challenges by being quite calculating in her response to the challenge. She will be quite cooperative by nature and attempt to avoid confrontation as she wants to be seen as a salesperson who is "easy" to work with.

PROBLEMS - CHALLENGES (Adapted)

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

PEOPLE - CONTACTS (Natural)

Mary is factual and logical in her attempt to persuade others. She looks at things in a rather direct and straightforward manner. Her approach can be analytical and objective when attempting to influence others.

PEOPLE - CONTACTS (Adapted)

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

NATURAL AND ADAPTED SELLING STYLE

PACE - CONSISTENCY (Natural)

Mary is comfortable in a sales environment where she can sell to customers and provide service in a predictable environment. She prefers to sell products that have proven dependability in a territory that she knows.

PACE - CONSISTENCY (Adapted)

Mary sees a need to listen positively and ask problem questions to discover the true needs of her prospects. She feels this must be done in a steady and consistent manner.

PROCEDURES - CONSTRAINTS (Natural)

Mary sees the need to be flexible about rules; however, she is also aware and sensitive to the consequence of not following those rules.

PROCEDURES - CONSTRAINTS (Adapted)

Mary is cautious in her sales approach and will attempt to minimize risk. She will be dedicated in her presentation and comply with the company's sales policies. She will seek management approval before changing the sales policy to meet her prospect's needs. Mary will not exaggerate any of the potential results her product or service will deliver. She will only make claims in her presentation that she can document.

ADAPTED STYLE

Mary 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.

- Using much data and sales aids for presentations.
- Remaining cooperative in meeting the customer's needs.
- Depending on a proven method to sell her service or product.
- Using a calculated approach during presentations.
- Using humor as a way of coping with conflict.
- Having all the facts available before making a call.
- Attentive to the details that are involved with selling.
- Using persistence and patience to achieve her goals.
- Cautious in potentially risky sales situations.
- Using a systematic approach in the sales process.
- Avoiding an emotional involvement with the product or service she represents.

KEYS TO MOTIVATING

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

Mary wants:

- To work with people with whom she can trust.
- Freedom from conflict and confrontation.
- Safety procedures.
- Complete directions for work to be completed and planned sales presentation in writing.
- To be persuaded by logic and emotion.
- Door openers or sales aids that open doors.
- Advancement when she is ready.
- Time to adjust to changes in the job or territory.
- To be recognized for her continuance of quality work.
- A predictable environment.
- Operating procedures in writing.

KEYS TO MANAGING

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

Mary needs:

- A participative climate in sales meetings that allow her to share her ideas.
- A quality and time-tested product to sell.
- Clear assignments with detailed instructions.
- Training to handle sales objections.
- To set professional and family goals.
- Capable associates with which to work.
- To speak up when she knows she is right.
- Reassurances that she is doing the job right.
- A warm and friendly work environment.
- A way to say "no" when she feels "no" to the demanding customers.
- Assistance in selling new or difficult customers.

AREAS FOR IMPROVEMENT

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

Mary has a tendency to:

- Deliver long presentations covering all the points at a slow pace.
- Spend too much time servicing and not selling.
- Give a false sense of compliance to superiors because she fights passively and you do not know she is in disagreement.
- Not sell new products until she has all the product knowledge.
- Be family-oriented--may resist overnight traveling.
- Confuse loyalty with performance, especially if her loyalty is rewarded.
- Not be as forceful in closing as the situation may call for.
- Be relaxed and contented with present position.

ACTION PLAN

Name: Mary Allard

The following are examples of areas in which Mary 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

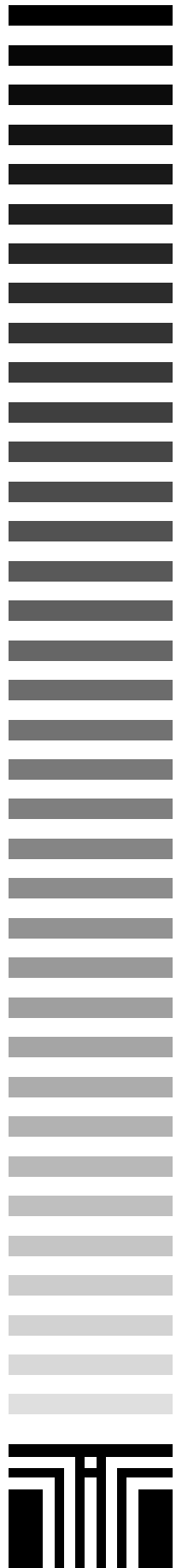
Mary Smith

Sales

Client Company, Inc.

11-22-2004

Performance Matters ReDefined
800-452-3896
www.pmredefined.com



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

Mary Smith

PREPARATION

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



PRESENTATION

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



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

Mary Smith

CHALLENGE ORIENTED

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



SELF-STARTER

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



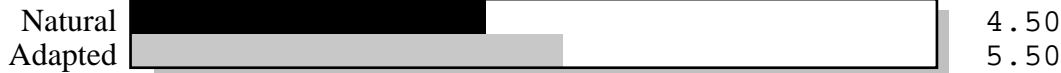
RESULTS ORIENTED

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



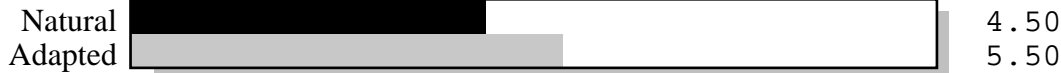
PROSPECTING

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

Mary Smith

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

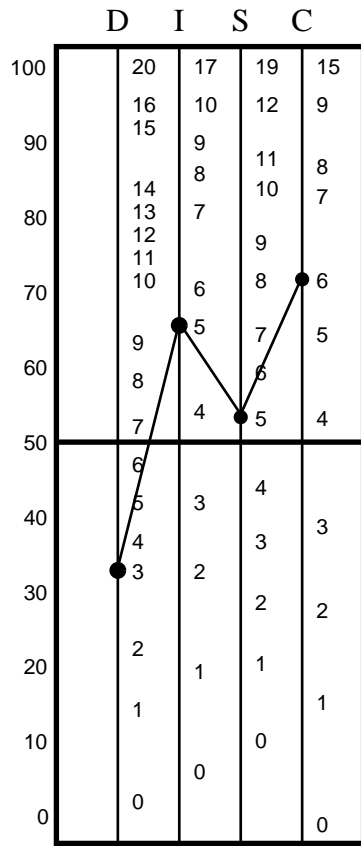


STYLE ANALYSIS™ GRAPHS

Mary Smith

11-22-2004

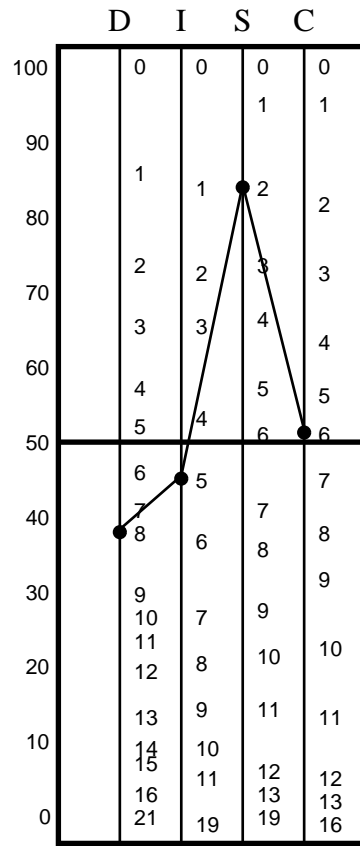
MOST
Graph I
Adapted Style



Score
%

3	5	5	6
34	66	54	72

LEAST
Graph II
Natural Style



8	5	2	6
39	46	84	52

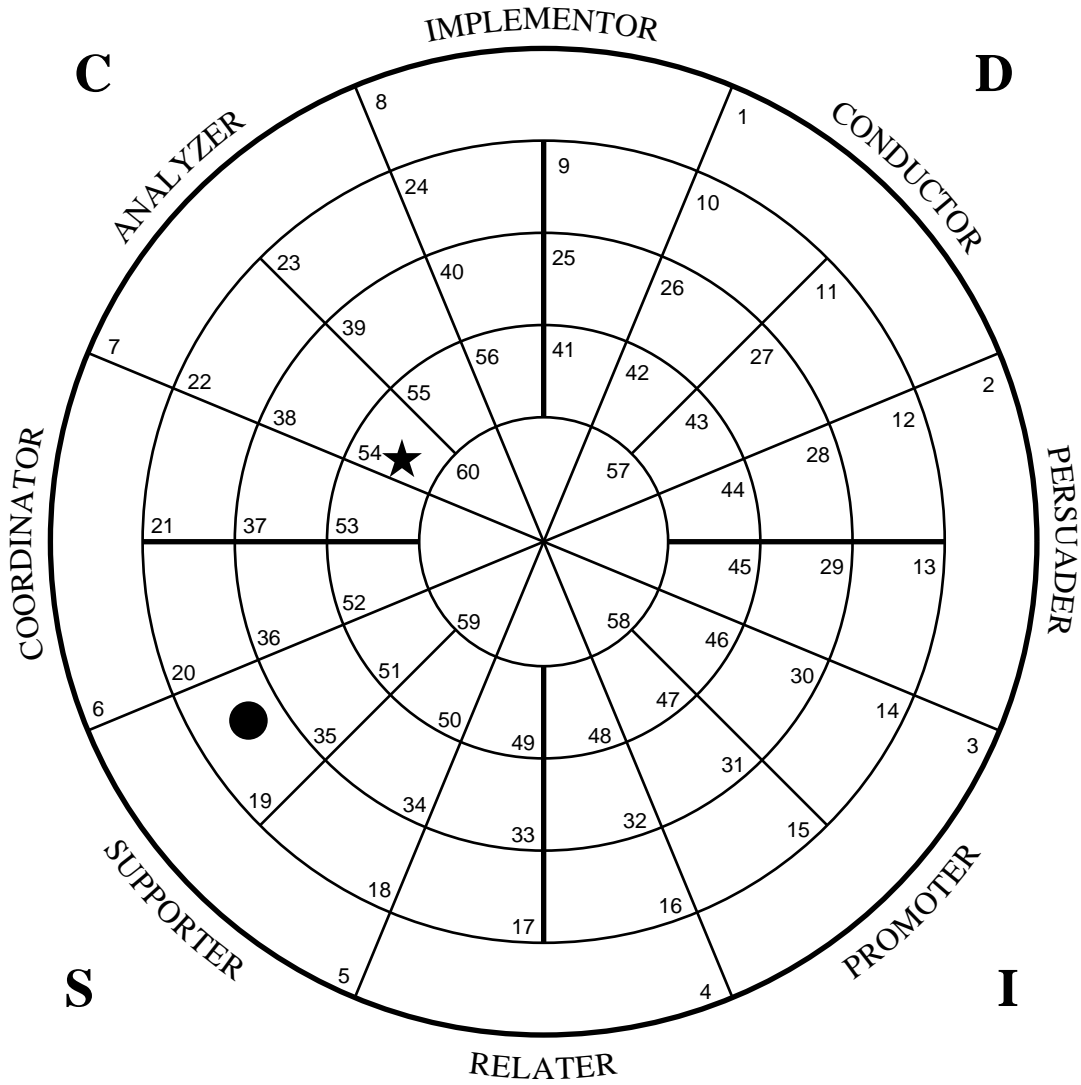
THE SUCCESS INSIGHTS® WHEEL

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.



Adapted: ★ (54) COORDINATING ANALYZER (ACROSS)

Natural: ● (19) COORDINATING SUPPORTER