

# EXCEL Performance Profiles

“Solutions for Effective Performance”

Managing for Success®  
Employee-Manager Version  
**Profile for Mr. John Doe**  
(Sample)



Solutions for Effective Performance



[www.GrowingCoaches.com](http://www.GrowingCoaches.com)  
1-888-89COACH

# MANAGING FOR SUCCESS®

Employee-Manager™ Version

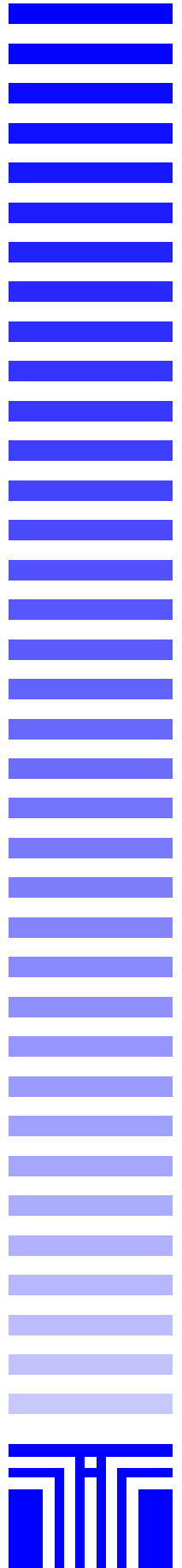
*"He who knows others is learned.  
He who knows himself is wise."  
-Lao Tse*

**John Doe**  
Vice President  
Growing Inc.  
9-3-2001

COMPLIMENTARY REPORT - NOT FOR SALE OR SEMINAR USE

Performance and Productivity Solutions by

EXCEL GROUP DEVELOPMENT - [www.excelgroupdev.com](http://www.excelgroupdev.com)  
110 Eglinton Ave. E. Suite 703  
Toronto, ON Canada M4P 2Y1  
(416)481-4802  
[excelgrp@istar.ca](mailto:excelgrp@istar.ca)



# 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*

# GENERAL CHARACTERISTICS

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

COMPLIMENTARY REPORT - NOT FOR SALE OR SEMINAR USE

John is optimistic and usually has a positive sense of humor. He is gregarious and sociable. He will be seen as a good mixer both on or off the job. He influences most people with his warmth. He is most likely to be at his best in situations where important things, such as values, judgments, feelings and emotions are involved. He prides himself on his "intuition." John is good at creating enthusiasm in others. He tries to influence others through a personal relationship and many times will perform services to develop this relationship. He places his focus on people. To him, strangers are just friends he hasn't met! He likes quality social relationships. He often will become friends with his customers or clients. John likes feedback from his manager on how he is doing. He wants to be liked by everyone and to be recognized for his willingness to help others in time of need.

John is good at giving verbal and nonverbal feedback that serves to encourage people to be open, to trust him and to see him as receptive and helpful. Because of his trust and willing acceptance of people, he may misjudge the abilities of others. When he has strong feelings about a particular problem, you should expect to hear these feelings, and they will probably be expressed in an emotional manner. He likes working for managers who make quick decisions. John will not be overlooked nor uninvolved. He will consistently try to inspire people to his point of view. He may be inconsistent in disciplining others. He likes to be involved in the decision-making process. He is good at solving problems that deal with people.

## GENERAL CHARACTERISTICS

John will know many people. He has a tendency to be a name dropper. He may do this without thinking, trying to establish rapport with people he may not know well. He has the ability to look at the whole problem; for example, thinking about relationships, being concerned about the feelings of others and focusing on the real impact of his decisions and actions. It is important for John to use his people skills to "facilitate" agreement between people. He tends to look at all the things the group has in common, rather than key in on the differences. He judges others by their verbal skills and warmth. John tends to influence people to his way of thinking by using verbiage as compared with others who like to use reports. He is people-oriented and verbally fluent. He is comfortable with most people and can be quite informal and relaxed with them. Even when dealing with strangers, John will attempt to put them at ease. He has a tendency, which he regards as an ability, to talk smoothly, readily and at length.

# 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.*

COMPLIMENTARY REPORT - NOT FOR SALE OR SEMINAR USE

- Creative problem solving.
- Ability to handle many activities.
- Verbalizes his feelings.
- People-oriented.
- Accomplishes goals through people.
- Few dull moments.
- Positive sense of humor.
- Sense of urgency.

# 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.*

COMPLIMENTARY REPORT - NOT FOR SALE OR SEMINAR USE

Do:

- Provide testimonials from people he sees as important.
- Verify that the message was heard.
- Provide a warm and friendly environment.
- Put projects in writing, with deadlines.
- Use his jargon.
- Be isolated from interruptions.
- Leave time for relating, socializing.
- Be specific and leave nothing to chance.
- Provide ideas for implementing action.
- Be open, honest and informal.
- Deal with details in writing, have him commit to modes of action.
- Provide systems to follow.
- Ask for his opinions/ideas regarding people.

# 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.*

COMPLIMENTARY REPORT - NOT FOR SALE OR SEMINAR USE

Don't:

- Be dictatorial.
- Leave decisions hanging in the air.
- Forget to follow-up.
- Talk down to him.
- Let him change the topic until you are finished.
- Legislate or muffle--don't overcontrol the conversation.
- Drive on to facts, figures, alternatives or abstractions.
- Be curt, cold or tight-lipped.
- Kid around too much, or "stick to the agenda" too much.
- Use paternalistic approach.
- Take credit for his ideas.
- Talk too slowly, or dwell on details to excess.
- Waste time trying to be impersonal, judgmental or too task-oriented.

# COMMUNICATION TIPS

*This section provides suggestions on methods which will improve John's communications with others. 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 communicator.*

COMPLIMENTARY REPORT - NOT FOR SALE OR SEMINAR USE

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

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

Factors that will create tension or dissatisfaction:

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

When communicating with a person who is magnetic, enthusiastic, friendly, demonstrative and political:

- Provide a warm and friendly environment.
- Don't deal with a lot of details (put them in writing).
- Ask "feeling" questions to draw their opinions or comments.

Factors that will create tension or dissatisfaction:

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

# COMMUNICATION TIPS

When communicating with a person who is patient, predictable, reliable, steady, relaxed and modest:

- Begin with a personal comment--break the ice.
- Present your case softly, nonthreateningly.
- Ask "how?" questions to draw their opinions.

Factors that will create tension or dissatisfaction:

- Rushing headlong into business.
- Being domineering or demanding.
- Forcing them to respond quickly to your objectives.

When communicating with a person who is dependent, neat, conservative, perfectionist, careful and compliant:

- Prepare your "case" in advance.
- Stick to business.
- Be accurate and realistic.

Factors that will create tension or dissatisfaction:

- Being giddy, casual, informal, loud.
- Pushing too hard or being unrealistic with deadlines.
- 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.*

COMPLIMENTARY REPORT - NOT FOR SALE OR SEMINAR USE

- New products and new ideas to work on.
- Support team with sense of urgency.
- Work for a manager who makes quick decisions.
- Freedom of movement.
- Democratic supervisor with whom he can associate.
- Assignments with a high degree of people contacts.
- Freedom from long, detailed reports.

# 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.*

COMPLIMENTARY REPORT - NOT FOR SALE OR SEMINAR USE

"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.*

COMPLIMENTARY REPORT - NOT FOR SALE OR SEMINAR USE

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 STYLE

*John'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.*

COMPLIMENTARY REPORT - NOT FOR SALE OR SEMINAR USE

## PROBLEMS - CHALLENGES (Natural)

John is ambitious in his approach to problem solving, displaying a strong will and a need to win against all obstacles. John has a tendency to make decisions with little or no hesitation.

## PROBLEMS - CHALLENGES (Adapted)

John sees the need to be competitive, results-oriented and a little innovative in his approach to problem solving. He has a tendency to evaluate the risk before rushing into solving a problem.

## 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 virtues of his personality and verbal skills. He will convince you that what he is saying is not only right, but is exactly what is needed. He displays enthusiasm for almost any project.

## PEOPLE - CONTACTS (Adapted)

John 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.

# NATURAL AND ADAPTED STYLE

## PACE - CONSISTENCY (Natural)

John is comfortable in an environment that is constantly changing. He seeks a wide scope of tasks and duties. Even when the environment is frantic, he can still maintain a sense of equilibrium. He is capable of taking inconsistency to a new height and to initiate change at the drop of the hat.

## PACE - CONSISTENCY (Adapted)

John sees his natural activity style to be just what the environment needs. What you see is what you get for activity level and consistency. Sometimes he would like the world to slow down.

## PROCEDURES - CONSTRAINTS (Natural)

John is somewhat open-minded, but aware and sensitive to the implications of not following the rules. He can display balanced judgment in reviewing procedures. Knowing he is doing things well is a key reinforcement for him.

## PROCEDURES - CONSTRAINTS (Adapted)

John seeks adventure and excitement. He wants to be seen as his own person and will break rules to display this desire for independence. He wants to be judged by the bottom-line results--not how those results were achieved.

## 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.*

COMPLIMENTARY REPORT - NOT FOR SALE OR SEMINAR USE

- Firm commitment to accomplishments.
- Contacting people using a variety of modes.
- Flaunting independence.
- Being creative and unconventional in making a point.
- Obtaining results through people.
- Making tactful decisions.
- Maintaining an ever-changing, friendly, work environment.
- Preferring people involvement over task focus.
- Optimistic, future-oriented outlook.
- Responding well to challenges: "You say I can't do it? Just watch me!"
- Acting independently and without precedent.
- Willing to take risks when others may be hesitant.

# 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."*

COMPLIMENTARY REPORT - NOT FOR SALE OR SEMINAR USE

John wants:

- Exposure to those who appreciate his results.
- No close supervision.
- Participation in meetings on future planning.
- Unusual, new or difficult assignments.
- Working conditions with freedom to move and to talk to people.
- The chance to have fun (play hard--work hard).
- Work assignments that provide opportunity for recognition.
- To be trusted.
- Rewards to support his dreams.
- A forum to ventilate his emotions.
- A manager who practices participative management.

# 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.*

COMPLIMENTARY REPORT - NOT FOR SALE OR SEMINAR USE

John needs:

- Better organization of record keeping.
- To focus conversations on work activities--less socializing.
- To mask emotions when appropriate.
- To maintain focus on results and not sacrifice productivity just to make everyone happy.
- People to work and associate with.
- Deadlines for completion of work.
- Participatory management.
- Vacations or periods of reduced activity level.
- More logical presentations--less emotional.
- To understand the importance of annual physicals because of his activity level.
- Help on controlling time and setting priorities.
- Objectivity when dealing with people because of his high trust level.

# 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.*

COMPLIMENTARY REPORT - NOT FOR SALE OR SEMINAR USE

John has a tendency to:

- Be optimistic regarding possible results of his projects or the potential of his people.
- Have difficulty planning and controlling time expenditure.
- Make decisions based on surface analysis.
- Be unrealistic in appraising people--especially if the person is a "friend."
- Trust people indiscriminately if positively reinforced by those people.
- Overuse praise in motivating others.
- Be inattentive to detail unless that detail is important to him or if detail work is of a short duration.
- Be too verbal in expressing criticism.

# 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.

Communicating (Listening)  
Delegating  
Decision Making  
Disciplining  
Evaluating Performance  
Education

Time Management  
Career Goals  
Personal Goals  
Motivating Others  
Developing People  
Family

Area:

- 1.
- 2.
- 3.

Area:

- 1.
- 2.
- 3.

Area:

- 1.
- 2.
- 3.

Date to Begin: \_\_\_\_\_ Date to Review: \_\_\_\_\_

# BEHAVIORAL FACTOR INDICATOR™

Management Version

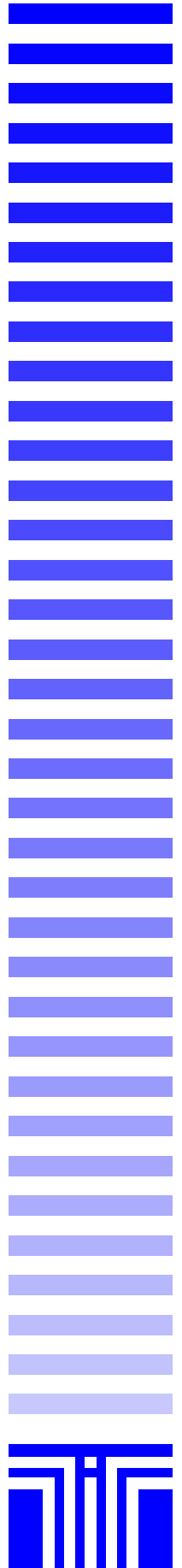
**John Doe**

Vice President  
Growing Inc.  
9-3-2001

COMPLIMENTARY REPORT - NOT FOR SALE OR SEMINAR USE

Performance and Productivity Solutions by

EXCEL GROUP DEVELOPMENT - [www.excelgroupdev.com](http://www.excelgroupdev.com)  
110 Eglinton Ave. E. Suite 703  
Toronto, ON Canada M4P 2Y1  
(416)481-4802  
[excelgrp@istar.ca](mailto:excelgrp@istar.ca)



# INTRODUCTION

Classifying management behavior is not an easy undertaking, largely because there are so many variables on which classifications could be based. The classifications in this report are purely behavioral. Behavioral measurement can be classified as how a person will do a job. No consideration has been given to age, experience, training or values.

Your report will graphically display your behavioral skills in 12 specific factors. Each factor was carefully selected allowing anyone to be successful if they meet the behavioral demands of the job.

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, 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.

# SPECIFIC FACTOR ANALYSIS

John Doe

## DECISIVENESS/RESULTS ORIENTED

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



## SENSE OF URGENCY

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



## VISION FOR THE FUTURE

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



## MOTIVATING OTHERS

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



## SELF-CONFIDENCE

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



## CUSTOMER/EMPLOYEE INTERFACE

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



# SPECIFIC FACTOR ANALYSIS

John Doe

## LISTENING

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



## CONSISTENCY

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



## PAPERWORK

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



## ATTENTION TO DETAIL

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



## FOLLOWING POLICY

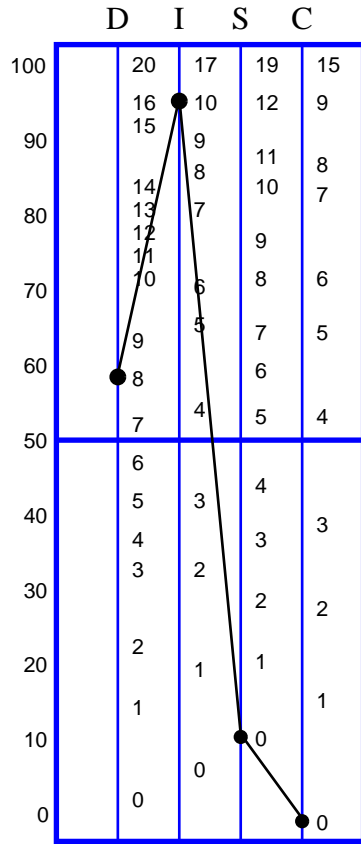
0...1...2...3...4...5...6...7...8...9...10



# STYLE ANALYSIS™ GRAPHS

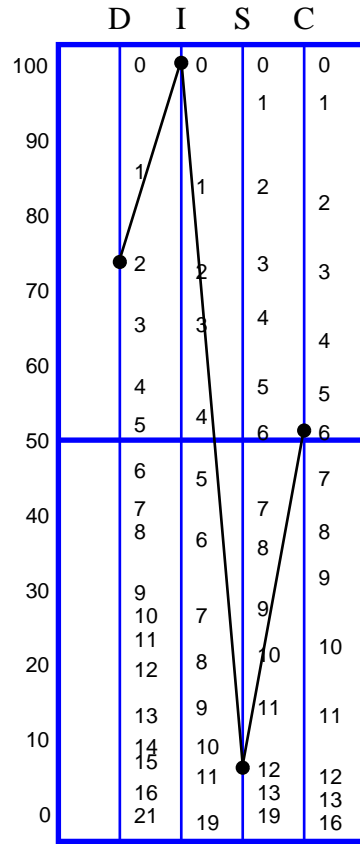
**John Doe**  
 Growing Inc.  
 9-3-2001

**MOST**  
 Graph I  
 Adapted Style



Score	8	10	0	0
%	59	95	12	1

**LEAST**  
 Graph II  
 Natural Style



Score	2	0	12	6
%	74	100	8	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:

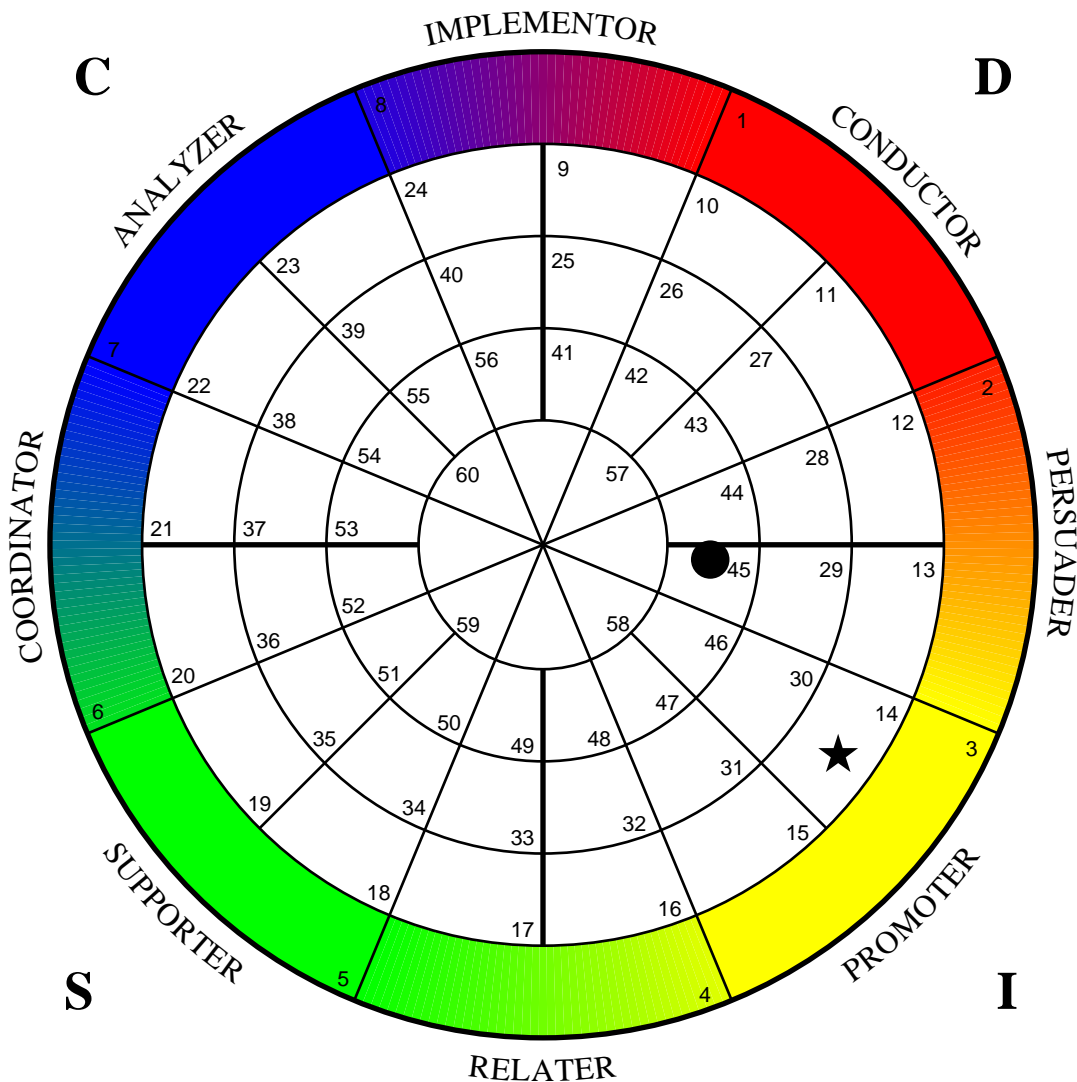
- View your natural behavioral style (circle).
- View your adapted behavioral style (star).
- Note the degree you are adapting your behavior.
- If you filled out the Work Environment Analysis, view the relationship of your behavior to your job.

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.

# THE SUCCESS INSIGHTS® WHEEL

**John Doe**  
 Growing Inc.  
 9-3-2001



Adapted: ★ (14) PERSUADING PROMOTER  
 Natural: ● (45) PROMOTING PERSUADER (ACROSS)