

EXCEL Performance Profiles

“Solutions for Effective Performance”

Managing for Success®

Sales Version

Profile for Ms Jane Doe

(Sample)



Solutions for Effective Performance



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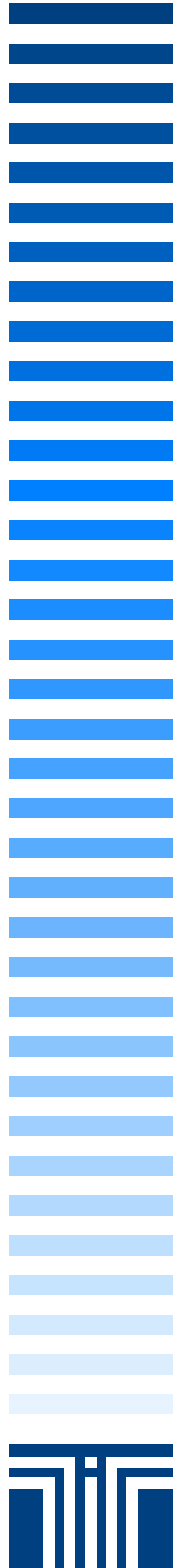
MANAGING FOR SUCCESS®

Sales Version

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

Jane Doe

5-7-2001



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 Jane'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.

Jane prefers to sell new, innovative products or services. In fact, she often uses creative ways to sell her products or services. She consistently meets the challenge of persuading people to her point of view. Some buyers may desire less talk and more facts. She maintains a high trust level; that is, she trusts that people will make good on their promises. She has a tendency to use her fluent verbal skills to paint detailed and vivid "word pictures" for her customers. Jane likes cold calls because they present a challenge. She feels her verbal skills will help her win. Every cold call provides an opportunity to win friends and influence people. She can become emotional about the product or service that she provides to her clients or customers. She prefers to sell a new client on herself first rather than her product or service. This reflects her natural approach. When she buys, she also prefers to be sold in this manner.

Jane may be rather careless in her sales preparation. She truly believes she can walk and talk her way through any presentation at anytime, anyplace. She may promise how her product will solve the prospect's problems. Sometimes she becomes overly optimistic about the actual results her products will deliver. She doesn't necessarily do this intentionally, but reflects her optimistic view of the product. She may not always listen to what her prospects are saying. Her desire to verbalize and control the presentation often may hinder her ability to listen. She may also be guilty of interrupting the prospect to get her point across. Some see her as a natural born salesperson but what they really see is her ability to talk smoothly and readily on most subjects. She quickly shares her opinion on most topics. Jane welcomes the objections that prospects raise. This provides an

SALES CHARACTERISTICS

opportunity to meet a challenge and share more of her knowledge. She frequently uses emotion and active body language in her sales presentation. With some buyers this could be detrimental because they may see her as being superficial.

Jane's listening skills may cause her to miss some closing opportunities. She may be thinking about what she is going to say next and miss the buying signal. She may promise more than she can deliver to close a sale. She does intend to deliver what she says, but she has difficulty finding the time to provide what she promises. Her optimism makes her believe she can deliver. She probably has several favorite closes. She needs to evaluate the way she is using them and if they are appropriate to the sales situation. She has a good sense of urgency to get things done quickly. Sometimes this will not allow her the patience needed to service some of her accounts. Sometimes she tries too hard to accommodate the buyer with service. She will resent her effort if the account doesn't live up to its potential. If given the choice, she would prefer to sell a new account instead of servicing an old account. This is especially true if the old account has little potential or requires sufficient facts and data to support their purchase decisions.

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 and selling.
- Tenacious.
- Thinks big.
- Positive sense of humor.
- Optimistic and enthusiastic.
- Forward-looking and future-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.
- Offer special, immediate and extra incentives for her willingness to take risks.
- Talk about her, her goals and opinions she finds stimulating.
- 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 a warm and friendly environment.
- Ask for her opinions/ideas regarding people.
- Provide testimonials from people she sees as important.
- Take issue with facts, not the person, if you disagree.
- Support the results, not the person, if you agree.
- Leave time for relating, socializing.
- Motivate and persuade by referring to objectives and results.

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:

- Let disagreement reflect on her personally.
- Drive on to facts, figures, alternatives or abstractions.
- Waste time trying to be impersonal, judgmental, or too task-oriented.
- Leave decisions hanging in the air.
- "Dream" with her or you'll lose time.
- Try to convince by "personal" means.
- Ramble on, or waste her time.
- Take credit for her ideas.
- Come with a ready-made decision, and don't make it for her.
- Direct or order.
- Kid around too much, or "stick to the agenda" too much.
- Try to build personal relationships.

SELLING TIPS

This section provides suggestions on methods which will improve Jane'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, 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 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 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.
- Freedom of movement.
- Forum to express ideas and viewpoint.
- An innovative and futuristic-oriented environment.
- Work tasks that change from time to time.
- Assignments with a high degree of people contacts.
- Democratic supervisor with whom she can associate.

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:

Enthusiastic
Charming
Persuasive

Outgoing
Inspiring
Optimistic

OTHERS' PERCEPTION

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

Self-Promoting
Overly Optimistic

Glib
Unrealistic

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

Overly Confident
Poor Listener

Talkative
Self-Promoter

DESCRIPTORS

Based on Jane'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	
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

Jane'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)

Jane is ambitious in her approach to selling, displaying a strong will and has a need to win against all obstacles. She has a tendency to confront prospects and desire to control the sales situation. She needs a territory and products that will constantly challenge her.

PROBLEMS - CHALLENGES (Adapted)

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

PEOPLE - CONTACTS (Natural)

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

PEOPLE - CONTACTS (Adapted)

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.

NATURAL AND ADAPTED SELLING STYLE

PACE - CONSISTENCY (Natural)

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

PACE - CONSISTENCY (Adapted)

Jane feels that the sales environment doesn't require her to alter the way she deals with activity level and consistency.

PROCEDURES - CONSTRAINTS (Natural)

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

PROCEDURES - CONSTRAINTS (Adapted)

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

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.

- Unafraid to overstep authority when necessary to make a sale.
- Using great social strengths in approaching new prospects.
- Generating enthusiasm in others.
- Excited about available new products or services.
- Independent in approaching customers or clients.
- Making a presentation in her own particular style.
- Verbally stressing the benefits of her product or service.
- Firm, unbending dedication to completing sales projects.
- Meeting customers either formally or informally.
- Uninhibited in making a creative sales presentation.
- Setting her own agenda for results.

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:

- No restrictions to hamper results.
- Rewards to support her dreams.
- Unusual, new or difficult products to sell.
- Exciting place to work.
- Exposure to those who appreciate her sales results.
- Independence.
- A support system to do the detail work.
- Working conditions with freedom to move and to talk to people.
- The chance to have fun (play hard--work hard).
- Freedom to talk and participate in sales meetings.
- Freedom from many rules and regulations.
- Group activities outside the job.

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:

- More logical presentations--less emotional.
- To be informed of things which affect her.
- To mask emotions when appropriate.
- To be confronted when in disagreement or when she breaks the rules.
- To focus conversations on work activities--less socializing.
- A program for pacing work and relaxing.
- To negotiate commitment face-to-face.
- To maintain focus on results and not sacrifice productivity just to make everyone happy.
- Help on controlling time and setting priorities.
- To understand her role on the team--either a team player or the leader.
- Objectivity in managing a sales territory.
- More control of body language.

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:

- Have difficulty planning and controlling time.
- Be more concerned with popularity than sales results.
- Give away products or services to make client happy.
- "Oversell" or talk her way out of a sale by focusing on irrelevant things.
- Be unrealistic in appraising a client's credit.
- Make promises she can't keep.
- Dislike call reports, etc.
- Be more concerned with popularity than tangible results, if popularity is rewarded.
- Be a situational listener.

ACTION PLAN

Name: Jane Doe

The following are examples of areas in which Jane 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.

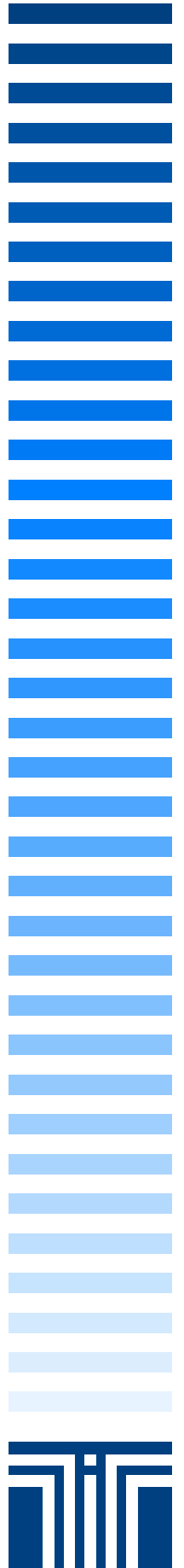
Date to Begin: _____ Date to Review: _____

BEHAVIORAL FACTOR INDICATOR™

Sales Version

Jane Doe

5-7-2001



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

Jane Doe

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

Jane Doe

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

Jane 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

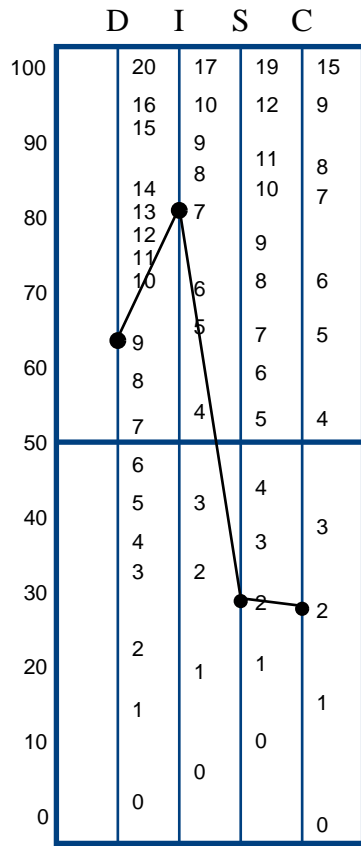


STYLE ANALYSIS™ GRAPHS

Jane Doe

5-7-2001

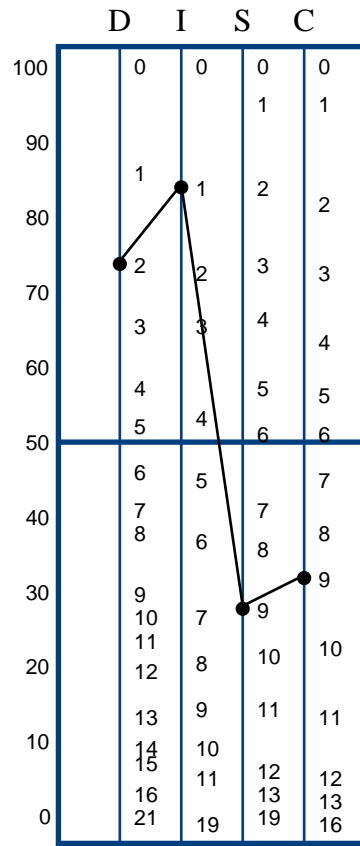
MOST
Graph I
Adapted Style



Score
%

9	7	2	2
64	81	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.

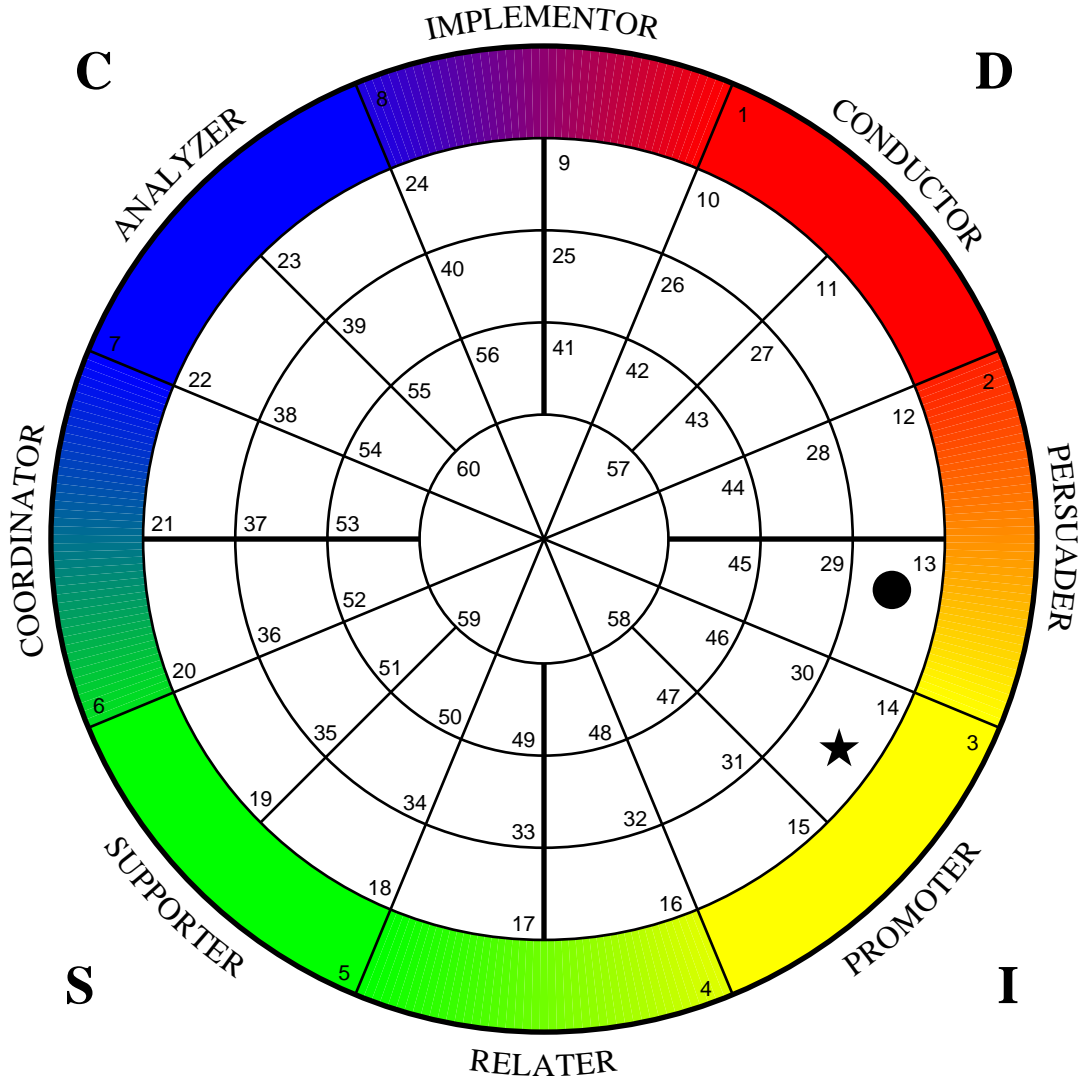
Notice on the next page that your Natural style (circle) and your Adapted style (star) are plotted on the Wheel. If they are plotted in different boxes, then you are adapting your behavior. The further the two plotting points are from each other, the more you are adapting your behavior.

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

Jane Doe

5-7-2001



Adapted: ★ (14) PERSUADING PROMOTER

Natural: ● (13) PROMOTING PERSUADER