

CONFIDENTIAL

ProfileXT™

Decision Point LLC

SALES MANAGEMENT REPORT

John Sample
Sales Representative

DECISION POINT LLC

415 Silas Deane Highway Suite 100
Wethersfield, CT 06109
860-563-5759



Introduction

The Sales Management Report for John Sample provides information that can be helpful in managing, motivating, and coaching John for increased productivity. This report reflects the responses provided by John Sample when he completed the **Profile XT** assessment. Results are illustrated on a scale from 1 to 10. The darker area on the scale represents the Job Match target pattern selected by your company for the position. The enlarged segment of the scale shows where John scored. If the enlarged segment is dark, John is in the Job Match pattern; if it is light, he is not. Information about John is reported in these five categories:

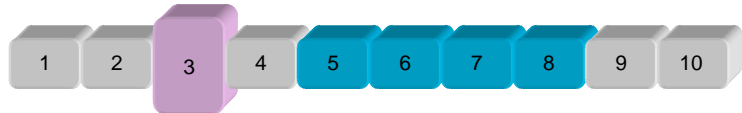
- **Profile for Thinking Style** – Learning index, Verbal Skill, Verbal Reasoning, Numerical Ability, and Numeric Reasoning.
- **Profile for Behavioral Traits** – Energy Level, Assertiveness, Sociability, Manageability, Attitude, Decisiveness, Accommodating, Independence, and Objective Judgment.
- **Profile for Interests** – Enterprising, Financial/Administrative, People Service, Creative, Technical, and Mechanical.
- **The Total Person** – Additional information regarding John and the significance of his scores.
- **Coaching Recommendations** – Ideas for your consideration when coaching John.

Please consult the User's Guide for additional information on using these results in working with John.

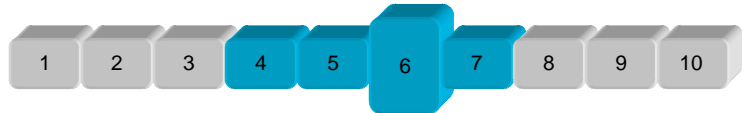
Profile for Thinking Style

The darker shading represents the Job Match Pattern for the role of this pattern. The larger box indicates this individual's score.

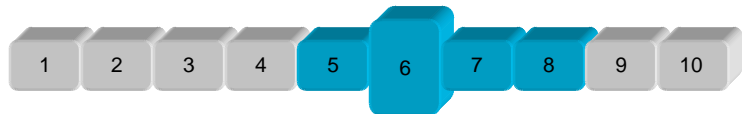
Learning Index – An index of expected learning, reasoning and problem solving potential.



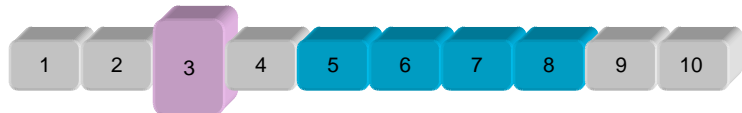
Verbal Skill – A measure of verbal skill through vocabulary.



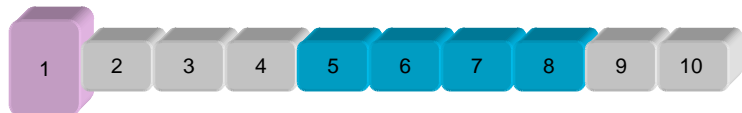
Verbal Reasoning – Using words as a basis in reasoning and problem solving.



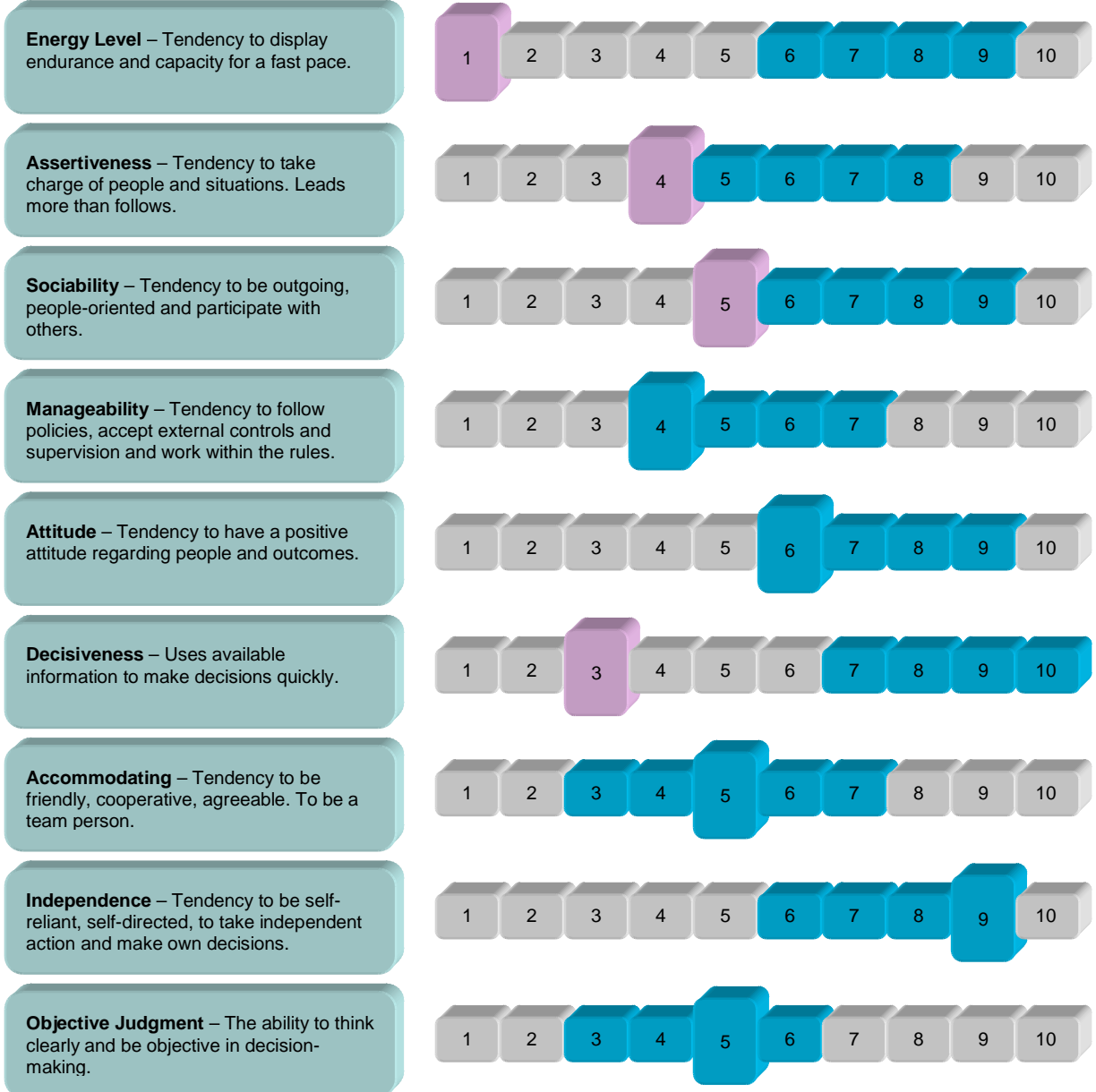
Numerical Ability – A measure of numeric calculation ability.



Numeric Reasoning – Using numbers as a basis in reasoning and problem solving.



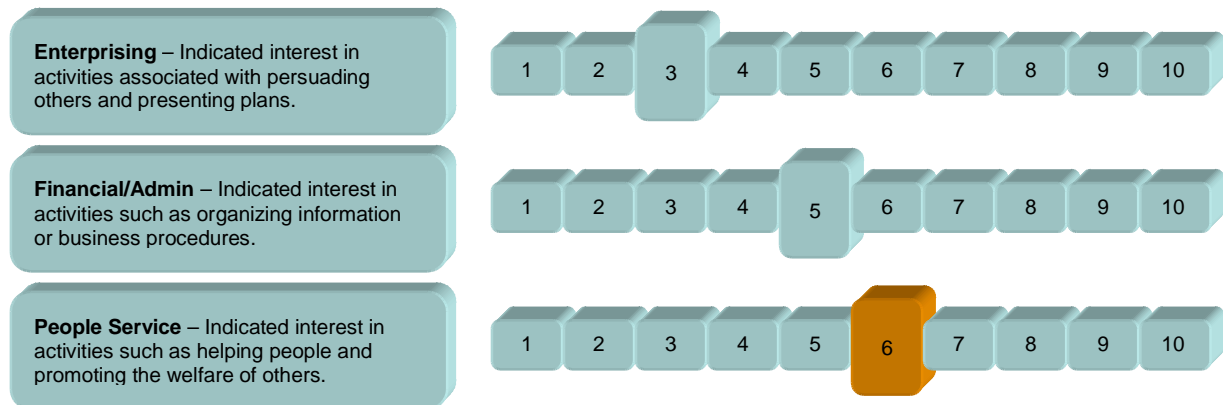
Profile for Behavioral Traits



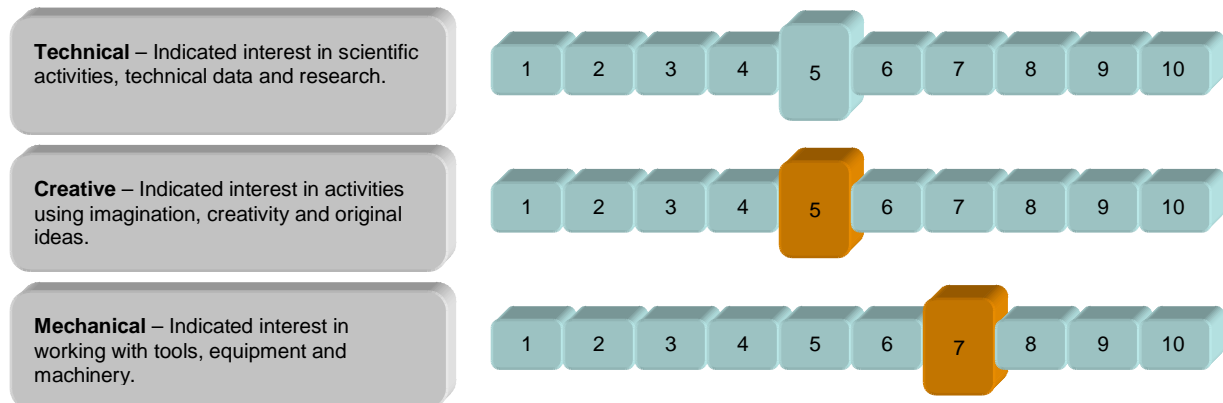
Profile for Interests

For the Job Match Pattern under consideration, the top three interests in descending order are: **Enterprising**, **Financial/Admin**, and **People Service**. The other three interests have no impact on this position. The top three interests for John in descending order are: **Mechanical**, **People Service**, and **Creative**. **Mr. Sample shares one of these interest areas: People Service**

Top three Interests for this sales position



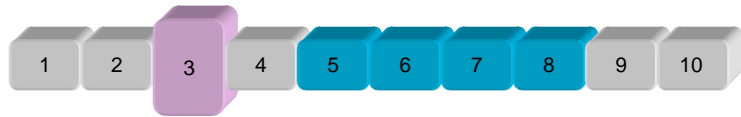
Interests not relevant to this sales position



The Total Person

Thinking Style

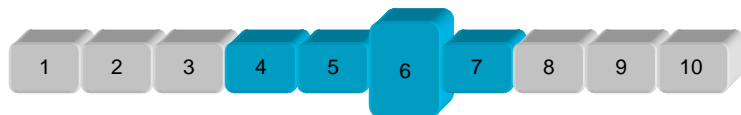
Learning Index – An index of expected learning, reasoning and problem solving potential.



Job Pattern 5-8 Score 3

- o John demonstrates an average ability for the integration of information in new learning situations, but may need extra time in some situations.
- o Mr. Sample could need more time than average to assimilate new information of a complicated or more demanding nature.
- o New information should be presented to John in steps, applying it directly to his work and objectives.
- o Mr. Sample may require repetition in a sales training program.

Verbal Skill – A measure of verbal skill through vocabulary.

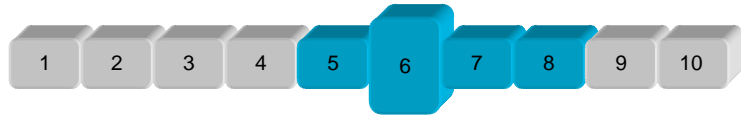


Job Pattern 4-7 Score 6

- o John should be capable of learning to apply basic communication principles to new, more complex sales presentations as necessary.
- o Mr. Sample should be able to grasp simple communication principles that apply to the sales process.
- o He demonstrates a level of verbal skill equivalent to most people in the general population.
- o Mr. Sample is comfortable analyzing basic written and verbal information.

The Total Person

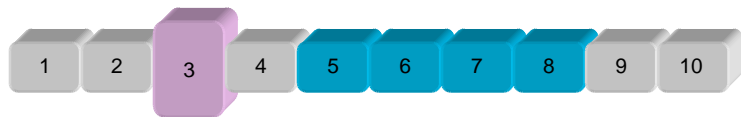
Verbal Reasoning – Using words as a basis in reasoning and problem solving.



Job Pattern 5-8 Score 6

- o Mr. Sample is proficient in the use of words and language.
- o He demonstrates adequate, and in some areas, good verbal skill; certain techniques and complexities will need training before he will be comfortable using them in a sales presentation.
- o John would not be expected to have any difficulty in effectively communicating thoughts and ideas to prospects or clients.
- o Mr. Sample probably will assimilate new information with success, commensurate with the general population.

Numerical Ability – A measure of numeric calculation ability.

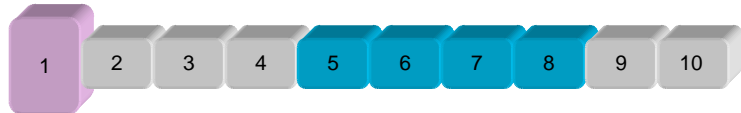


Job Pattern 5-8 Score 3

- o With training and experience, Mr. Sample should be able to more quickly and accurately carry out mathematical functions as they apply to the job.
- o John may not have had much recent opportunity to use numbers while selling.
- o He may require a calculator or computer to handle some numerical problems.
- o Mr. Sample may initially need extra time in mentally computing numerical information.

The Total Person

Numeric Reasoning – Using numbers as a basis in reasoning and problem solving.

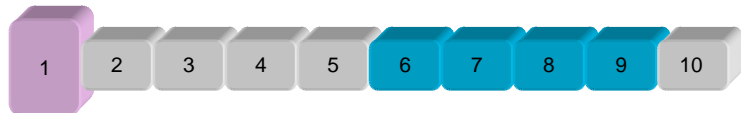


Job Pattern 5-8 **Score 1**

- o His ability to assimilate numerical information requires more time than most people.
- o Look for ways to bring his numerical reasoning into line with his sales duties, emphasizing the basics more than numerically complex implications and decision-making.
- o He may have an aversion to tackle items which demand number concepts, possibly impacting the focus of his duties and sales training.
- o John will likely need some repetition when being presented with new mathematical or numerical concepts.

Behavioral Traits

Energy Level – Tendency to display endurance and capacity for a fast pace.

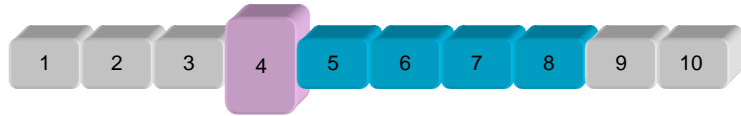


Job Pattern 6-9 **Score 1**

- o He may prefer to have the time to respond to his sales responsibilities at a casual, measured pace.
- o He may not respond in a motivated fashion to being pressured by critical sales deadlines.
- o John demonstrates a low energy level and will require clearly defined priorities and deadlines, as well as some external pacing from his sales manager.
- o Mr. Sample is not inclined to project a high sense of urgency concerning sales tasks and other deadlines.

The Total Person

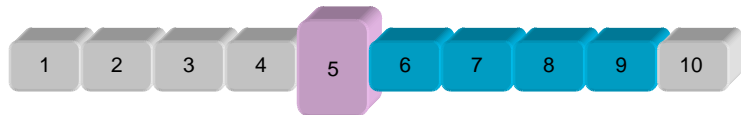
Assertiveness – Tendency to take charge of people and situations. Leads more than follows.



Job Pattern 5-8 **Score 4**

- Mr. Sample is occasionally prepared to take charge of a sales team or lead negotiations, although he is inclined to take a less aggressive approach.
- John tends to prefer sales negotiations that are non-confrontational.
- He tends to be a good listener when negotiating a sale, more comfortable as a facilitator than as an aggressive competitor. Mr. Sample will tend to accept the client's perspective, despite personal disagreements.
- Mr. Sample is slow to be assertive, tending to be more of a follower than a leader in a sales team. John may occasionally back down if confronted by prospects or clients.

Sociability – Tendency to be outgoing, people-oriented and participate with others.

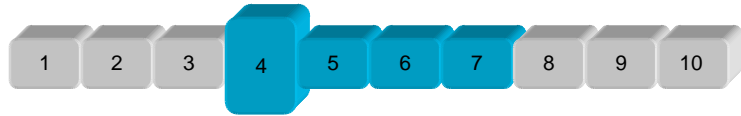


Job Pattern 6-9 **Score 5**

- Mr. Sample prefers an impersonal sales style and may tend to avoid spending time on small talk and social amenities before engaging in the business at hand.
- He expresses only moderate enjoyment of salesmanship involving contact with the public, focusing rather on a detached, task-oriented style of sales service.
- His sociability is best suited for sales tasks that do not involve a great deal of socializing and relationship building.
- Mr. Sample is not particularly motivated by sales assignments that require interpersonal contact, rather preferring to accomplish sales in an impersonal, "strictly business" fashion.

The Total Person

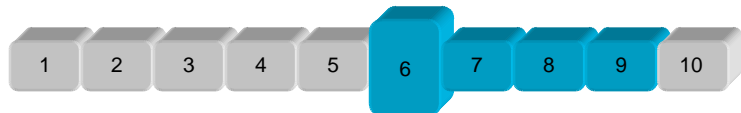
Manageability – Tendency to follow policies, accept external controls and supervision and work within the rules.



Job Pattern 4-7 Score 4

- John demonstrates a generally compliant interpersonal style. He can work within the rules, but prefers as much freedom from restriction as possible when attending to sales goals.
- Mr. Sample may relate to authority in a respectful manner, but must also have the freedom to express personal freedom in his sales duties.
- He has an attitude typical of many salespeople regarding authority and rules, with a generally compliant interpersonal style limited by a strong preference for creative thinking.
- Mr. Sample would relate to authority in a generally cooperative and compliant manner more often if he appreciated specific procedures more.

Attitude – Tendency to have a positive attitude regarding people and outcomes.

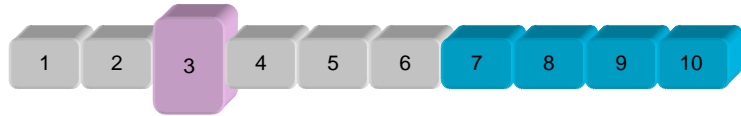


Job Pattern 6-9 Score 6

- Mr. Sample demonstrates a positive attitude regarding the outcome of his sales pursuits in general, occasionally at the expense of pragmatism.
- John tends to express positive expectations for the outcome of sales negotiations and deal making.
- He is usually hopeful for positive outcomes as the result of a negotiation.
- Mr. Sample has a tendency to trust prospects and have faith in the outcome of the sale.

The Total Person

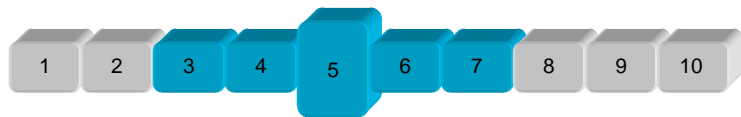
Decisiveness – Uses available information to make decisions quickly.



Job Pattern 7-10 Score 3

- o Mr. Sample has a tendency to pursue sales prospects in a careful yet deliberate manner.
- o John is cautious about making decisions or closing with a prospect too spontaneously.
- o He has a tendency to ponder the consequences of his decisions and actions, to hesitate taking decisive action in a negotiation.
- o Mr. Sample is slow to act with a sense of urgency when confronted with a sales opportunity.

Accommodating – Tendency to be friendly, cooperative, agreeable. To be a team person.

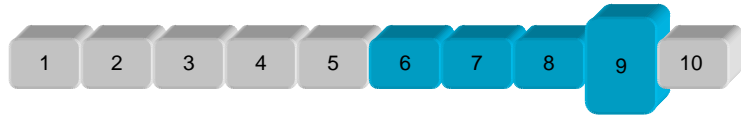


Job Pattern 3-7 Score 5

- o John may be slower than others to avoid arguments, disagreements, and/or conflict, even if this is not what would make the client happy.
- o Mr. Sample may become defensive if someone tries to take advantage of him during a negotiation.
- o Mr. Sample may accept the use of an accommodating approach. He will not cooperate, however, at the sacrifice of his personal sales goals.
- o He can be agreeable, cooperative, and good-natured with clients and co-workers as well as competitive and aggressive. However, John is also willing to defend his point of view and priorities when he feels that he must.

The Total Person

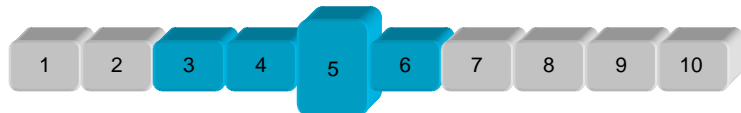
Independence – Tendency to be self-reliant, self-directed, to take independent action and make own decisions.



Job Pattern 6-9 **Score 9**

- o Mr. Sample prefers to pursue prospects on his own and will resist being micro-managed. He can become impatient with a sales manager or executive that demands constant progress updates.
- o He is highly independent, and may require some refocusing in a sales environment that does not encourage this level of autonomy.
- o John is an independent salesperson who prefers minimal guidance and coaching. However, his high level of independence may create frustrations for an exceptionally attentive sales manager.
- o Mr. Sample prefers to undertake new sales projects independently, seeking support only when absolutely necessary to complete the deal.

Objective Judgment – The ability to think clearly and be objective in decision-making.



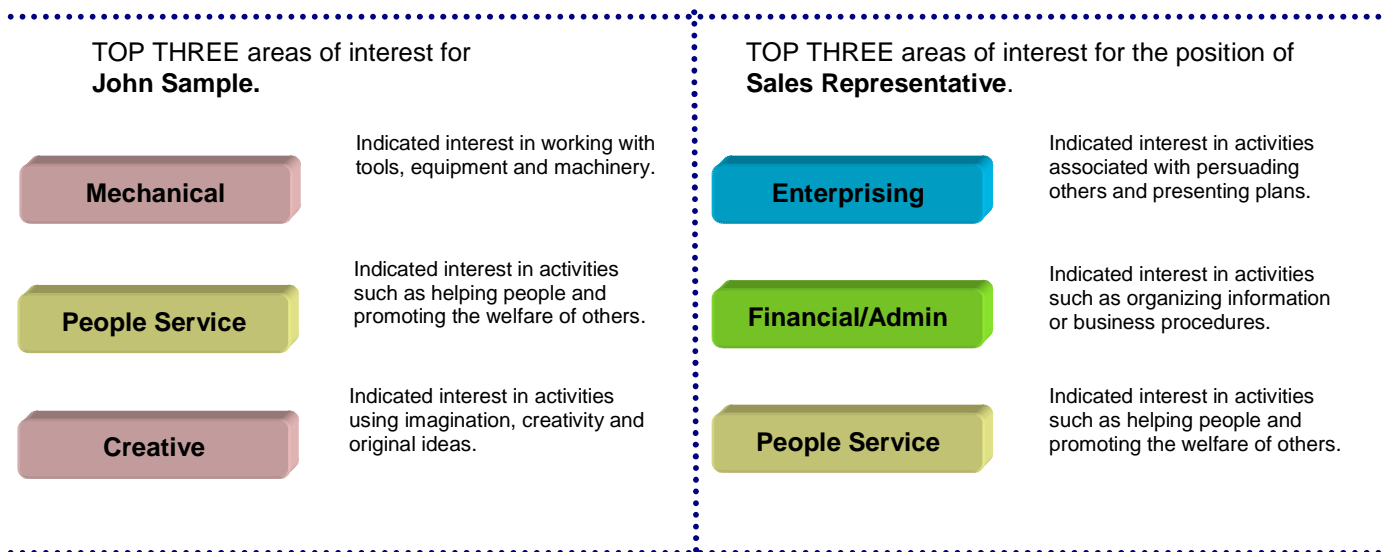
Job Pattern 3-6 **Score 5**

- o His judgment is compatible with intuitive decision-making, collecting, and reviewing sales data only when required.
- o His decisions concerning sales tend to indicate subjective thinking and intuition.
- o His judgment is compatible with spontaneous situations and non-specific sales information.
- o When there is little time to review or acquire data relevant to the sale, John is comfortable following his intuition.

The Total Person

Occupational Interests

The Interest section assesses the relative interests between the six interest areas. The top three interests for Mr. Sample are shown here, along with the top three interests for the Sales Representative position. Note that John shares ONE top interest with the requirements of this position.



Mr. Sample appears to be attracted to positions in which he may apply creative problem solving, especially in industrial settings. His interests are focused on the Creative, Mechanical and People Service themes on the ProfileXT. The composite results here suggest an emphasis on working with and serving the needs of a client or customer through industrial pursuits.

With Mechanical as his primary area of interest, Mr. Sample is likely to seek out sales activities that involve practical objectives and product utility. If he can contribute to his sales presentation in this way, he is more likely to feel enthusiastic about the sales process. Secondly, he is motivated by the facilitation of clients that is associated with the sales relationship, as demonstrated by his interest in People Service activities. Helping clients and prospects or providing them with services may help to energize his sales performance. Finally, his interest in Creative activities rounds out his profile of interests. It promotes a concentration in creative expression, trying novel approaches to selling, and highlighting the aesthetic appeal of a product. Although this interest area is not as crucial to overall job satisfaction as his stronger interests, it does play a role in establishing his sales style.

Notice:

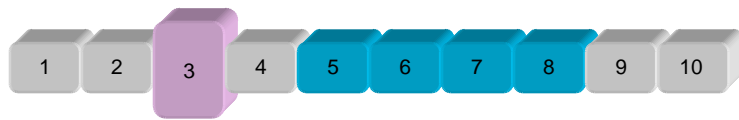
As discussed in the User's Guide for this product, this job pattern approach to matching individuals to a position provides information of great value and should be an important part of the placement decision. However, the user is reminded that the results from any assessment should never make up more than a third of the final decision.

Coaching Recommendations

John Sample scored outside the Job Match Pattern for this sales position in the following areas. When working with John Sample, you might consider the following:

THINKING

Learning Index – An index of expected learning, reasoning and problem solving potential.

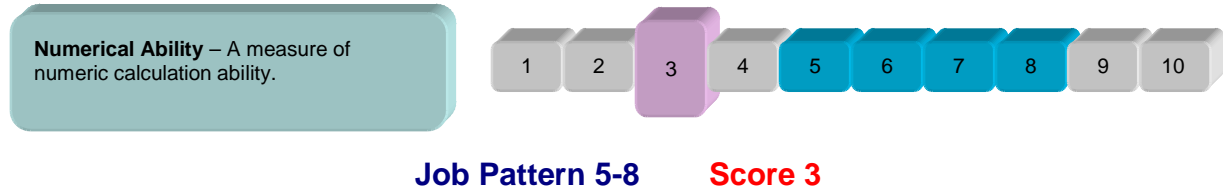


Job Pattern 5-8 **Score 3**

On the Learning Index scale, Mr. Sample scored below the Job Match Pattern for this sales position. This suggests that his capacity to assimilate new information efficiently is less than the position typically requires and that he could be overly challenged when learning new sales approaches.

- o To enhance his sales training, focus on short-term goals, so he is not overwhelmed by the entire process. Keep the information practical and avoid deviating from a highly structured learning experience.
- o In sales training sessions, John responds best to hands-on instruction. Learning in a complex environment of ambiguous goals or nonspecific tasks may be too frustrating for him.
- o He approaches sales training from a "how to" perspective, and will probably obtain very little utility from the "why" of theories. Reinforce successful development and apply learning directly to the sales techniques involved.
- o Mr. Sample may require more personal attention to achieve benefits from sales training. Focus on practical instruction that applies the training directly to the requirements of the job.

Coaching Recommendations

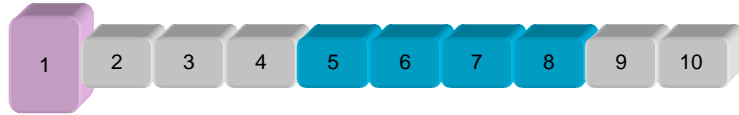


On the Numerical Ability scale, Mr. Sample is below the Job Match Pattern for this sales position. This suggests that his numeric calculation ability is less than the position typically requires and that he could have a problem with figuring data when selling. Discussions with him should determine his potential for training, otherwise the position may be overly challenging and could lead to frustration.

- o Mr. Sample requires additional time to process numerical information. Provide assistance in the form of available tools to aid in calculations when he is working with a prospect.
- o Observe his performance in calculating numerical data. Aid him, as needed, with a mentor or formalized sales training.
- o He may become frustrated by tasks involving the calculation of data. Provide sales training in appropriate mathematical areas and give consistent feedback.
- o To facilitate his development, you will need to have John trained in fundamental mathematics relevant to his selling.

Coaching Recommendations

Numeric Reasoning – Using numbers as a basis in reasoning and problem solving.



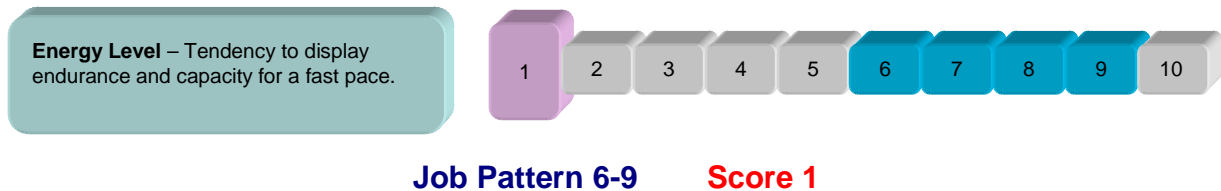
Job Pattern 5-8 **Score 1**

On the Numerical Reasoning scale, Mr. Sample is below the designated Job Match Pattern for this sales position. This suggests that his ability to analyze data as part of the decision making process is less than the position typically requires and that he could have a problem with using numbers as a basis in reasoning. Discussions with him should explore the possibility that for Mr. Sample, the position may be overly challenging.

- o John requires assistance in tasks like maintaining sales reports or assimilating information expressed as a graph. Sales-related mathematical training may be required.
- o He will require more time to evaluate numerical data. Provide assistance and training to enhance his sales performance as it relates to numerical reasoning.
- o When providing John with information on volume, quantity, finance, or other numerical information, provide additional time to allow him to process the data.
- o The assimilation of data in order to make sales decisions will create some frustration for Mr. Sample. Provide appropriate sales training to develop his potential in this position.

Coaching Recommendations

BEHAVIORAL TRAITS



On the Energy Level scale, Mr. Sample is below the Job Match Pattern for this sales position. This suggests that his sales performance could be limited by one or more of the following tendencies:

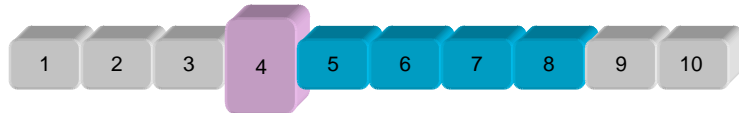
- Mr. Sample is not inclined to project a high sense of urgency concerning sales tasks and deadlines.
- Mr. Sample might not possess the energy needed to adapt to the pace of your sales environment.
- He prefers not to be pressured by critical sales deadlines.
- John demonstrates a low energy level and may require clearly defined sales priorities and deadlines, as well as some external pacing from his sales manager.

Coaching Suggestions

- He may need help gathering the energy necessary to initiate new sales projects. Maintain open communication during high stress periods and provide coaching in proven methods for handling a heavy workload.
- Discussions with him should explore the possibility that the energy level required for the position might require more initiative than John is willing to exert.
- Reward his efforts to do whatever it takes to achieve sales goals promptly by providing opportunities for planning during non-peak periods of work.
- Provide ways for him to reenergize during periods of hard work. By organizing his time, he may have time to take short breaks for gathering his motivational reserves and reflecting on short-term accomplishments, while maintaining a steady overall pace.
- Set daily sales goals for fast-paced results. Provide encouragement along the way for reinforcing a stronger level of energy.

Coaching Recommendations

Assertiveness – Tendency to take charge of people and situations. Leads more than follows.



Job Pattern 5-8

Score 4

On the Assertiveness scale, Mr. Sample scored below the Job Match Pattern for this sales position. He could find the requirements of a strong sales presence to be overly challenging. This suggests his sales performance could be limited by one or more of the following tendencies:

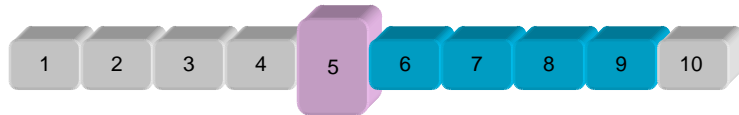
- Mr. Sample may prefer to communicate with a prospect only after having another salesperson initiate the relationship.
- He has a low need to aggressively influence a client to follow a particular course of action.
- John is slow to sell aggressively. He may also be slow to direct a prospect into a particular position, even when necessary.
- Mr. Sample tends to be understated when dealing with a forceful prospect or client.

Coaching Suggestions

- To foster assertiveness, it may be necessary to provide an example of your sales style. Make him feel a part of the team and encourage others to model the assertiveness you want him to acquire.
- Encourage his active participation in all sales projects. Listen patiently and provide feedback often to guide him toward being more assertive.
- Provide feedback and reward his involvement whenever possible. By repeating interactive exercises with clients, he may become more experienced in utilizing interpersonal skills. Advise him often concerning his progress.
- Encouraging Mr. Sample for his input in sales meetings may enhance his confidence, if applied consistently over time. Assertiveness training will be effective, if his improvement is recognized by management.

Coaching Recommendations

Sociability – Tendency to be outgoing, people-oriented and participate with others.



Job Pattern 6-9

Score 5

While Mr. Sample achieved a Sociability score comparable to most people in general, it is below the Job Match Pattern for this sales position. His orientation for working closely with others is moderately less than the position typically requires. His performance could be limited by one or more of the following tendencies:

- Mr. Sample prefers an impersonal sales style and may tend to avoid spending time on small talk and social amenities before engaging in the business at hand.
- He expresses only moderate enjoyment of sales experiences involving contact with the public, focusing rather on a style of sales service that emphasizes task resolution more than relationship building.
- Mr. Sample is somewhat motivated by sales assignments that require interpersonal contact, but prefers to accomplish sales in an impersonal fashion.

Coaching Suggestions

- To achieve an increase in his sociability, support his efforts to interact with fellow salespeople, prospects, and clients, maintaining your rewards consistently.
- In an effort to develop his social confidence and expressiveness, include John in as many sales team discussions as possible. Maintain a casual demeanor with him, encouraging a more open and relaxed way of communicating with others.
- Encourage social participation in sales meetings and make a point of initiating his involvement. As time passes, he could become more comfortable with the sales team and provide his fair share of social contributions.
- To develop his ability to interact with prospects, especially for building social relationships with clients, engage John in casual conversation often. Breaking down barriers of interpersonal distance between him and others may encourage better performance overall.

Coaching Recommendations

Decisiveness – Uses available information to make decisions quickly.



Job Pattern 7-10 **Score 3**

On the Decisiveness scale, Mr. Sample is below the designated Job Match Pattern. This suggests his sales performance could be limited by any one or more of the following tendencies:

- He has a tendency to ponder the consequences of his decisions and actions, to hesitate taking decisive action in a negotiation.
- Mr. Sample could lack a sense of urgency when making critical decisions.
- John is cautious about making decisions or closing with a prospect quickly.
- Mr. Sample is slow to act decisively when confronted with a complex sales-related decision-making situation.

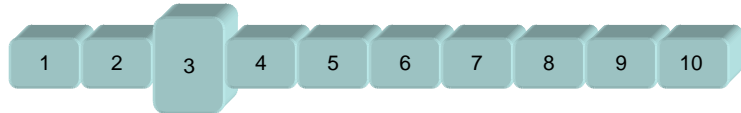
Coaching Suggestions

- Discussions with John might explore the possibility that he may be frustrated by the priority to make fast paced decision-making.
- Provide training in risk management as well as how to handle stress. This should improve the time necessary for Mr. Sample to make quick decisions.
- Encourage him by saying that we have to take risks when decisions are required in a timely manner. Build this risk acceptance by providing low risk situations, then building the potential for risk as he adapts.
- Build his enthusiasm to take action by example of your own capacity to make decisions with a sense of urgency.
- Mr. Sample tends to make decisions patiently, so emphasize the importance of deadlines and making decisions without extended analysis.

Coaching Recommendations

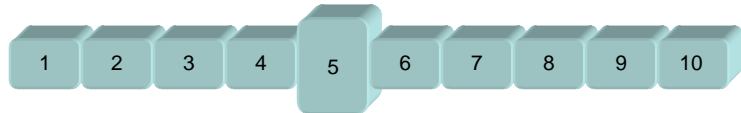
OCCUPATIONAL INTERESTS

Enterprising – Indicated interest in activities associated with persuading others and presenting plans.



Activities that involve entrepreneurial pursuits are preferred most by those who match the Job Match Pattern for this sales position. However, the activities associated with the Enterprising theme are not among his primary interest areas and may not motivate him as much.

Financial/Admin – Indicated interest in activities such as organizing information or business procedures.



Administrative duties are favored by those who match the Job Match Pattern for this sales position. However, the activities associated with the Financial/Administrative theme may not motivate Mr. Sample as much as the other salespersons. A little variety on the job that involves tasks, in addition to those of an administrative nature, would probably be more interesting to him.