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SALES MANAGEMENT REPORT

Friday, January 5, 2007

Sally Sample
Sales

This Sample Report provided by:

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*Building and Retaining
the
High-Performance
Workforce*

Introduction

The Sales Management Report for Sally Sample provides information that can be helpful in managing, motivating, and coaching Sally for increased productivity. This report reflects the responses provided by Sally Sample when she 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 Sally scored. If the enlarged segment is dark, Sally is in the Job Match pattern; if it is light, she is not. Information about Sally is reported in these five categories:

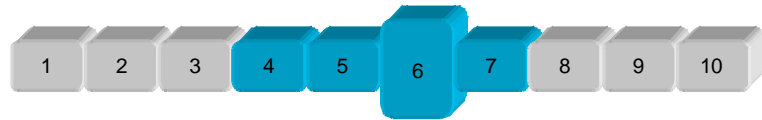
- **Profile for Thinking Style** – Learning index, Verbal Skill, Verbal Reasoning, Numerical Ability, and Numeric Reasoning.
- **Profile for Behavioral Traits** – Energy Level, Assertiveness, Sociability, Manageability, Attitude, Decisiveness, Accommodating, Independence, and Objective Judgment.
- **Profile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

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

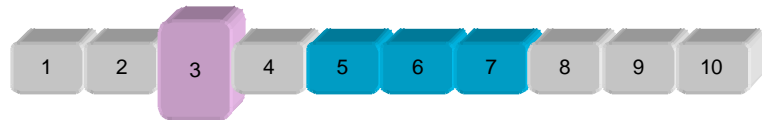
Profile for Thinking Style

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

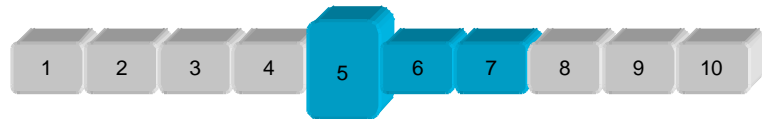
Learning Index – An index of expected learning, reasoning and problem solving potential.



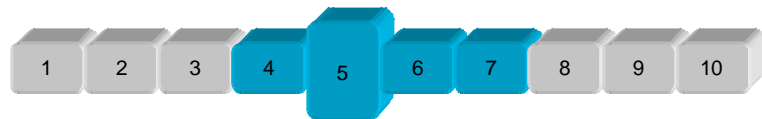
Verbal Skill – A measure of verbal skill through vocabulary.



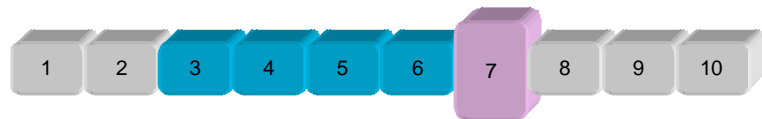
Verbal Reasoning – Using words as a basis in reasoning and problem solving.



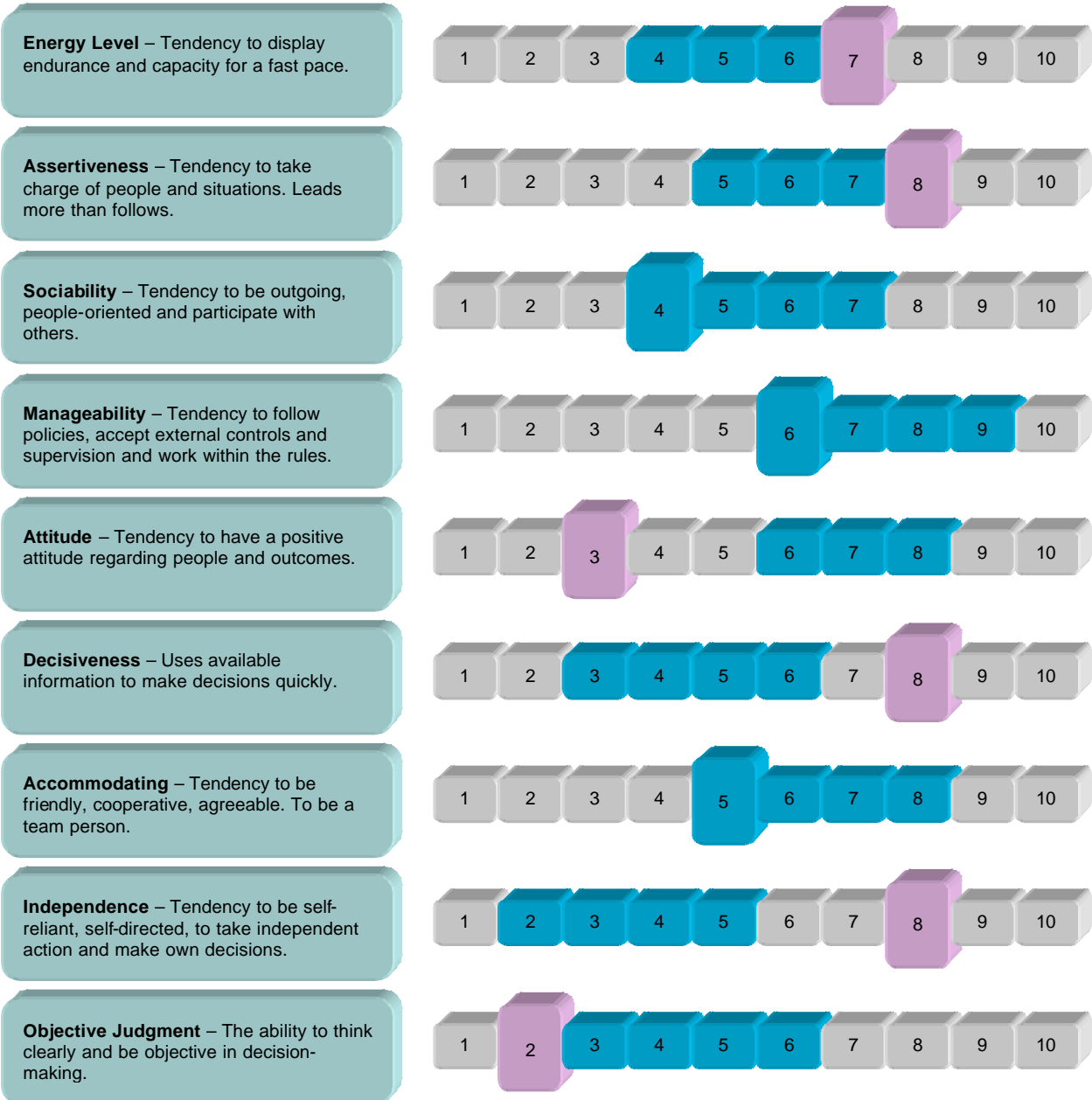
Numerical Ability – A measure of numeric calculation ability.



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



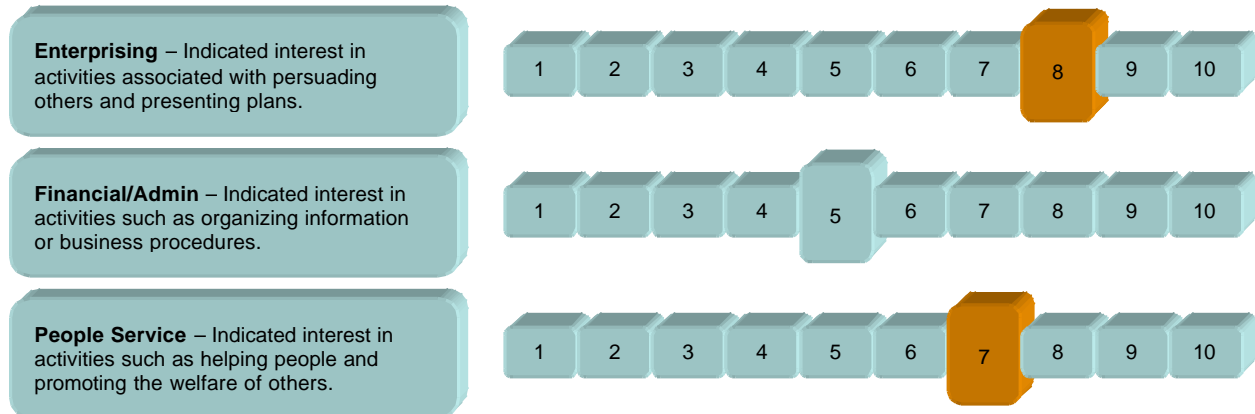
Profile for Behavioral Traits



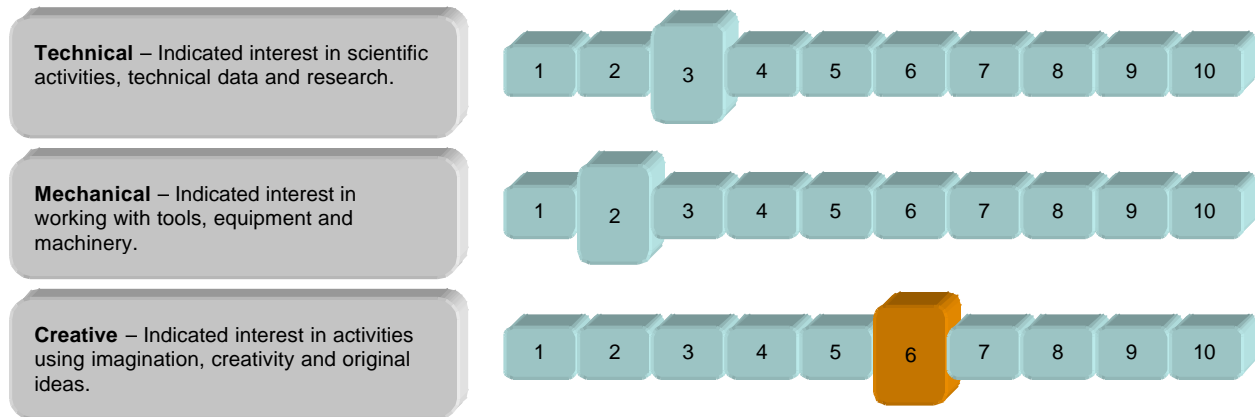
Profile for Interests

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 Sally in descending order are: **Enterprising, People Service,** and **Creative**. **Mrs. Sample shares two of these interest areas: Enterprising and People Service**

Top three Interests for this sales position



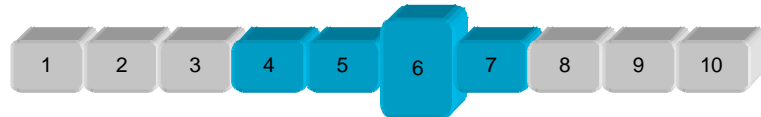
Interests not relevant to this sales position



The Total Person

Thinking Style

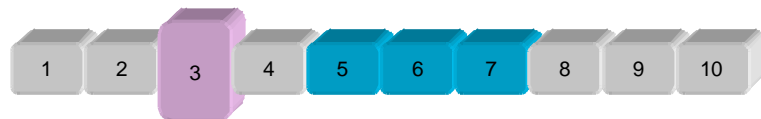
Learning Index – An index of expected learning, reasoning and problem solving potential.



Job Pattern 4-7 Score 6

- o Her overall learning index is above average and suggests a good potential for quickly learning new sales information.
- o Overall, Mrs. Sample may be expected to complete a typical sales training program with adequate success.
- o She is generally adaptive in an intellectual sense.
- o Upon completing a new sales training program, Mrs. Sample should pick up new selling concepts and techniques easily.

Verbal Skill – A measure of verbal skill through vocabulary.

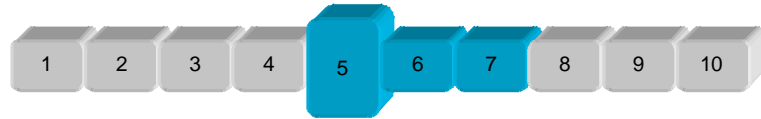


Job Pattern 5-7 Score 3

- o She demonstrates a level of verbal skill slightly below that of some people in the general population.
- o Mrs. Sample may not have had much recent opportunity to use verbal analysis and communication in selling.
- o Sally may initially need extra time in analyzing verbal and written information.
- o With training and experience, Mrs. Sample should be able to more quickly and accurately carry out communications as they apply to the job.

The Total Person

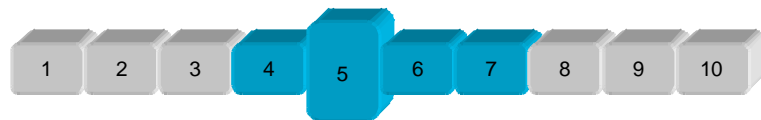
Verbal Reasoning – Using words as a basis in reasoning and problem solving.



Job Pattern 5-7 Score 5

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

Numerical Ability – A measure of numeric calculation ability.

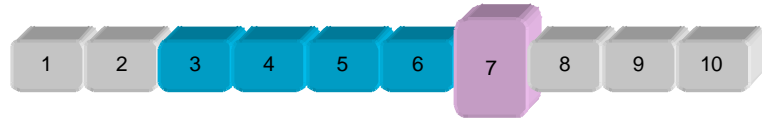


Job Pattern 4-7 Score 5

- o She needs assistance with complex mathematics or technical calculations.
- o Sally is comfortable analyzing basic numerical material and performing some mathematical functions without relying on a calculator.
- o Mrs. Sample should be capable of learning to apply basic mathematical principles to new, more complex sales problems as necessary.
- o Mrs. Sample should be able to grasp simple mathematical principles that apply to selling.

The Total Person

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

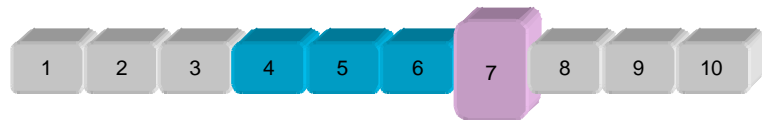


Job Pattern 3-6 **Score 7**

- o Mrs. Sample works well with numbers and numerical concepts.
- o Mrs. Sample demonstrates a strong ability to solve problems of a numerical nature.
- o She completes numerical problems with greater success than the general population.
- o Sally grasps numerical concepts readily.

Behavioral Traits

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

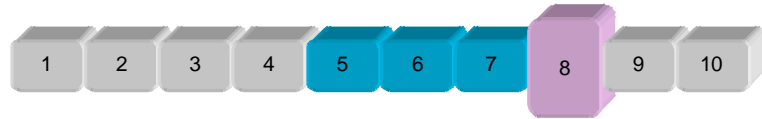


Job Pattern 4-6 **Score 7**

- o Mrs. Sample can be relied upon to complete sales assignments in a timely manner.
- o Her typical work pace should be consistently productive. On occasion, Mrs. Sample may demonstrate frustration with sedentary sales responsibilities.
- o She can act with a sense of urgency, usually even under pressure from multiple sales prospects and clients, so long as she pays attention to her energy reserves and occasionally revitalizes.
- o Mrs. Sample possesses a work pace that is responsive to deadlines and quotas. However, she may experience a drop in efficiency if her recuperative needs are ignored in this sales environment.

The Total Person

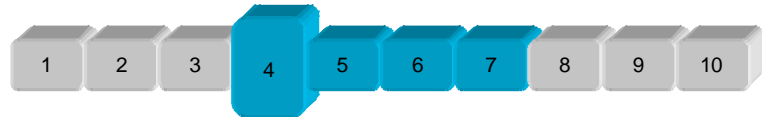
Assertiveness – Tendency to take charge of people and situations. Leads more than follows.



Job Pattern 5-7 Score 8

- o Leading a sales team and commanding the course of a negotiation is quite appealing to Mrs. Sample.
- o Mrs. Sample enjoys the opportunity to influence prospects and win sales. She is quite willing to aggressively guide a negotiation toward the desired result.
- o Mrs. Sample has a strong need to be in charge, lead others, and push for closure.
- o She is strongly motivated by influence and authority.

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

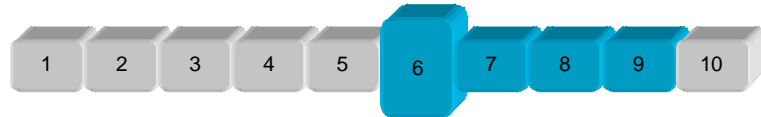


Job Pattern 4-7 Score 4

- o Her sociability is best suited for sales tasks that do not involve a great deal of socializing and relationship building.
- o Mrs. 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.
- o She expresses only moderate enjoyment of salesmanship involving contact with the public, focusing rather on a detached, task-oriented style of sales service.
- o Mrs. 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

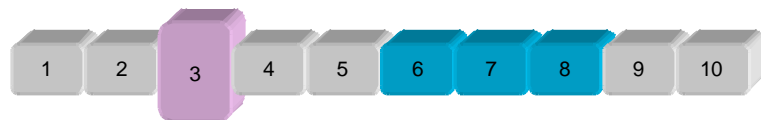
Manageability – Tendency to follow policies, accept external controls and supervision and work within the rules.



Job Pattern 6-9 Score 6

- o Sally demonstrates a fairly positive attitude concerning organizational constraints and procedures. However, when her reliance on procedure fails to deliver solutions, Mrs. Sample may try to utilize a more creative approach to selling.
- o Mrs. Sample prefers to be generally compliant and traditional. However, Sally may bend procedures when sales goals truly need a creative perspective.
- o Mrs. Sample is typically willing to accept guidance and follow procedures dictated by her sales manager. Only occasionally will she feel that procedures are too restrictive.
- o She should be willing to conform to company policies about the sales process without often feeling a loss of personal freedom.

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

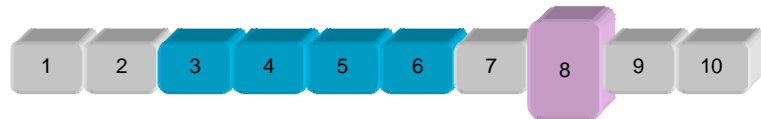


Job Pattern 6-8 Score 3

- o Sally is slow to accept the motives of those with whom she is dealing in a sales negotiation, possibly questioning the agendas of those concerned.
- o Mrs. Sample tends to take a defensive stance when negotiating a deal, rarely backing down without a critical review of the situation.
- o She is inclined to doubt the objectives of others when dealing with a negotiator.
- o Mrs. Sample is inclined to question her motives or those of others in a negotiation.

The Total Person

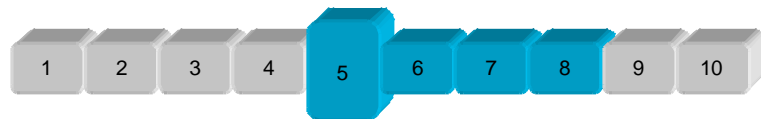
Decisiveness – Uses available information to make decisions quickly.



Job Pattern 3-6 **Score 8**

- o Sally responds quickly to client's demands, displaying a sense of urgency.
- o Mrs. Sample is readily decisive, quick to act, and prefers sales priorities that require immediate action.
- o Sally does not spend too much time analyzing a sales opportunity.
- o Mrs. Sample acts with expedience when making decisions and is not inclined to hesitate on closing a sale.

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

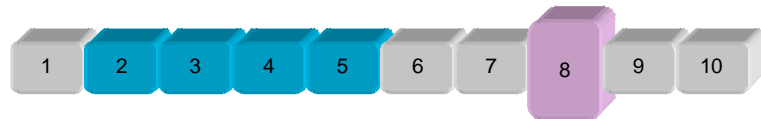


Job Pattern 5-8 **Score 5**

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

The Total Person

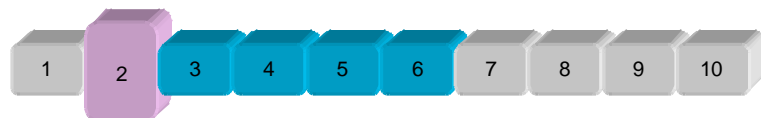
Independence – Tendency to be self-reliant, self-directed, to take independent action and make own decisions.



Job Pattern 2-5 **Score 8**

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

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



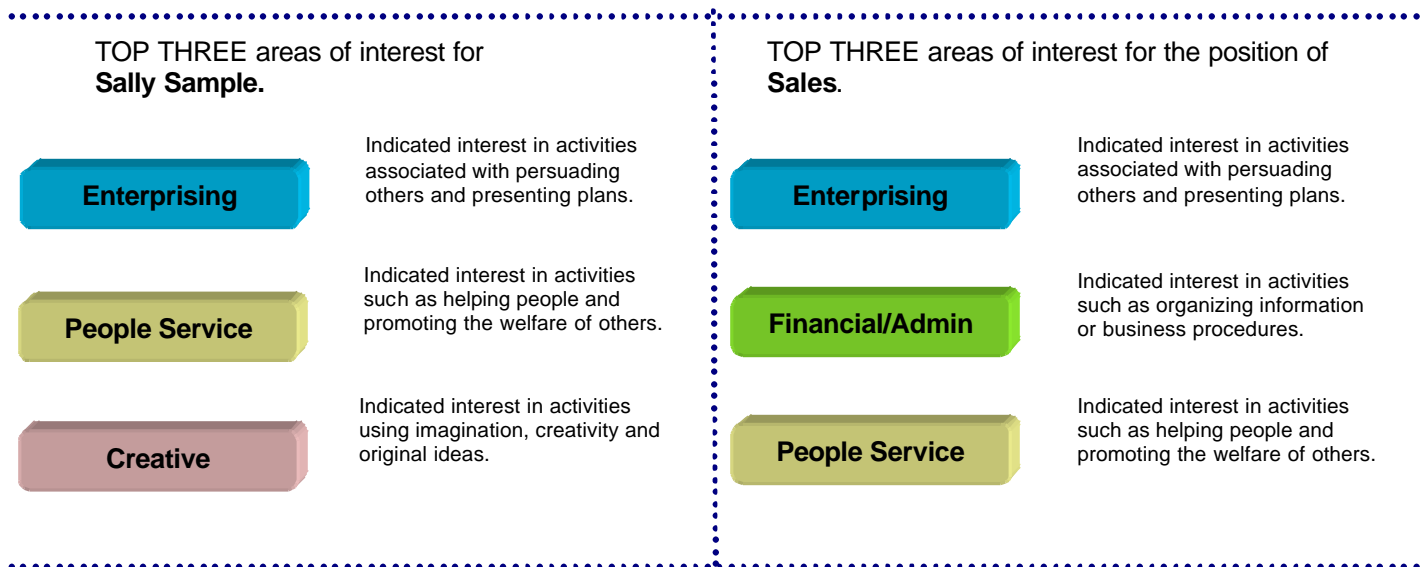
Job Pattern 3-6 **Score 2**

- o Her problem-solving emphasizes the use of intuition about sales opportunities rather than relying on sales statistics or other objective data.
- o Mrs. Sample avoids objective decision-making, following her intuition to determine a solution for a client.
- o Mrs. Sample has a tendency to be a subjective thinker, emphasizing intuition more than technical sales data.
- o Mrs. Sample is comfortable identifying sales solutions with intuition rather than hard facts and specific data for support.

The Total Person

Occupational Interests

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



Mrs. Sample scored highest in the Creative, Enterprising and People Service themes on the inventory. She is attracted to positions in which she can use her creative side in a business environment that allows for a high degree of contact with people. She appears to be drawn toward opportunities to solve problems in an innovative way. The chance to serve the needs of customers and the public in general also relates to this interest pattern.

With Enterprising as her primary area of interest, Mrs. Sample is likely to seek out activities that involve entrepreneurial pursuits and leadership. Her focus, above all other areas of interest, lies in pursuing sales objectives in a competitive environment. These kinds of activities motivate her sales style most effectively. Secondly, she is motivated by the facilitation of clients that is associated with the sales relationship, as demonstrated by her interest in People Service activities. Helping clients and prospects or providing them with services may help to energize her sales performance. Finally, her interest in Creative activities rounds out her 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 her stronger interests, it does play a role in establishing her sales style.

The Total Person

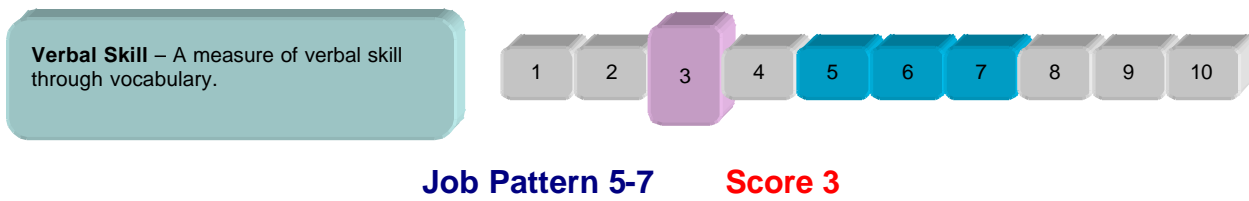
Notice:

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

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

THINKING

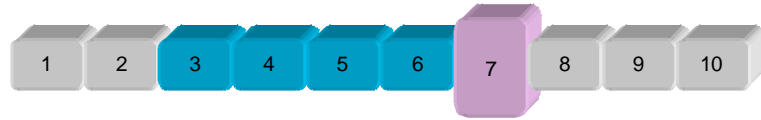


On the Verbal Skill scale, Mrs. Sample scored below the Job Match Pattern for this sales position. This suggests that her ability to use a thorough vocabulary is less than the position typically requires and that she could have a problem with communicating ideas and concepts to prospects. Discussions with her should explore the possibility that for Mrs. Sample, the position may be overly challenging and could lead to frustration and a reduction in effective, well-communicated sales.

- o When giving verbal instruction to her, do not make the communication too lengthy. Break down complex plans into individual sales goals. Have her report back to you after accomplishing one goal to receive the next one. Be very brief and straightforward.
- o Moderate the complexity of your language when communicating directives, procedures, and sales goals with Mrs. Sample, who may prefer that sales goals be stated in a concrete and applied fashion.
- o Do not become overly ambiguous and obscure when providing instructions to her, rather follow a straightforward and structured line of communication.
- o To achieve the best results from communications with Sally, review instructions after they have been given, focusing on a step-by-step understanding of the information.

Coaching Recommendations

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



Job Pattern 3-6 Score 7

On the Numerical Reasoning scale, Mrs. Sample is above the Job Match Pattern for this sales position. This suggests that her ability to analyze data as part of the decision making process is greater than the position typically requires and that she may not be sufficiently challenged to maintain her interest and/or level of performance.

- o When making budgetary decisions, Sally can rapidly see where resources may be reallocated or redistributed, but may require additional or advanced assignments to make use of this ability and avoid a lack in motivation.
- o Mrs. Sample is very capable of assimilating numerical data to make sales decisions, but may be frustrated by a lack of challenge in this sales position. Address frustrations and provide ways to challenge her abilities.
- o To avoid miscommunications when Sally is expressing complex numerical information to prospects, encourage her to utilize proper communication techniques that emphasize a common level of understanding between the client and herself.
- o Mrs. Sample may be far more proficient in processing numerical information than is required for this sales position. She may experience frustration if not sufficiently challenged, but if little opportunity exists to practice this skill, then focusing on her motivational level may be appropriate.

Coaching Recommendations

BEHAVIORAL TRAITS



On the Energy Level scale, Mrs. Sample is above the Job Match Pattern for this sales position. Her focus may be lower than the position typically requires. As a result, she is likely to show one or more of the following tendencies:

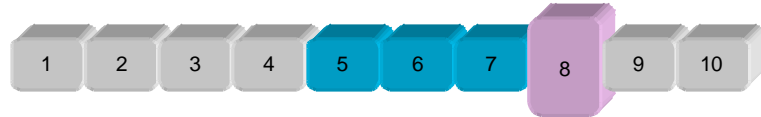
- o She would very likely avoid sales positions that call for a sedentary, low-stress work pace.
- o Mrs. Sample can become easily bored if not sufficiently stimulated by her workload.
- o Mrs. Sample has an unusually high energy level and probably would not enjoy working behind a desk as much as the excitement of a fast-paced sales environment.

Coaching Suggestions

- o Discussions with her should explore the possibility that this sales position may not satisfy her high level of energy and drive.
- o Create additional assignments that will enhance the productivity of her sales and provide a focus for her high energy level; communicate with her often to maintain your awareness of her job satisfaction.
- o Communicate with her about ways to make productive use of her high energy level; this will help her avoid the boredom which can lead to a decrease in productivity.
- o If the pace of this sales position is too slow for her, reward her efforts to attend to the essentials with time to “let off a little steam.” This kind of person is motivated to be very productive; make use of this energy to instigate productive selling on her part.
- o Provide a workload that fulfills her need for activity and make opportunities available for her to participate in new and productive projects that benefit both her and the goals of her department.

Coaching Recommendations

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



Job Pattern 5-7 Score 8

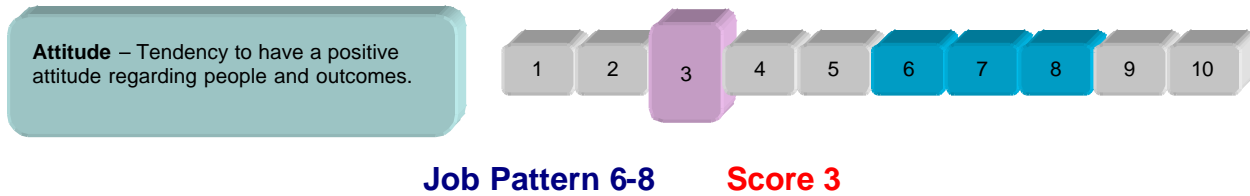
Mrs. Sample scored above the Job Match pattern for this sales position on the Assertiveness scale. She may find aspects of this position overly challenging when deciding how much control is appropriately taken over others. This suggests her performance could be limited by one or more of the following tendencies:

- o She is strongly inclined to demonstrate power and authority when a more subtle approach is called for.
- o Sally is less motivated by situations in which she must achieve results through negotiation and compromise.
- o Mrs. Sample may become frustrated easily by sharing leadership with others.
- o Mrs. Sample has a strong tendency to dominate a sales negotiation with minimal concern for accepting compromises.

Coaching Suggestions

- o If demonstrating an assertive sales style is a challenge for her, training that focuses on control issues may reveal a way for her to allow others a certain amount of control.
- o To supplement her sales and negotiation potential, give Mrs. Sample the opportunity to share goals with others.
- o While talking with Sally, determine her ability to practice greater diplomacy when negotiating sales.
- o Encourage her participation as a peer within the group and foster the willingness to be accepting of the opinions, needs and influence of others. Training in active listening may enhance her ability to negotiate with clients.
- o If her sales style is too forceful for prospects, a sales manager may act as a role model, demonstrating an authoritative yet democratic interpersonal style. Provide feedback concerning the effectiveness of your preferred sales style.

Coaching Recommendations



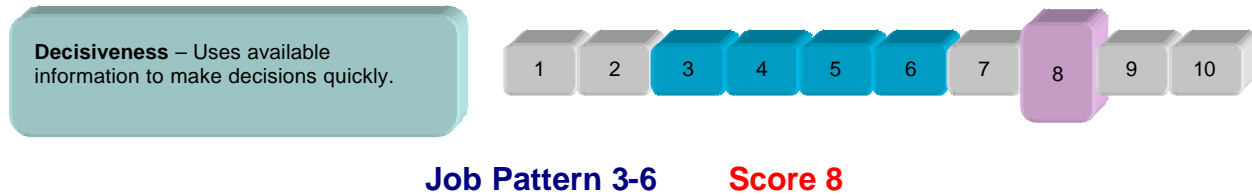
On the Attitude scale, Mrs. Sample is below the Job Match Pattern for this sales position. Her general response to others will be more guarded, compared to most salespeople in this position. This suggests that her sales performance could be limited by one or more of the following tendencies:

- o Mrs. Sample is inclined to question the motives of others in a negotiation.
- o Sally is slow to accept the motives of those with whom she is dealing in a sales negotiation. She may even openly question the agendas of those concerned.
- o Mrs. Sample tends to take a defensive stance when negotiating a deal, rarely taking the word of negotiators at face value.

Coaching Suggestions

- o Building her basic trust with informal group activities can ease her doubts about the motivations of others. These activities can be as simple as lunchtime office meetings and informal sales goal meetings.
- o Discussions with her should explore the possibility that this sales position may require a level of trust from her that requires adaptation and training to develop.
- o Provide her with an appropriate amount of time to discuss her feelings about a change process, but redirect her by providing a calm and cooperative expression in your behavior. Stress the necessity to focus on immediate sales goals.
- o While maintaining a considerate demeanor, a sales manager could confront her on alternative solutions concerning her apparent low level of interpersonal trust and how she may contribute to sales successes.
- o If Mrs. Sample begins to hesitate about accepting change, suggest discussion for a later time in order to redirect some of her distress. Give feedback on her performance to make positive steps toward more productive behavior.

Coaching Recommendations



On the Decisiveness scale, Mrs. Sample is above the designated Job Match Pattern for this position. As a result, her net effectiveness as a salesperson could be hampered by any one or more of the following tendencies:

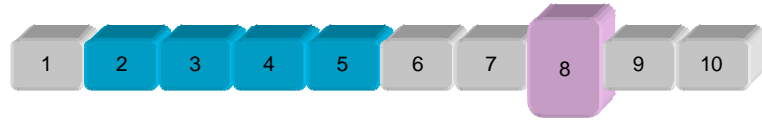
- o Sally is inclined to rush her decisions, to allow her sense of urgency to unduly influence her critical decision-making processes.
- o She may come to a decision without a thorough understanding of the related details.
- o Mrs. Sample is inclined to become quickly impatient and frustrated by prospects who are cautious when reaching a buying decision.
- o Sally tends to make sales decisions with minimal preparation, and may not be inclined to think through the long-range consequences, once a decision is made.

Coaching Suggestions

- o Stress the importance of caution to Mrs. Sample in order to avoid risk in decision-making. Stress that the importance of deadlines is often outweighed by the level of consequence inherent with making uninformed decisions.
- o Discussions with her should determine the extent of her spontaneity in decision-making, and that the consistency of her effectiveness could be enhanced by more deliberation.
- o It is important that the concept of patience in decision-making be stressed to Mrs. Sample. Ask for deliberate and analytical processes in her decisions.
- o Sally may appear too spontaneous in her decision-making. Counsel her on the necessity to avoid unnecessary risk with cautious and deliberate decisions.
- o Mrs. Sample requires training in how to be more deliberate in decision-making. Emphasize the importance of analyzing information more thoroughly so that each decision can be more objective.

Coaching Recommendations

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



Job Pattern 2-5 Score 8

On the Independence scale, Mrs. Sample is above the Job Match Pattern for this sales position. Her self-reliance is greater than the position typically requires and she may become frustrated by the level of supervisory attention typical of this sales role. Her performance could be limited by one or more of the following tendencies:

- o Sally is a highly independent salesperson who prefers minimal guidance and coaching. Her high level of independence may create frustrations for an exceptionally intrusive sales manager.
- o She is highly independent, possibly requiring constant redirection in a sales environment that does not encourage this much autonomy.
- o Mrs. Sample prefers to pursue prospects on her own and will resist what she perceives as micro-management. She can become impatient with a sales manager or executive that demands constant progress updates.
- o Mrs. Sample would rather undertake sales projects independently, seeking support only when absolutely necessary to complete the deal.

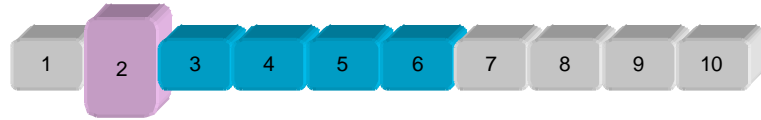
Coaching Recommendations

Coaching Suggestions

- o Discussions with Sally should explore the possibility that this sales position may frustrate her independence and lead to a lowered sense of autonomy and freedom.
- o When possible, allow Mrs. Sample some breathing room to let off the pressure she experiences from supervisory attention. Remain authoritative without becoming authoritarian so that she may adapt more readily, focusing more on salesmanship than her ability to appreciate your office traditions.
- o Reinforce her acceptance of a structured sales environment. Reward her efforts to concede to this structure by allowing some independence in areas of lesser concern.
- o Maintain open communication with her to foster a closer supervisory relationship. Listen to her when she appears frustrated by the attentions of a supervisor and recognize her positive performance.
- o Handle with care when collaboration and structure are required, but remain authoritative. Encourage a consultative relationship when her independence is contrary to the organization's sales objectives.

Coaching Recommendations

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



Job Pattern 3-6 Score 2

On the Judgment scale, Mrs. Sample is below the Job Match Pattern for this sales position. Her decision-making process is less objective than the position typically requires. Her performance could be limited by one or more of the following tendencies:

- o Her problem-solving emphasizes following hunches about sales opportunities rather than relying on sales statistics or other objective data.
- o Mrs. Sample prefers to identify sales solutions with intuition rather than hard facts and specific data for support.
- o Mrs. Sample has a tendency to be a subjective thinker, to emphasize personal opinions more than technical sales data.

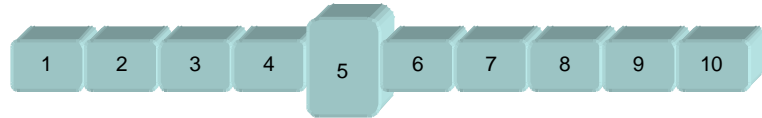
Coaching Suggestions

- o Coach Sally on how to be more objective when solving problems. Training should emphasize a step-by-step process of logical reasoning.
- o Coach her on the investigation of a greater variety of information sources. Emphasize dealing with facts and other objective data before making any assumptions about a selling situation.
- o Encourage her to avoid making assumptions and to be more thorough in gathering appropriate information in order to make a more informed plan of action.
- o Discuss with Mrs. Sample her subjective problem-solving style, guiding her to avoid following hunches and focus on more objective thinking in the future.

Coaching Recommendations

OCCUPATIONAL INTERESTS

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 Mrs. 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 her.