

**Sam Sample**  
**09 Jun 2020**

**DECISION MAKER**

**SALES ROLES**

**SOLUTIONS  
DEVELOPMENT**



## GUIDE TO USING THIS REPORT

### INTRODUCTION

The sales function is the lifeblood of most organisations. It can exponentially grow revenue and cement a business' success. Studies have consistently shown that the calibre of the sales force is directly related to sales success and organisational growth. Fortunately, sales effectiveness is a skill that can be identified and developed. The sales questionnaire assesses a range of personality and motivational characteristics that represent a tendency towards effective sales behaviour.

This report uses Sam's profile results to investigate the likelihood she may exhibit certain types of sales related behaviour. This particular report is intended as a tool to facilitate her personal development, rather than as an assessment tool, it can be used as a starting point either:

- To explore possible development needs with her, and produce a shared development strategy for promoting her competence in those dimensions that are work relevant, or
- To consider reasons for any possible discrepancies between her predicted behaviour and her actual performance as assessed by peer ratings, performance appraisals, etc.

### REPORT SECTIONS

The "Development" report presents Sam's profile results in the following sections:

#### Sales Process Overview

Provides a summary of Sam's results against the sales process. This section also highlights Sam's potential strengths and areas of potential risk within the sales process phases.

#### Development Planning

Provides more detailed information regarding Sam's performance on each of the profile's dimensions. The section also provides development recommendations and a framework for creating a development plan.

#### Sales Culture Fit Overview

Provides a summary of Sam's fit to different types of roles or work environments.

### DISCLAIMER

This assessment is only an indicator. Therefore, it is recommended that decisions on recruitment, promotion, career guidance and development are made in conjunction with other relevant information and not solely on the information in this report. The authors and distributors accept no responsibility for decisions made using this tool and cannot be held directly or indirectly liable for the consequences of those decisions.



## CONTEXT

The profile arises from a personality questionnaire. It must be interpreted in the context of other relevant factors such as experience, training, and wider skills. For example, Sam's past performance can be assessed through a critical review of references, her work history and previous qualifications, and via a structured interview. Her level of job specific knowledge can be assessed via the use of work sample tests and simulations, and behavioural interviews. Finally, her skills can be assessed in greater detail through behavioural observation, role-plays and assessment centre exercises. The profile should also be considered in light of the organisation's sales process and culture.

## DIMENSIONS

The behaviours/dimensions used in the questionnaire are derived from a typical sales process framework. This particular model was selected to provide a clear picture of respondents' capabilities within a framework familiar to most sales professionals and trainers.

### SALES PROCESS PHASES

#### Building Contacts (Prospecting)

Investigates the individual's capacity to build contacts. It includes the following dimensions:

- **Looks for opportunities** - Seeking opportunities and taking advantage of them.
- **Outgoing and engages others** - Approaching others and initiating contact in order to build a network of sales contacts and leads.
- **Builds close personal relationships** - Building close personal relationships with clients.

#### Needs Assessment (Qualifying)

Investigates the individual's capacity to assess customer needs. It includes the following dimensions:

- **Seeks to understand needs** - Attentiveness to the needs of his clients when qualifying leads.
- **Seeks to find value** - Creating value by linking clients' needs to relevant products and services.
- **Qualifies opportunities** - Categorising leads according to practical sales outcomes and identify when to disqualify leads which are not likely to yield results.

#### Style and Presentation (Pitching)

Investigates the individual's capacity to present ideas and concepts to others. It includes the following dimensions:

- **Social presence** - Gaining and holding the attention of others.
- **Persuasive** - Persuading and convincing others of his/her point of view.
- **Adaptive and conforming** - Adaptive selling style to closely fit sales situations and buyer expectations.

#### Negotiation (Closing)

Investigates the individual's capacity to negotiate with customers and close sales. It includes the following dimensions:

- **Assertive** - Moving sales situations forward without being aggressive or coercive.
- **Conflict handling** - Dealing with customer objections in a professional and constructive manner.
- **Diligent and persevering** - Pursuing sales until all avenues have been explored and exhausted.

#### Follow-up (Supporting)

Investigates the individual's capacity to follow-up on the sale after closure. It includes the following dimensions:

- **Service and support** - Showing dedication to customer satisfaction and providing after-sales support to customers.
- **Process oriented** - Working with sales processes and procedures, completing sales related paperwork and tracking sales results.
- **Stress management** - Overcoming difficulties and facing challenges with confidence and optimism.



In addition to describing Sam's likelihood to perform against the sales process model, the report also provides insights into the types of roles or environments she is more likely to be comfortable working in.

## SALES CULTURE CONDITIONS

Roles which require salespeople to work under pressure

Roles which require salespeople to exercise diplomacy

Roles which require salespeople to address the public and give presentations

Roles which require salespeople to work with each other

Roles which require salespeople to work in a competitive environment

Roles which require salespeople to work long hours

Roles which require salespeople to maintain high standards

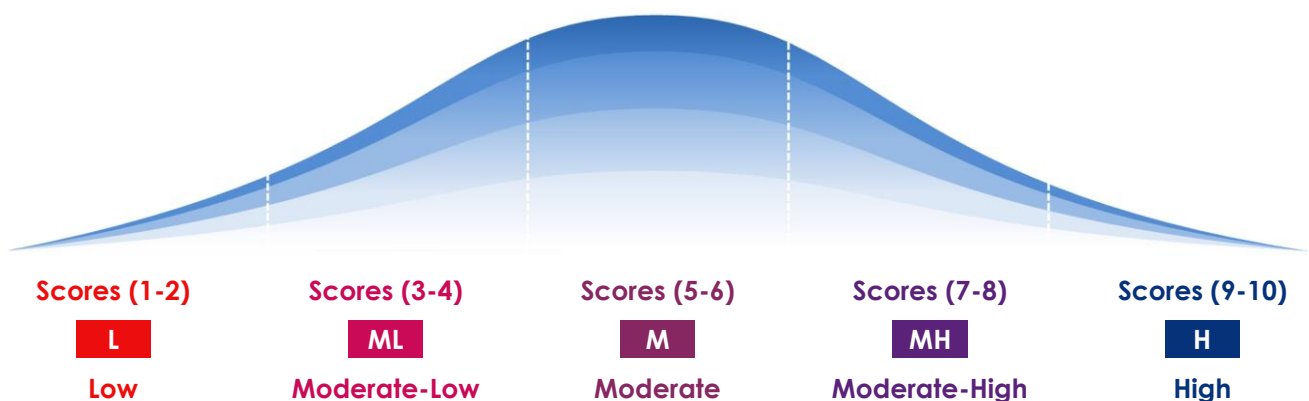
Roles which require salespeople to work under constantly changing conditions

Roles which provide salespeople with financial rewards and incentives

## RESULTS SCALE

A reference group is used to evaluate Sam's results and determine her tendency to exhibit effective sales behaviours in the workplace compared to others. Her results are presented as standardised scores on a scale of 1 to 10.

The following chart represents a distribution of individuals on a particular scale, where high scores represent greater tendency to behave in a particular manner and low scores represent a reduced likelihood of behaving in a particular manner. An overall level ranging from a "Low" to a "High" tendency is provided to help highlight areas of concern.



## REFERENCE GROUPS USED

Personality Dimensions: 481 Professionals and Managers

## RESPONSE STYLE

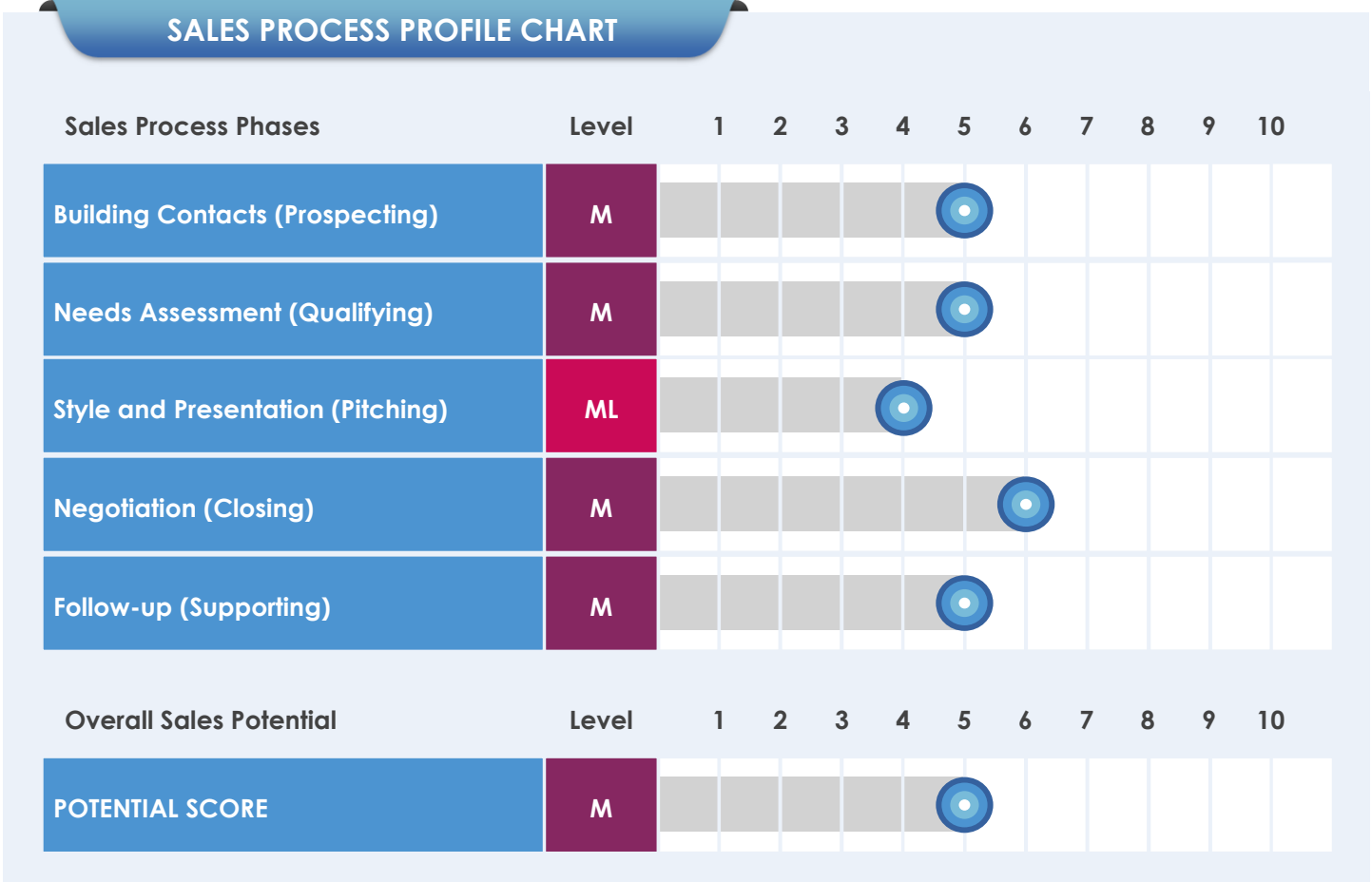
The pattern of responses Sam obtained on the assessment indicates that she is unlikely to have been biased by any desire to present herself in an unrealistically favourable light.





# SALES PROCESS OVERVIEW

The overall sales potential score estimates Sam's tendency to exhibit effective sales behaviours in the workplace. It reflects a combination of personality and motivational characteristics related to sales performance within the various phases of the sales process.





## PROFILE HIGHLIGHTS

The following tables list the major strengths and potential areas of concern that can be inferred from Sam's responses to the questionnaire. Further details are available in the Development Planning Section.

### POTENTIAL STRENGTHS

- She is a little more likely than most to seek to create value by linking her clients' needs to relevant products and services.
- Sam is as likely as most to work towards closing sales and work to overcome challenges with great confidence and optimism.
- She is less likely than most to become particularly irritable when faced with difficult targets and is expected to face challenges with confidence and optimism.

### POTENTIAL RISKS

- Sam is more likely than most to avoid wasting her time on leads which she does not believe are likely to yield results. However, she may not rely on objective criteria when attempting to qualify or disqualify leads.
- While she is as inclined as most to adapt her style, she may not always conduct herself in a diplomatic and tactful manner and is at greater risk than most to inadvertently say things which others might find offensive or consider to be odd or out of place.
- Sam may be disinclined to complete sales related paperwork and she is unlikely to track the progress of sales.



## DEVELOPMENT PLANNING

This section provides respondents with the opportunity for self-reflection and self-development. Work with Sam to define development goals based on the results of the profile.

### Suggested development process:

1. Feedback and reactions
2. Selecting areas for development
3. Development plan

A detailed description of Sam's most likely behaviour on each of the sales process dimensions is provided in this section along with development recommendations. Please review these before working with her on the development plan.



**M DEVELOPMENT GUIDE: BUILDING CONTACTS (PROSPECTING)****ML A. Looks for opportunities** - Seeking opportunities and taking advantage of them.**Profile Description**

- The pattern of results Sam obtained on the assessment suggests that while she is as driven as most people towards achievement, she is more cautious and retrained than most. As a result, she is less likely than most to seek opportunities and take advantage of them as they arise.

**Development Recommendations**

- Prospecting can be one of the most difficult activities of the sales process. Sam may require motivation and encouragement to help her recognise opportunities and take advantage of them. Discuss possible implications and solutions with Sam. However, since this is primarily a motivational issue which cannot be remedied through standard training or development initiatives, Sam may need further support when conducting prospecting activities. Help her stay motivated by creating a plan that outlines clear goals and objectives and implement an action plan for achieving them. This provides a sense of purpose that can keep sales representatives going during times of low motivation.

**ML B. Outgoing and engages others** - The ability to approach others and initiate contact.**Profile Description**

- Having obtained a pattern of results that indicates that she is as outgoing and socially bold as most people, Sam is as likely as most to engage with potential clients, though she may not always be the one to initiate contact. In addition to this she should be as capable as most of dealing with rejection, which should make her as suited as most to selling to cold prospects.

**Development Recommendations**

- Help Sam develop her social self-confidence and her courage to initiate conversations with strangers. This can be done through practice role plays or coaching her during outbound sales calls. While role plays and coaching may be effective long-term solutions, try providing her with introductory spiels or scripts to help her overcome the challenge of not knowing what to say or how to say it.

**M C. Builds close personal relationships** - Building close personal relationships with clients.**Profile Description**

- Her profile indicates that she is as likely as most to project a friendly and personable nature and to show concern for others. Consequently, Sam is likely to be as good as most at building close personal relationships with clients. In addition to this, others are likely to recognise her friendly nature and are likely to warm to her reasonably quickly.

**Development Recommendations**

- No development recommendations could be derived from Sam's profile on this dimension.



## M DEVELOPMENT GUIDE: NEEDS ASSESSMENT (QUALIFYING)

### M A. Seeks to understand needs - The ability to be attentive to the needs of her clients when qualifying leads.

#### Profile Description

- Sam's responses on the questionnaire indicate that she has as much of an interest in others as most people. As a result, she is likely to be as attentive as most to the needs of her clients when qualifying leads.

#### Development Recommendations

- No development recommendations could be derived from Sam's profile on this dimension.

### MH B. Seeks to find value - Creating value by linking clients' needs to relevant products and services.

#### Profile Description

- Having a profile which indicates that she is more materialistic than many people, Sam is a little more likely than most to seek to create value by linking her clients' needs to relevant products and services.

#### Development Recommendations

- No development recommendations could be derived from Sam's profile on this dimension.

### ML C. Qualifies opportunities - The ability to categorise leads according to practical sales outcomes.

#### Profile Description

- Sam's results suggest that she is more likely than most to adopt a calculating and Machiavellian approach to qualifying her leads, whereby she is more likely than most to avoid wasting her time on leads which she does not believe are likely to yield results. However, her profile also indicates that she is likely to be quite impractical. As a result, she may not rely on objective criteria when attempting to qualify or disqualify leads.

#### Development Recommendations

- Train Sam on categorising her leads according to practical sales outcomes such as impact, urgency, willingness to act and ability to act. By utilising this approach to qualifying leads, Sam can focus her resources on the leads with most potential.

**ML DEVELOPMENT GUIDE: STYLE AND PRESENTATION (PITCHING)****ML A. Social presence** - Gaining and holding the attention of others.**Profile Description**

- The results of the questionnaire indicate that Sam is likely to be seen by others as being as confident and self-assured as most people in social settings. Having said this, her profile also indicates that she is likely to project a relatively sober and serious outlook. Consequently, she is as likely as most to gain and hold the attention of others, though may not have as strong a social presence as some.

**Development Recommendations**

- Sam would likely benefit from training in presentation skills. You can also work with her on developing her ability to grab and hold the attention of her audience.

**M B. Persuasive** - The ability to be a persuasive speaker and convincing others of her point of view.**Profile Description**

- Sam's profile suggests that she is as likely as most to enjoy convincing others of her point of view. As a result, she is likely to be as persuasive a speaker as most, though she may not actively engage others or pursue them in order to win them over.

**Development Recommendations**

- No development recommendations could be derived from Sam's profile on this dimension.

**ML C. Adaptive and conforming** - The ability to adapt her selling style to closely fit buyer expectations.**Profile Description**

- Her profile indicates that while she is as inclined as most to adapt her style according to her audiences' expectations, she may not be sensitive to the nuances of social settings. As a result, Sam may not always conduct herself in a diplomatic and tactful manner and is at greater risk than most to inadvertently say things which others might find offensive or consider to be odd or out of place.

**Development Recommendations**

- Adaptive selling involves altering sales behaviours based on information about the nature of the selling situation. Sam is likely to benefit from training which concentrates on reading customer cues in order to respond accordingly.



## M DEVELOPMENT GUIDE: NEGOTIATION (CLOSING)

### ML A. Assertive - Moving sales situations forward without being aggressive or coercive.

#### Profile Description

- Inclined to be very assertive and relatively competitive, Sam is likely to be keen to move sales situations forward and close deals. Having said this, she may be prone to using aggressive sales tactics to push clients into agreeing with her. Consequently, this style may intimidate some clients and turn them away.

#### Development Recommendations

- Professional sales people know how to guide the sales pitch towards closure without being overly forceful or aggressive. Encourage Sam to review her sales behaviour to ensure she does not come across to clients as being overly aggressive. In addition to this, offer Sam sales training that is aimed at accurately reading and taking advantage of sales/buying cues.

### M B. Conflict handling - Dealing with customer objections in a professional and constructive manner.

#### Profile Description

- The results Sam obtained on the assessment indicate that she may not be as tactful or diplomatic as most and may not always deal with conflict in a constructive manner. Having said this, she is, by nature, likely to be relatively calm and collected. As a consequence, she is as likely as most to be patient when dealing with customer objections.

#### Development Recommendations

- Support Sam to respond with tact and diplomacy in high pressure conflict situations. There are many skills and techniques that can help manage conflict. Such skills and techniques are often taught as part of communication, conflict resolution or even customer service skills training courses. Coaching Sam on how to effectively deal with conflict and conducting role plays with "difficult" customers can also be of benefit.

### MH C. Diligent and persevering - The ability to pursue a sale until all avenues have been exhausted.

#### Profile Description

- Inclined to be quite resilient and as achievement orientated as most, Sam is as likely as most to work towards closing sales and work to overcome challenges with great confidence and optimism. Consequently, she is unlikely to give up on a sale until most avenues have been explored and exhausted.

#### Development Recommendations

- No development recommendations could be derived from Sam's profile on this dimension.



## M DEVELOPMENT GUIDE: FOLLOW-UP (SUPPORTING)

### M A. Service and support - The ability to show dedication to customer satisfaction.

#### Profile Description

- Sam's responses to the questionnaire indicate that she is as likely as most to provide after-sales support to customers in order to ensure they are satisfied with the products or services provided.

#### Development Recommendations

- No development recommendations could be derived from Sam's profile on this dimension.

### L B. Process oriented - The ability to work with sales processes and procedures and track sales results.

#### Profile Description

- Her responses to the questionnaire suggest that she is likely to be very spontaneous and may not believe it is important to follow processes and procedures. As a consequence, she may be disinclined to complete sales related paperwork and she is unlikely to track the progress of sales.

#### Development Recommendations

- Sales people are unlikely to comply with sales procedures if they feel the procedures clash with their sales objectives and targets. Establish that procedures do not hinder sales objectives before investing in any training or development interventions. Finally, while training helps to generate awareness and buy-in, re-enforcement is often needed to increase the odds that the procedures will be regularly followed.

### MH C. Stress management - The ability to face challenges with confidence and optimism.

#### Profile Description

- Her profile indicates that she is likely to be fairly relaxed and composed. As a consequence, she is less likely than most to become particularly irritable if things go wrong or when faced with difficult targets. As her results further suggest that she has a strong belief in her ability to overcome difficulties, she is expected to face challenges with confidence and optimism.

#### Development Recommendations

- No development recommendations could be derived from Sam's profile on this dimension.



## 1. FEEDBACK AND REACTIONS

Gauging Sam's reaction to the profile is essential to the interpretation of the results and is useful in determining a development plan. A copy of the "Feedback" report can be shared with Sam before discussing the results with her. Use the following questions to gauge her overall reaction to the feedback.

**What** did you learn from the results?

**How** did your perceptions of your sales style compare to those of the profile?

**What** areas did you agree with the most?

**What** areas did you disagree with the most?



## 2. SELECTING AREAS FOR DEVELOPMENT

Discuss with Sam which areas she would like to focus on for development after having reviewed the report's findings. Use this page as the basis for all agreed development plans.

**This development plans is for:**

**This development plans is overseen by:**

<b>Name</b>	Sam Sample	
<b>Position</b>		
<b>Signature</b>		
<b>Date</b>		

The table below summarises the dimensions used in sales process framework. The areas which have been determined as most in "Need" for development from the profile have been marked with a check mark under the "Need" column, though users may also select other areas which they deem to be in need for development.

Sales Process Phase	Dimension	Need	Priority
Prospecting	Looks for opportunities	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Outgoing and engages others	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Builds close personal relationships	<input type="checkbox"/>	<input type="checkbox"/>
Qualifying	Seeks to understand needs	<input type="checkbox"/>	<input type="checkbox"/>
	Seeks to find value	<input type="checkbox"/>	<input type="checkbox"/>
	Qualifies opportunities	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Pitching	Social presence	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Persuasive	<input type="checkbox"/>	<input type="checkbox"/>
	Adaptive and conforming	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Closing	Assertive	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Conflict handling	<input type="checkbox"/>	<input type="checkbox"/>
	Diligent and persevering	<input type="checkbox"/>	<input type="checkbox"/>
Supporting	Service and support	<input type="checkbox"/>	<input type="checkbox"/>
	Process oriented	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Stress management	<input type="checkbox"/>	<input type="checkbox"/>

Dimensions selected as being in "Need" of development and which have also been selected as a "Priority" should be considered as part of Sam's development plan.



### 3. DEVELOPMENT PLAN

Please consider the following points in order to gain as much benefit from the development plan:

- Focus on the dimensions identified for development from the previous page.
- The development guides provide general recommendations for development. Use the development recommendations to help determine which development activities to pursue.
- Keep the objectives simple and measurable.
- Define how to monitor and evaluate progress.
- Use the provided form to put the plans in writing.
- Monitor Sam's progress through regular review meetings.

**What** areas do you wish to develop?

**Why** is it important or necessary to develop these areas?

**How** will you go about developing these areas?

**Who** do you need support from in order to achieve your development objectives?

**When** do you wish to achieve the desired development?

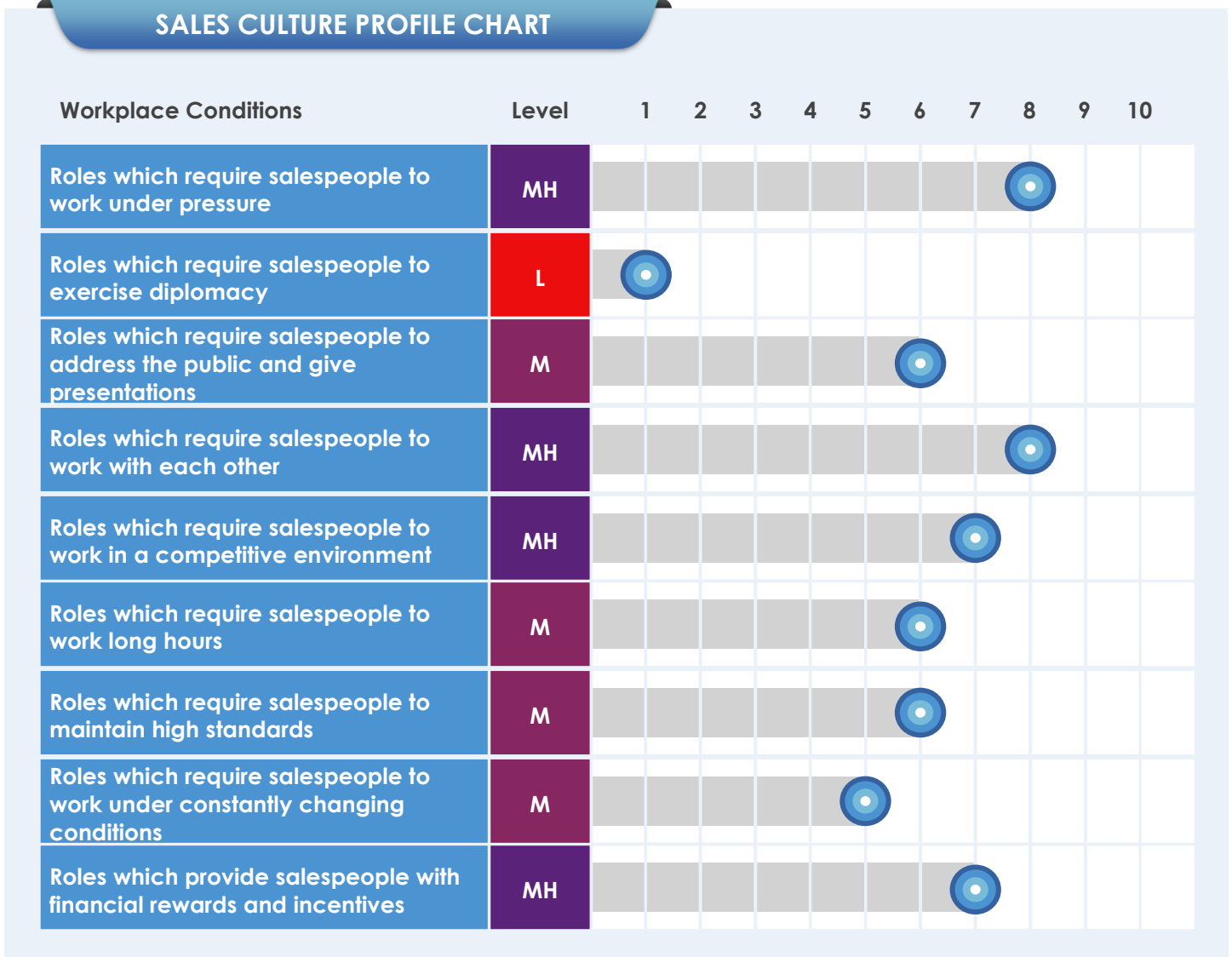




# SALES CULTURE FIT OVERVIEW

The culture fit scores estimate Sam's preference to work under certain workplace conditions. Not all the conditions provided are relevant to all organisations, which is why it is recommended to identify which conditions best fit the culture of the organisation before exploring Sam's specific workplace preferences.

The results of the culture fit profile can help determine the types of motivators and environments that stimulate Sam and which, in turn, can help her perform at her best.





## SALES CULTURE PROFILE DESCRIPTIONS

### MH Roles which require salespeople to work under pressure

Sam's results suggest that she is likely to function better than most in a pressured environment in which tight deadlines have to be met and demanding targets are routinely set. She would be expected to greatly enjoy working in settings that present her with a considerable number of challenges to overcome and problems to resolve. It is likely she will approach such challenges in a very positive and optimistic manner.

### L Roles which require salespeople to exercise diplomacy

She is unlikely to be suited to settings which demand tact and diplomacy.

### M Roles which require salespeople to address the public and give presentations

She would be expected to be as comfortable as most in roles which require public speaking and giving presentations to large groups of people.

### MH Roles which require salespeople to work with each other

Her profile suggests that she is likely to feel quite comfortable and at ease in work settings which require her to develop close working relationships with colleagues.

### MH Roles which require salespeople to work in a competitive environment

She is likely to be more content than most to work in fairly competitive environments.

### M Roles which require salespeople to work long hours

Sam's profile suggests that her work ethic is in the average range. As a result, she is likely to believe work is reasonably important, and she would be expected to be as committed to work as most other people are. Consequently, she is likely to fit as well as most in working environments that have a long-hours culture. She is likely to prefer settings where there is a fair amount to do and where she is kept reasonably busy.

### M Roles which require salespeople to maintain high standards of accuracy

Sam's profile suggests that she is as achievement orientated as most and would be expected to be relatively motivated to produce work of a fairly high standard. She is likely to gain some sense of satisfaction from knowing others consider her to be good at her job. As a result, she is likely to function as well as most in settings where fairly high standards of accuracy are expected.

### M Roles which require sales to people to be able to work in a changing environment

While Sam is quite open to change and is likely to prefer to work in environments where she is free to initiate change, she may have trouble maintaining her levels of energy and drive in rapidly changing environments.

### MH Roles which provide salespeople with financial rewards and incentives

She would be expected to be more comfortable than most in a culture where the primary motivation for employees is financial rewards.