

# MANAGING FOR SUCCESS®

Sales Version

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

**John Smith**

Sales Representative

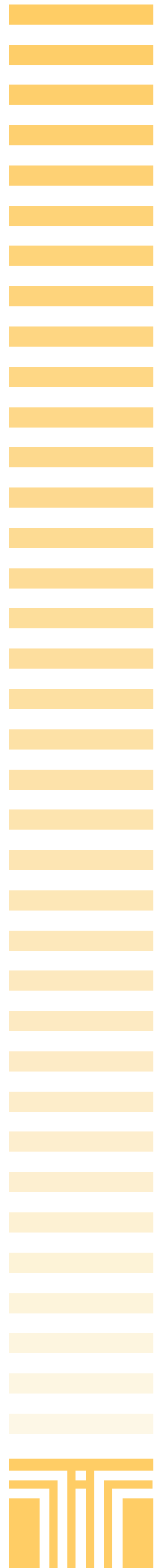
Sample Report

5/2/1998

*"Enabling Businesses to Succeed through People"*

## **People Success Solutions**

EXPERTS IN UNDERSTANDING BEHAVIOUR, VALUES AND SOFT SKILLS  
26 SOUTH STREET, MILNATHORT, KINROSS, PERTSHIRE, KY13 9XA  
TEL:(07773) 36-27-54 INFO@PEOPLESUCCESS.CO.UK FAX:(01455) 89-04-73  
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# INTRODUCTION

Behavioural research suggests that the most effective people are those who understand themselves, both their strengths and weaknesses, so they can develop strategies to meet the demands of their environment.

A person's behaviour is a necessary and integral part of who they are. In other words, much of our behaviour comes from "nature" (inherent), and much comes from "nurture" (our upbringing). It is the universal language of "how we act," or our observable human behaviour.

In this report we are measuring four dimensions of normal behaviour. They are:

- how you respond to problems and challenges.
- how you influence others to your point of view.
- how you respond to the pace of the environment.
- how you respond to rules and procedures set by others.

This report analyzes behavioural style; that is, a person's manner of doing things. Is the report 100% true? Yes, no and maybe. We are only measuring behaviour. We only report statements from areas of behaviour in which tendencies are shown. To improve accuracy, feel free to make notes or edit the report regarding any statement from the report that may or may not apply, but only after checking with friends or colleagues to see if they agree.

***"All people exhibit all four behavioural factors in varying degrees of intensity."  
-W.M. Marston***

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# SALES CHARACTERISTICS

*Based on John's responses, the report has selected general statements to provide a broad understanding of his sales style. This section highlights how he deals with preparation, presentation, handling objections, closing, and servicing. The statements identify the natural sales style he brings to the job. Eliminate or modify any statement that is not true based on sales training or experience.*

John is the type of individual who, when under pressure, displays a tremendous sense of urgency to meet his sales goals. He may lose interest in the product, program or service once the newness has worn off. He is comfortable in a sales environment that contains variety and/or high pressure situations. He is driven towards completion of his sales goals, and wants to be in a position to set policy that allows him to meet those goals. John prefers to win, respecting winners and those who show persistence. He sets high sales goals for himself. He sees the benefit of joining organizations as a way to meet his sales goals. He is an aggressive and confident salesperson.

John's body language may sometimes get him into trouble. He projects a great sense of urgency, which some buyers may interpret as an unwillingness to listen to their needs. He may not use enough facts to overcome objections; that is, he likes the challenge presented by the objection, and may attempt to answer, whether he has all the facts or not. He usually dominates the sales presentation. He prefers a fast and to-the-point approach, which may be too fast and blunt for some buyers. He usually welcomes objections as they provide him with an opportunity to share his knowledge. If he is careful to take objections seriously, it will allow him to be more effective. John's usage of sales aids may be higher if he participated in developing them. He may use confrontation to show his knowledge and expertise. Unless he is calling on an aggressive buyer, this may hinder the sale.

John will be direct and positive with his closes. He can be persistent and friendly at the same time. He may lose interest in a client once the sale has been completed. His further interest may be based on the client's ability to buy additional products or services. He can close so hard that he causes the buyer to think of objections, which may be excuses rather than real objections. He generally concentrates on selling new accounts as compared to servicing his present accounts. New accounts represent a challenge, while servicing old accounts may be dull and too routine. John prefers to service his accounts using one of two methods: excellent service for those accounts he likes, or those with potential; adequate or poor service for those accounts he does not like, or with little potential. He usually closes soon and often. He will close many sales the competition has sold but failed to close.

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## VALUE TO THE ORGANIZATION

*This section of the report identifies the specific talents and behaviour John brings to the job. By looking at these statements, one can identify his role in the organization. The organization can then develop a system to capitalize on his particular value and make him an integral part of the team.*

- Creative in his approach to solving problems and selling.
- Has the confidence to do the difficult assignments.
- Innovative.
- Accomplishes goals through people.
- Change agent--looks for faster and better ways.
- Self-starter.
- Competitive.
- Can support or oppose strongly.
- Self-reliant.

## CHECKLIST FOR COMMUNICATING

*Most people are aware of and sensitive to the ways with which they prefer to be communicated. Many people find this section to be extremely accurate and important for enhanced interpersonal communication. This page provides other people with a list of things to DO when communicating with John. Read each statement and identify the 3 or 4 statements which are most important to him. We recommend highlighting the most important "DO's" and provide a listing to those who communicate with John most frequently.*

### Do:

- Flatter his ego.
- Use the carrot approach when appropriate.
- Motivate and persuade by referring to objectives and results.
- Be brief--be bright--be gone.
- Speak at a rapid pace.
- Stick to business--let him decide if he wants to talk socially.
- Provide questions, alternatives and choices for making his own decisions.
- Look for his oversights.
- Use a balanced, objective and emotional approach.
- Expect him to return to fight another day when he has received a no answer.
- Confront when in disagreement.

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## DO NOTS ON COMMUNICATING

*This section of the report is a list of things NOT to do while communicating with John. Review each statement with John and identify those methods of communication that result in frustration or reduced performance. By sharing this information, both parties can negotiate a communication system that is mutually agreeable.*

### Do not:

- Try to convince by "personal" means.
- Take credit for his accomplishments.
- Let disagreement reflect on him personally.
- Be redundant.
- Direct or order.
- Ramble on, or waste his time.
- Forget or lose things; be disorganized or messy; confuse or distract his mind from business.
- Be paternalistic.
- Hesitate when confronted.
- Let him overpower you with verbiage.
- Try to build personal relationships.
- Come with a ready-made decision, and do not make it for him.
- Muffle or over legislate.

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## SELLING TIPS

*This section provides suggestions on methods which will improve John's communications when selling to different styles. The tips include a brief description of typical people in which he may interact. By adapting to the communication style desired by other people, John will become more effective in his communications with them. He may have to practice some flexibility in varying his communication style with others who may be different from himself. This flexibility and the ability to interpret the needs of others is the mark of a superior salesperson.*

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

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

Factors that will create tension:

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

When selling to a person who is magnetic, enthusiastic, friendly, demonstrative and political:

- Provide a warm and friendly environment.
- Do not deal with a lot of details, unless they want them.
- Provide testimonials from people they see as important.

Factors that will create tension:

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

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# SELLING TIPS

When selling to a person who is patient, predictable, reliable, steady, relaxed and modest:

- Begin with a personal comment--break the ice.
- Present yourself softly, nonthreateningly and logically.
- Earn their trust--provide proven products.

Factors that will create tension:

- Rushing headlong into the interview.
- Being domineering or demanding.
- Forcing them to respond quickly to your questions.

When selling to a person who is dependent, neat, conservative, perfectionist, careful and compliant:

- Prepare your "presentation" in advance.
- Stick to business--provide fact to support your presentation.
- Be accurate and realistic--do not exaggerate.

Factors that will create tension:

- Being giddy, casual, informal, loud.
- Wasting time with small talk.
- Being disorganized or messy.

## IDEAL ENVIRONMENT

*This section identifies the ideal work environment based on John's basic style. People with limited flexibility will find themselves uncomfortable working in any job not described in this section. People with flexibility use intelligence to modify their behaviour and can be comfortable in many environments. Use this section to identify specific duties and responsibilities that John enjoys and also those that create frustration.*

- Forum to express ideas and viewpoint.
- Needs difficult assignments.
- Nonroutine work with challenge and opportunity.
- Position with a tolerant sales manager.
- Evaluation based on results, not the process.
- Freedom to try new approaches.
- Work with a results-oriented team.
- Freedom from controls, supervision and details.

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# PERCEPTIONS

*A person's behaviour and feelings may be quickly telegraphed to others. This section provides additional information on John's self-perception and how, under certain conditions, others may perceive his behaviour. Understanding this section will empower John to project the image that will allow him to control the situation.*

## "See Yourself As Others See You"

### SELF-PERCEPTION

John usually sees himself as being:

Pioneering  
Competitive  
Positive

Assertive  
Confident  
Winner

### OTHERS' PERCEPTION

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

Demanding  
Egotistical

Nervy  
Aggressive

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

Abrasive  
Arbitrary

Controlling  
Opinionated

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# DESCRIPTORS

Based on John's responses, the report has marked those words that describe his personal behaviour. They describe how he solves problems and meets challenges, influences people, responds to the pace of the environment and how he responds to rules and procedures set by others.

Dominance	Influencing	Steadiness	Compliance
Demanding	Effusive	Phlegmatic	Evasive
Egocentric	Inspiring	Relaxed	Worrisome
Driving	Magnetic	Resistant to Change	Careful
Ambitious	Political	Nondemonstrative	Dependent
Pioneering	Enthusiastic	Passive	Cautious
Strong-Willed	Demonstrative	Patient	Conventional
Forceful	Persuasive	Possessive	Exacting
Determined	Warm	Predictable	Neat
Aggressive	Convincing	Consistent	Systematic
Competitive	Polished	Deliberate	Diplomatic
Decisive	Poised	Steady	Accurate
Venturesome	Optimistic	Stable	Tactful
Inquisitive	Trusting		Open-Minded
Responsible	Sociable		Balanced Judgment
Conservative	Reflective	Mobile	Firm
Calculating	Factual	Active	Independent
Cooperative	Calculating	Restless	Self-Willed
Hesitant	Skeptical	Alert	Stubborn
Low-Keyed	Logical	Variety-Oriented	Obstinate
Unsure	Undemonstrative	Demonstrative	Opinionated
Undemanding	Suspicious	Impatient	Unsystematic
Cautious	Matter-of-Fact	Pressure-Oriented	Self-Righteous
Mild	Incisive	Eager	Uninhibited
Agreeable	Pessimistic	Flexible	Arbitrary
Modest	Moody	Impulsive	Unbending
Peaceful	Critical	Impetuous	Careless with Details
Unobtrusive		Hypertense	

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# NATURAL AND ADAPTED SELLING STYLE

*John's natural selling style of dealing with problems, people, pace and procedures may not always fit the sales environment. This section is extremely important as it will identify if a salesperson's natural style or adapted style is correct for the current sales environment.*

## PROBLEMS - CHALLENGES (Natural)

John tends to attack sales challenges in a demanding, driving and self-willed manner. He is individualistic in his approach and will actively seek to achieve sales goals. He likes authority along with his responsibility and a territory that will constantly challenge him to perform up to his ability.

## PROBLEMS - CHALLENGES (Adapted)

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

## PEOPLE - CONTACTS (Natural)

John is enthusiastic about his ability to influence others. He prefers an environment in which he has the opportunity to deal with different types of individuals. He is trusting and also wants to be trusted.

## PEOPLE - CONTACTS (Adapted)

John feels the environment calls for him to be sociable and optimistic. He will trust others and wants a positive environment in which to sell.

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# NATURAL AND ADAPTED SELLING STYLE

## PACE - CONSISTENCY (Natural)

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

## PACE - CONSISTENCY (Adapted)

John sees the need to be involved in as many activities as his schedule will allow. He has a tendency to make everything a number one priority and wishes that everyone had his sense of urgency.

## PROCEDURES - CONSTRAINTS (Natural)

John wants to be seen as his own person who is willing and capable of interpreting the company policies to insure the best results and allow him creative and innovative methods of selling. He wants to be measured on his sales results, not how he achieved the results.

## PROCEDURES - CONSTRAINTS (Adapted)

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

## ADAPTED STYLE

*John sees his present work environment requiring him to exhibit the behaviour listed on this page. If the following statements DO NOT sound job related, explore the reasons why he is adapting this behaviour.*

- Alert, active attention to customers or clients.
- Adapting easily to changing sales territory.
- Using authority and responsibility for completing the sale.
- Reacting quickly to changes in the sales process or product line.
- Impulsive and eager to keep the sales presentation moving.
- Positive response to a client's objections.
- Exhibiting confidence in approaching customers.
- Using sales aids in presentation, when he remembers to take them with him.
- Using an informal sales presentation.
- Handling a variety of products or services.
- A resourceful, eager self-starter.
- A variety of sales activity.
- Ability to handle many new products or services.

## KEYS TO MOTIVATING

*This section of the report was produced by analysing John's wants. People are motivated by the things they want; thus, wants that are satisfied no longer motivate. Review each statement produced in this section with John and highlight those that are present "wants."*

John wants:

- Travel or changing territory.
- Outside activities so there is never a dull moment.
- A variety of products to sell.
- New challenges and problems to solve.
- A wide scope of activities.
- Changing environments in which to work/play.
- Power and authority to take the risks to achieve sales results.
- To be seen as a leader.
- Support troops to follow through with his part or detail work.
- Freedom from routine work.
- A sales manager who presents the big picture.
- Prestige, position and titles so he can control the destiny of others.
- Control of his own destiny.

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## KEYS TO MANAGING

*In this section are some needs which must be met in order for John to perform at an optimum level. Some needs can be met by himself, while management must provide for others. It is difficult for a person to enter a motivational environment when that person's basic management needs have not been fulfilled. Review the list with John and identify 3 or 4 statements that are most important to him. This allows John to participate in forming his own personal management plan.*

John needs:

- A tolerant sales manager.
- Restraints or program to calculate the risk involved by his decisions.
- To display empathy for people who approach life differently than he does.
- A program for pacing work and relaxing.
- Recognition that limits and rules do exist (and why).
- A health fitness program.
- To negotiate commitment face-to-face.
- To understand his role on the team--either a team player or the leader.
- Documentation of expected sales results.
- Opportunity to try the untried.
- Support in doing excessive detail work.
- To be confronted when in disagreement or when he breaks the rules.
- To know results expected and to be evaluated on the results.

## AREAS FOR IMPROVEMENT

*In this area is a listing of possible limitations without regard to a specific job. Review with John and cross out those limitations that do not apply. Highlight 1 to 3 limitations that are hindering his performance and develop an action plan to eliminate or reduce this hindrance.*

John has a tendency to:

- Take objections lightly.
- Resist participation as part of the team, unless seen as a leader.
- Not have presentation in a logical order.
- Not answer objections to buyer's satisfaction.
- Use fear as motive for buying.
- Represent himself with more authority than he may have.
- Talk too fast for the logical and detail-oriented buyer.
- Be a situational listener--hears only what he wants to hear.
- Blame, deny and defend when confronted with poor sales results.

# ACTION PLAN

Name: John Smith

The following are examples of areas in which John may want to improve. Circle 1 to 3 areas and develop action plan(s) to bring about the desired results. Look over the report for possible areas that need improvement.

Customer Service  
Prospecting  
Preparation  
Presentation  
Handling Objections

Closing  
Product Knowledge  
Personal Goals  
Other

Area:

- 1.
- 2.
- 3.

Area:

- 1.
- 2.
- 3.

Area:

- 1.
- 2.
- 3.

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

# BEHAVIOURAL FACTOR INDICATOR™

Sales Version

**John Smith**

Sales Representative

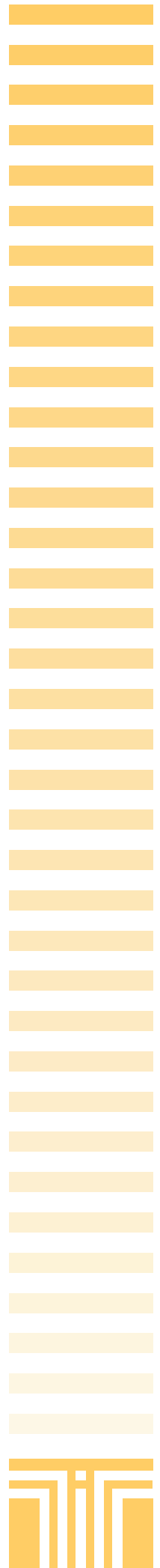
Sample Report

5/2/1998

*"Enabling Businesses to Succeed through People"*

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# INTRODUCTION

The principal purpose of this report is to help you win, to achieve a greater success in life and work. Winners, throughout history, have had one thing in common -- they know themselves. By reading your report you will gain insights about yourself. With these insights you can develop strategies to win in any environment.

Classifying selling behaviour is not an easy undertaking, largely because there are so many variables on which classification could be based. The classifications in this report are purely behavioural. Behavioural measurement can be classified as HOW a person will do a job. To discover WHY, additional information must be collected.

The Natural graph represents your natural behaviour - the behaviour you bring to the job. The Adapted graph measures your response to the environment - the behaviour you think is necessary to succeed at a job. If your Adapted graph is significantly different from your Natural graph, you are under pressure to change or "mask" your behaviour.

Read and compare your graphs. Look at each factor and the importance of that factor to the successful performance of your job. Your Adapted graph will identify the factors you see as important and shows you where you are focusing your energy.

Knowledge of your behaviour will allow you to develop strategies to win in any environment you choose.

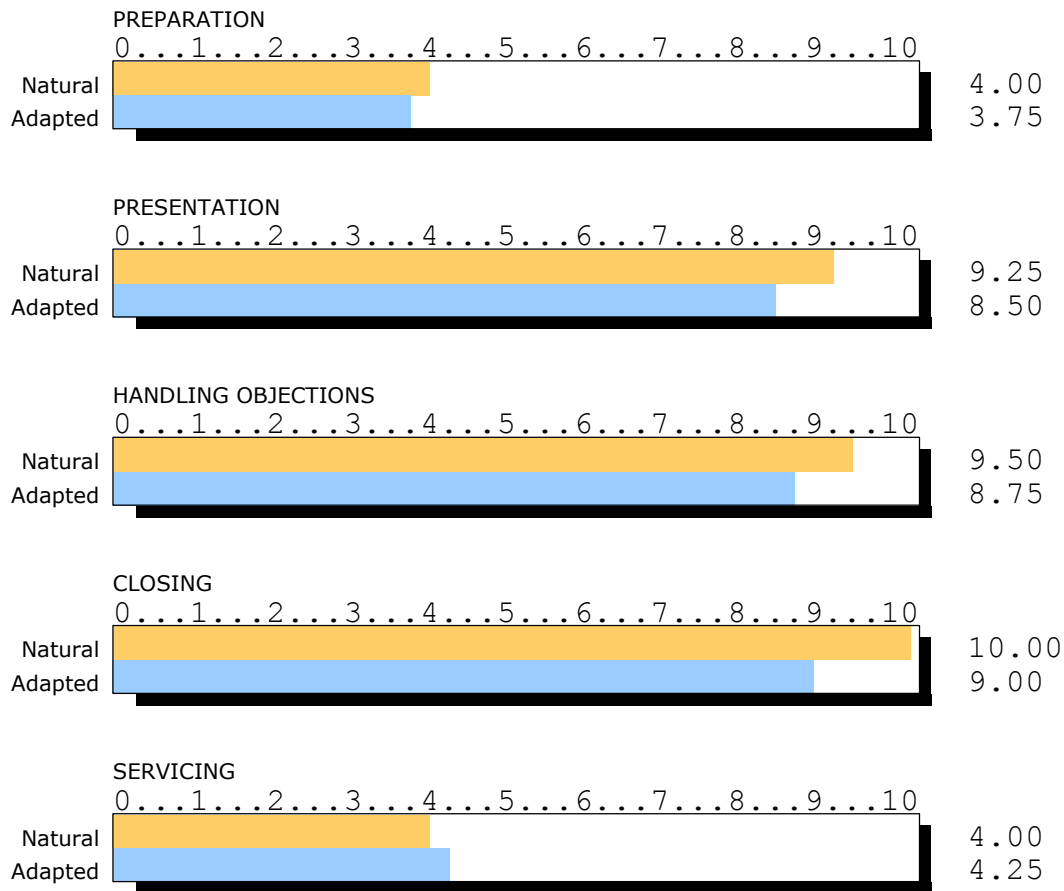
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# GENERAL FACTOR ANALYSIS

John Smith

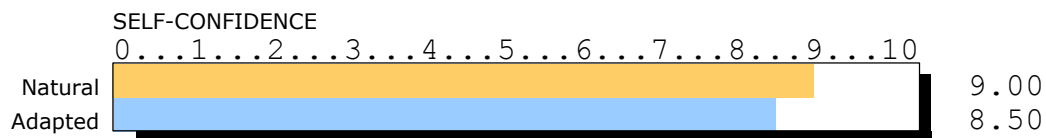
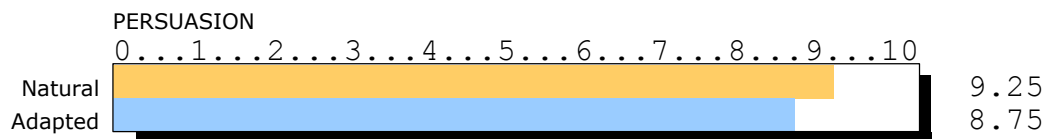
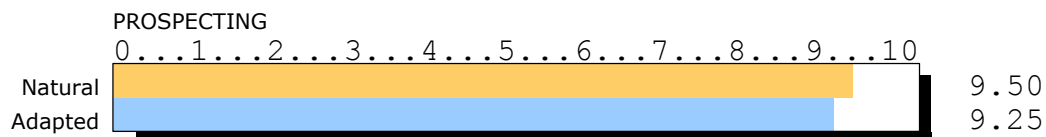
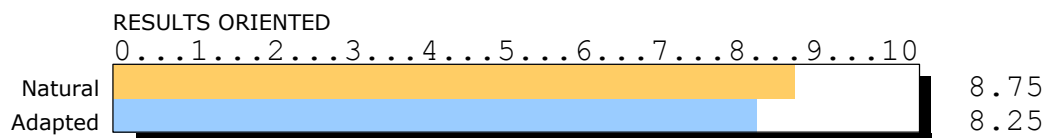
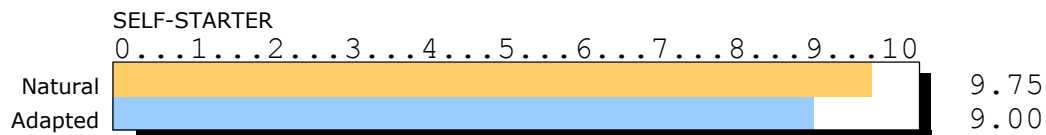
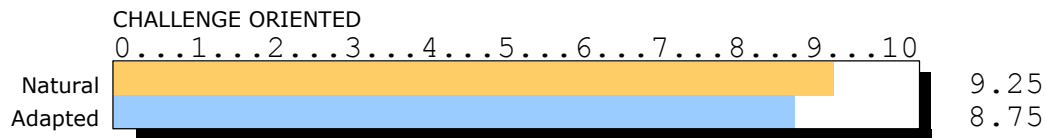


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# SPECIFIC FACTOR ANALYSIS

John Smith

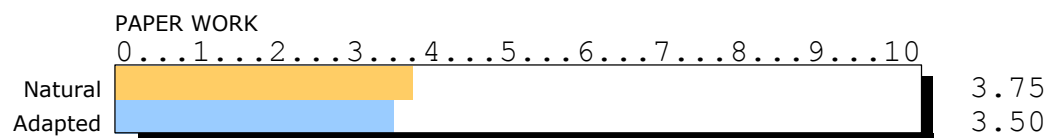
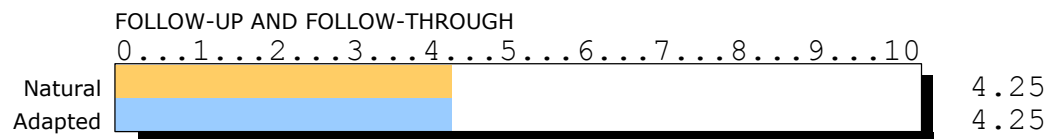
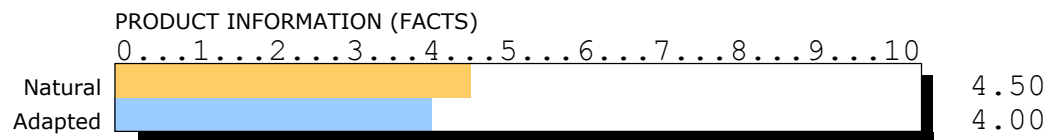
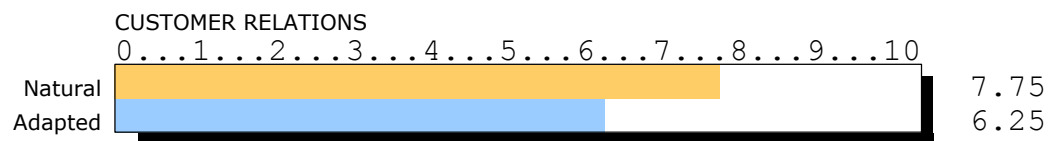
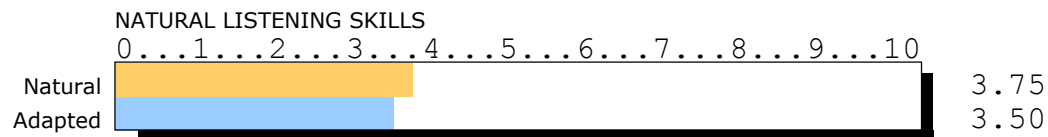
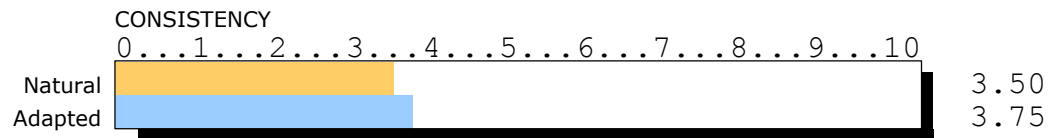


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# SPECIFIC FACTOR ANALYSIS

John Smith



# STYLE ANALYSIS™ GRAPHS

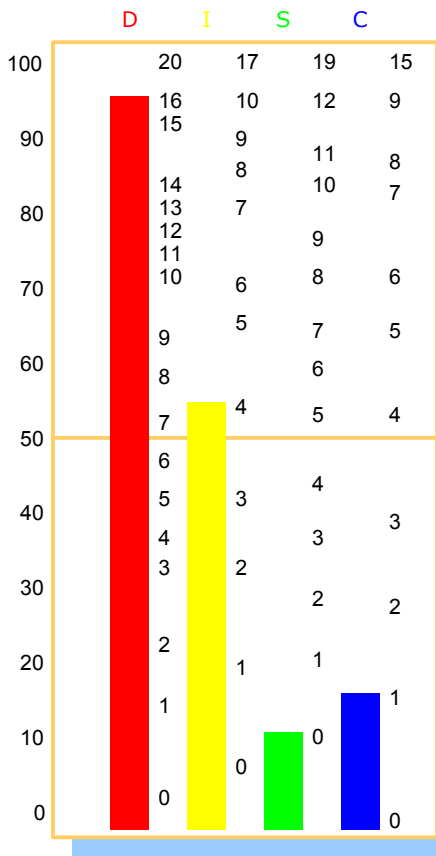
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Sample Report  
5/2/1998

MOST

Graph I

Adapted Style



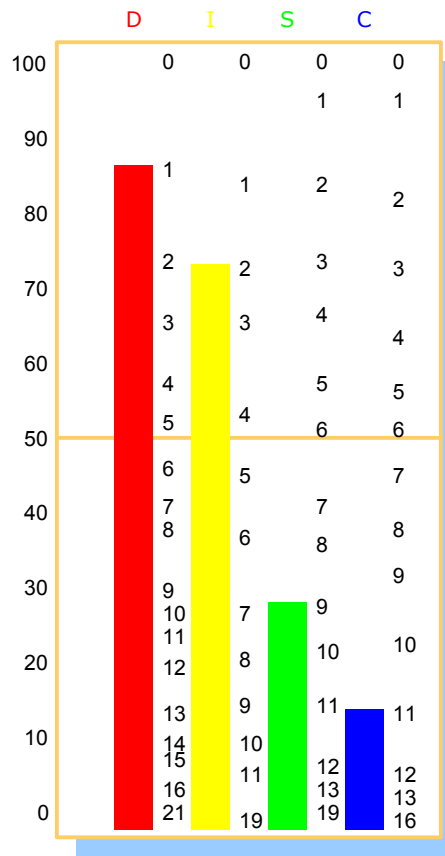
Score  
%

16	4	0	1
95	55	12	17

LEAST

Graph II

Natural Style



1	2	9	11
86	73	29	15

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# THE SUCCESS INSIGHTS® WHEEL

The Success Insights® Wheel is a powerful tool popularized in Europe. In addition to the text you have received about your behavioural style, the Wheel adds a visual representation that allows you to:

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

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

If you are part of a group or team who also took the behavioural assessment, it would be advantageous to get together, using each person's Wheel, and make a master Wheel that contains each person's Natural and Adapted style. This allows you to quickly see where conflict can occur. You will also be able to identify where communication, understanding and appreciation can be increased.

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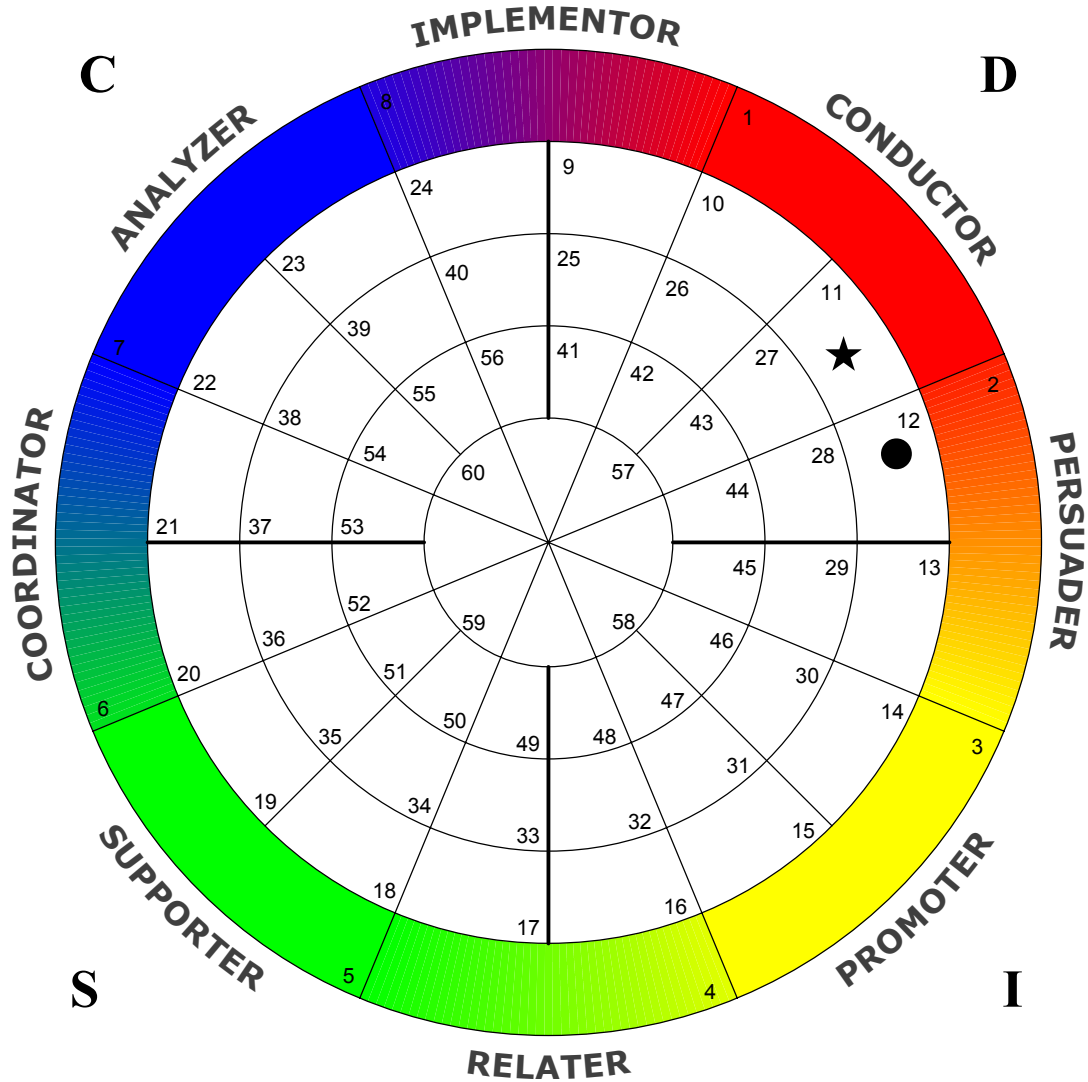
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# THE SUCCESS INSIGHTS® WHEEL

John Smith

Sample Report  
5/2/1998



Adapted: ★ (11) PERSUADING CONDUCTOR

Natural: ● (12) CONDUCTING PERSUADER

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