

TALENT MANAGEMENT DIVISION



PERSONAL ORIENTATION PROFILE POP 7


Sample Report Pack


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1. Management Report
2. Candidate Feedback Report
3. Management Coaching Guide
4. Candidate Coaching Guide

SELFMANAGEMENT 
GROUP
SELECT | DEVELOP | RETAIN | TOP PERFORMERS

RevenuePartners [formerly ThinkSales] is the exclusive reseller of the Self Management Group's suite of Psychometric Assessments in Southern Africa and a non-exclusive global reseller.

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MANAGEMENT REPORT FOR RECRUITMENT

Sample Report



PREDICTOR OF POTENTIAL

POP7.0™

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Create Report

#ESBMAX88UQL3
2019/09/03

Name: SAMPLE SAMPLE
Telephone: 4167460444
Email: service@selfmgmt.com
Requested By: Sample Reports

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PREDICTOR OF POTENTIAL POP7.0™

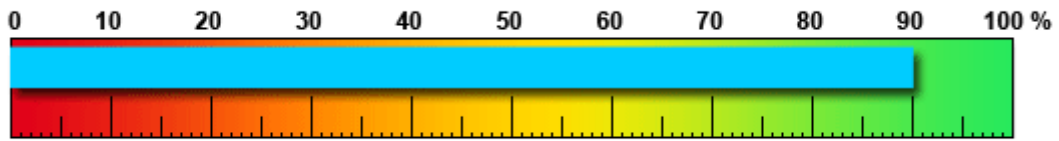
P.O.P. Science Score

OVERALL RECOMMENDATION



PROCEED WITH EXTREME CAUTION
PROCEED WITH CAUTION
PROCEED

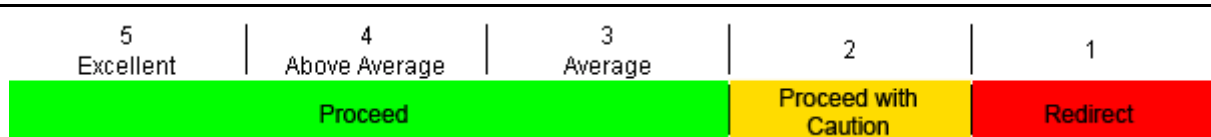
PROBABILITY OF SUCCESS



P.O.P. SCIENCE SCORE

	Score		Rating
EP = Enterprising Potential Predicts daily activity and survival	<u>61</u>	If EP is 60 or higher 5 If EP 40 - 59 4 If EP 20 - 39 3 If EP is less than 20 2	<u>5</u>
AP = Achievement Potential Describes motivational factors and predicts closing style IP = Independence Potential Describes the comfort and need for structure and systems	<u>-3</u> <u>-3</u>	Subtract 1 if: AP is less than -5 or IP is less than -25	<u>0</u>
SD = Self Directed Reflects feelings of being in control CR = Call Reluctance Reflects candidate's attitudes about prospecting, handling rejection and sales as a career.	<u>63</u> <u>80</u>	Subtract 1 if: SD is less than 25 or CR is less than 30	<u>0</u>
		FINAL POP7.0™ RATING (min. 1)	<u>5</u>

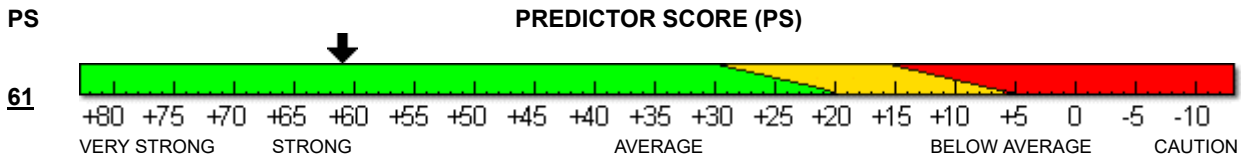
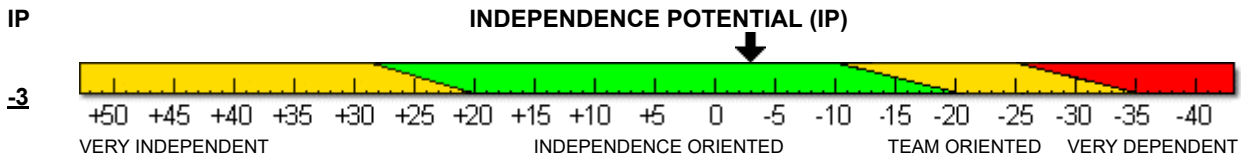
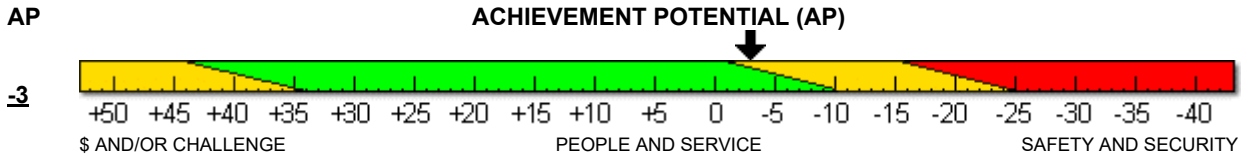
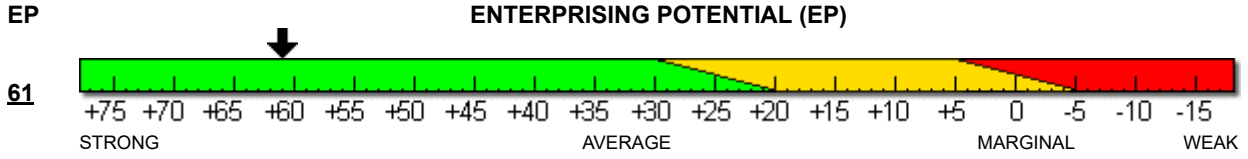
Science Rating



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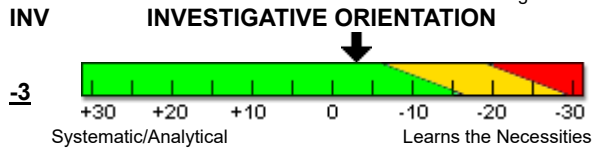
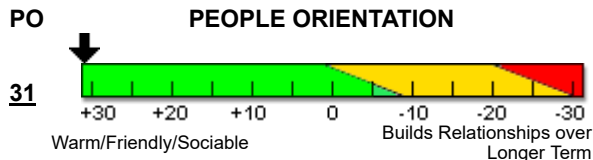
Summary of Scores & Cautions

SUMMARY OF SCORES & CAUTIONS

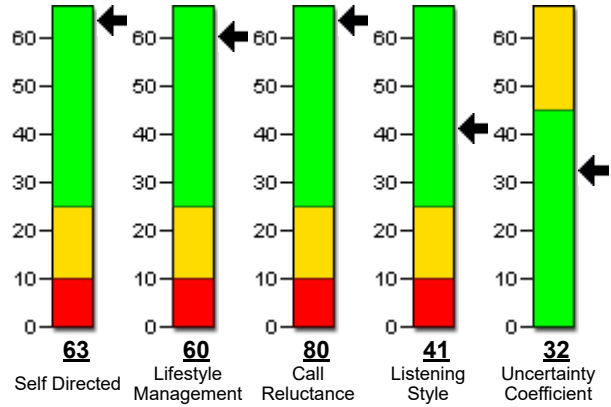


COMMUNICATION STYLE

ATTITUDES



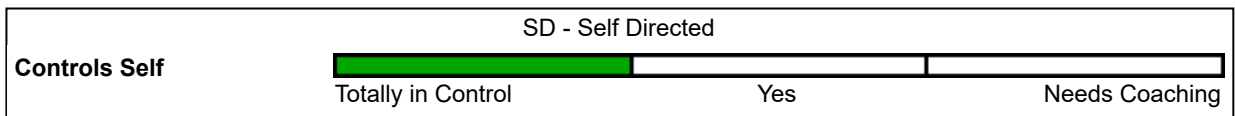
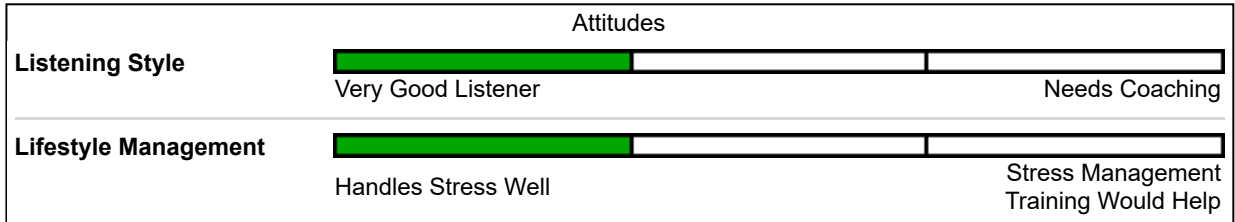
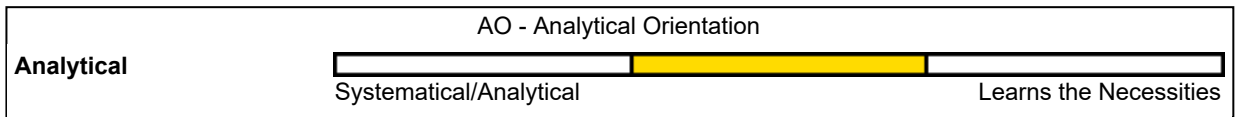
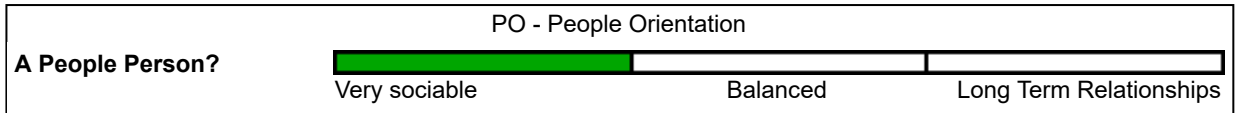
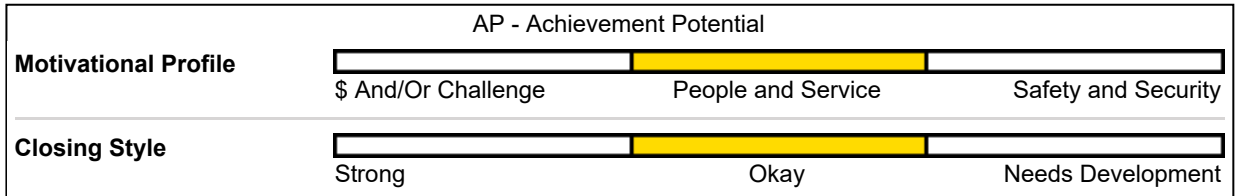
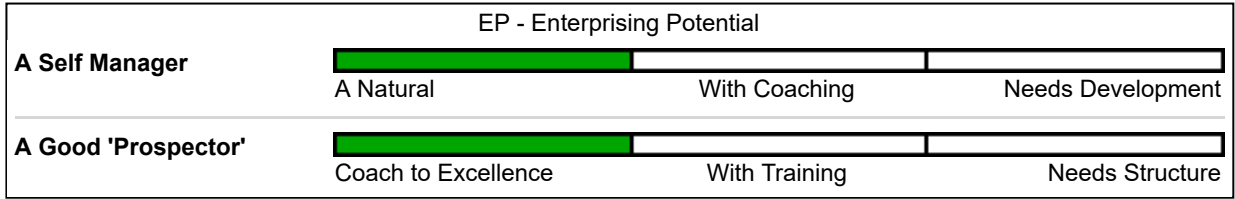
61 **84** **-3** **-3** **61**
 EP BL AP IP PS



PREDICTOR OF POTENTIAL POP7.0™

Snapshot of Sales Potential

SNAPSHOT OF SALES POTENTIAL



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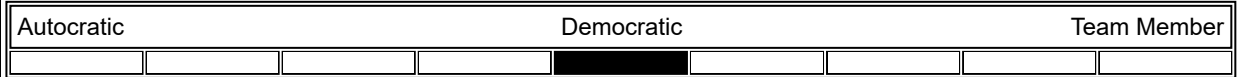
MANAGEMENT PREVIEW

Performance Management



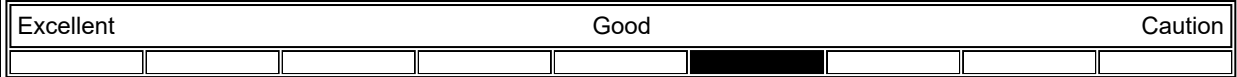
An indicator of performance expectations as they relate to managing a sales force.

Leadership Style



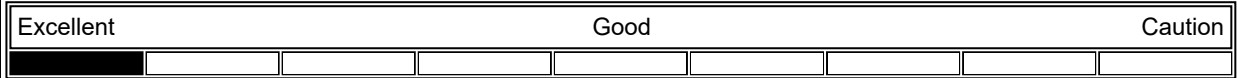
A measurement of natural leadership style and approach with others.

Training & Development



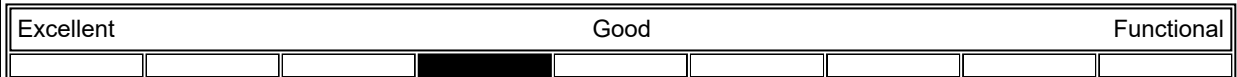
The natural inclination to train and develop new representatives.

Recruiting/Attraction



The potential to attract a high volume of recruits.

OVERALL PREVIEW



An overall assessment of potential as a sales manager.

SELECTION CONSIDERATIONS

Enterprising Potential (E.P.): In competitive business environments, their strength on the E.P. Scale would indicate a strong potential for basic survival. This individual should have a very strong natural inclination towards being a self-manager. Given formal training in planning and time management skills, this individual should be able to make a routine of the daily effort required to maintain the basic contact activities essential for survival in demanding business opportunities.

Achievement Potential (A.P.): This A.P. Scale result is below average and warrants a caution no matter what the results are on other measures. This low a score on the A.P. Scale indicates an extremely high probability that this person will not be able to become involved wholeheartedly in and committed to any job which has the earning of a high income as one of its prime purposes. This individual could have some quick successes in a 'honeymoon' period but the likelihood of their remaining effective over a longer time is very low unless this individual can develop an unusually powerful emotional as well as intellectual commitment to the product and service.

Independence Potential (I.P.): This is a relatively neutral score on the I.P. Scale. Scores in this range normally reflect people who are modestly independent but are able to adapt to a structured environment. It is a good fit for a sales culture that is relatively structured but allows some room for individual initiative.

People Orientation (P.O.): This is a very strong result on the P.O. Score. This person will find a position with lots of interaction with new people to be a real plus. Keep in mind as well, that people who are extremely people-oriented can also be sensitive to rejection if the interaction feels wrong.

Investigative Orientation (INV.): This is an average to low average result on the INV. Score. If this individual has successfully completed some program of training in the last few years, this will be an indication that this individual should be able to succeed at most basic training programs.

Call Reluctance

This person is very comfortable managing call reluctance and this individual would not require much support to deal with call reluctance from an attitudinal perspective.

Managing Rejection: Their high score on the managing rejection scale indicates that this individual would tend to perceive the sales process in a very objective manner. This individual would be primarily focused on identifying client needs rather than on how the client was responding to them personally during the sales process. This individual would not likely take rejection personally in the sales process. This individual is very unlikely to confuse a client's feelings about the product with feelings toward them personally.

Prospecting Orientation: This person would enjoy and be quite comfortable in dealing with prospects in their natural market providing this individual has a suitable commitment to the product or service that this individual is presenting. Prospecting in cold markets would provide a positive challenge with appropriate training and joint field work with a mentor or manager.

Commitment to a Sales Career: Based on their positive image about a sales career, this individual will enjoy approaching prospects in their natural market about the career this individual has selected. Therefore, this individual would be an excellent source of potential recruits. From a motivational perspective, a manager can facilitate very high performance levels by reinforcing this concept during early training and throughout the developmental process.



INTERVIEW QUESTIONS

Enterprising Potential (E.P.)

- How would you describe your skills in self-management? How do you plan and organize your day?

- How would you like to improve your skills in self-management?

- Tell me about a task or responsibility that you have had when you needed to take the requirement, convert it into a plan for action and how you managed your time and focused your effort to get the job done.

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Achievement Potential (A.P.)

- What do you feel are the strongest motivating factors in your life? What have you done in the past few years which was 'people' or service oriented? How much time, commitment and effort did you put into these people oriented experiences? Have you done anything in the same time which was clearly bottom line, results, performance or productivity oriented? How much time, commitment and effort did you put into these performance oriented experiences? What did you achieve in each of these circumstances and how do you feel about these achievements?

- Tell us about something you have done which was exceptionally demanding and which required unusual strength of resolve, or physical or mental stamina.

- What have you done in the recent past to improve your personal or professional skills? How do you feel about taking in-house or other recommended personal and skills development opportunities offered by or outside of the company?

Independence Potential (I.P.)

- How would you say you function as part of a team? How do you feel about work or personal situations in which you have to operate entirely on your own? Which do you feel is the most likely to bring the greatest productivity and satisfaction?

- Are there any specific examples of things you have done to promote team harmony and effectiveness? If so how successful were you?

- Has this individual tried to fulfill their potential in supervision or management through formal or self study programs in these areas? Has this individual had any specific learning experiences in these areas? Will this individual take such programs now, even at their own expense and on their own time, to themselves more able to function on their own when necessary?

- How did you get along with your most recent supervisor/manager? What kind of interaction do you expect to experience with a new manager? What style of interaction would you use with others in your operation?

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Interview Questions (cont'd)

People Orientation (P.O.)

- How do you feel about meeting and putting people at ease?

- How well you adjust to different personalities?

- How do you feel about the importance of team work and good public relations in achieving company goals?

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Investigative Orientation (INV.)

- How do you feel about 'going back to school' and learning new things related to your current job and to possible future career needs? What have you done on your own in the last two years to upgrade your technical, practical or personal skills?

- What do you see as your areas of current technical/practical competencies?

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Managing Rejection

- In social situations, do others tend to approach you or do you usually initiate contact? Why?

- How important is it to get a potential buyer to like you?

- How does a sales person feel if you tell them you do not want to buy their product?

- Have you ever not bought a product you needed from a sales person you liked? Why?

- What is the ideal time to approach a potential client?

- Describe a situation where felt someone disliked you because of something you did? What did you do to correct the situation? Were you successful in getting the other person to like you?

Prospecting Orientation

- Have you discussed this sales career with your family? If yes, what was the response? If no, why not?

- When approaching your friends to buy our products and services, would you set a formal interview or do it on an informal basis? Why?

- Are your family and friends a good source of sales? Why?

- Describe the last time you tried to sell something (an idea, service, product) to a friend. What was the result?

- Describe the last time a friend tried to sell you something. Did you buy? Why or why not?

Commitment to a Sales Career

- What is the image of a sales person according to the general public?

- How would your best friends describe a sales person?

- How do you feel about sales as a career?

- What are the qualities you would like to change in the sales people you have met?

- What percentage of your buying decisions are based on the feelings you have toward the salesperson?

PREDICTOR OF POTENTIAL POP7.0™**Responses from Opinions Section**

1=Don't Agree At All	2=Agree A Little	3=Somewhat Agree	4=Moderately Agree	5=Definitely Agree
----------------------	------------------	------------------	--------------------	--------------------

- | | |
|---|--|
| <p>1. Effort gets results (5)
 2. I thrive under pressure (5)
 3. I rarely interrupt others while they are speaking (5)
 4. It is easier to sell to friends than to strangers (4)
 5. I am often influenced by others (3)
 6. I would have difficulty integrating a demanding career into my lifestyle (1)
 7. I have never told lies (2)
 8. Aggressive sales people usually make a good income but have less repeat business (1)
 9. Most mistakes can be avoided (4)
 10. I am comfortable with changes in technology (5)
 11. I like to hear people fully explain their point of view (4)
 12. I avoid actions that might make people dislike me (1)
 13. People's good qualities are seldom recognized (2)
 14. I sometimes lack the energy to perform important tasks (1)
 15. Most conversations take too long (1)
 16. It is important that people approve of me (2)
 17. I am good at most things that I try to do (4)
 18. I stay focused on my priorities (4)
 19. After listening to an interesting anecdote, I like to describe a similar situation involving me (4)
 20. Salespeople have a positive public image (4)
 21. Success is mostly luck (1)
 22. I often allow my attitude to affect my performance negatively (1)
 23. All of my habits are good and desirable ones (4)
 24. It is very important to push people to buy a product or service after you have established that they need it (2)
 25. People get the respect that they deserve (1)
 26. I generally have a positive attitude towards work (5)
 27. I never envy others their good luck (5)
 28. Salespeople make more money than they deserve (2)
 29. It is impossible to change company procedures (1)
 30. I find it difficult to manage my professional demands (1)
 31. I prefer to listen in conversations (1)
 32. I find it easy to make new acquaintances (5)
 33. Hard work brings success (5)
 34. I excel in a dynamic environment (5)
 35. I consciously pause before responding to others (5)
 36. My first sales should be to my family and friends (5)
 37. Plans never work out (1)
 38. I often avoid difficult tasks (1)
 39. I have never been late for work or for an appointment (1)
 40. In a group, I feel uncomfortable if a person does not like me (2)
 41. I create opportunities (5)
 42. I take care of myself with good daily habits (5)
 43. I try to do most of the talking when presenting materials to others (1)
 44. I have been successful in developing a large network of people (5)
 45. Compliments make me uncomfortable (1)
 46. I have difficulty coping with daily job challenges (1)
 47. I have never boasted or bragged (1)
 48. I adapt to what others expect of me (1)</p> | <p>49. A good plan can avoid mistakes (3)
 50. Stress improves my performance (5)
 51. After listening to someone talk, I repeat the important points back to them to insure my understanding (5)
 52. I often refer people to my family and friends (5)
 53. Hard work does not always get results (1)
 54. To be effective on the job, I need more energy (1)
 55. I make sure others have finished speaking before I respond (1)
 56. Informal social events are a good source of sales contacts (5)
 57. I find it easy to talk about myself (5)
 58. Regular habits are an important part of my success (5)
 59. I have never said anything unkind about anyone else (1)
 60. I have met very few people whom I did not like (4)
 61. I am distracted easily (1)
 62. Professional demands often interfere with my lifestyle (1)
 63. People take too long to get to the point (1)
 64. I get upset when salespeople call me at home (1)
 65. I am a confident person (5)
 66. I can concentrate on my work for long periods of time (1)
 67. I will interrupt other people to provide an answer to their question (1)
 68. To be successful at sales, I must change my image (1)
 69. My performance depends on the situation. (1)
 70. To be effective, I need to make several lifestyle changes (2)
 71. No one is ever rude to me (1)
 72. I would rather approach a potential new client by telephone than in person (4)
 73. I am successful in most aspects of my life (5)
 74. Work does not get me down (5)
 75. I enjoy listening to other people (5)
 76. Most people would prefer not to deal with salespeople any more than necessary (1)
 77. I am reluctant to make decisions (1)
 78. Lifestyle demands have interfered with my career success (5)
 79. I always admit my own mistakes (4)
 80. I would not like to be known as a salesperson (4)
 81. I take time to reflect on my accomplishments (4)
 82. I enjoy pressure on the job (5)
 83. I give others my undivided attention when they are speaking to me (4)
 84. I have bought a product or service mainly because of the salesperson (1)
 85. I let the organization define my training needs (1)
 86. People do not understand the pressures of my job (1)
 87. I prefer to ask very specific questions that require only a 'yes/no' answer (5)
 88. My family and friends are a good source of sales (5)
 89. Effort is entirely my responsibility (5)
 90. I manage stress effectively (1)
 91. I have a tendency to finish other people's sentences (1)
 92. Rejection is the most difficult aspect of sales (1)
 93. Others have interfered with my success (1)
 94. It is difficult to establish job priorities (1)
 95. I am not a good listener (1)
 96. I feel comfortable promoting myself and my company at social gatherings (5)</p> |
|---|--|

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TRAINING & COACHING SUGGESTIONS

Based on the Enterprising Potential (E.P.) Results

(Coaching Suggestions) Maximize existing strengths through training in basic personal time management and activity planning skills. Develop specific job related task planning and self management skills. Train them in these areas and monitor their planning and their activities until this individual demonstrates consistency. This individual can and will work best if you focus on the management of their EFFORT.

Based on the Achievement Potential (A.P.) Results

(Training Requirements) Even with training in the techniques and timing for closing, it is unlikely that this person will show persistence in the face of objections unless this individual is absolutely convinced that the product or service that this individual represents is the best possible thing that any given prospect could possibly have. You would have to teach them about both the product itself and about the tremendous importance of the product to the end user.

Based on the Independence Potential (I.P.) Results

(Training Requirements) You must target the development of a greater degree of independence as a major objective for this person. Be very careful that you insist upon their taking full responsibility for themselves from the very first day and especially that you do NOT allow a dependency relationship to develop.

Based on the People Orientation (P.O.) Results

(Coaching Recommendations) Training in the field will probably be most effective if this individual is paired with another highly 'people oriented' type 'coach'.

Based on the Investigative Orientation (INV.) Results

(Training Suggestions) Don't just assume that if this individual has the books and materials that this individual will learn the content. Probably this individual should be monitored carefully through training to ensure that this individual does learn the necessary material.

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RETENTION PROSPECTS

Based on the Enterprising Potential (E.P.) Results

This individual may balk at working within an overly structured work situation as this individual needs continuing opportunities to customize the job structure to make it their own. This individual will likely need little managing in the long run from the standpoint of structuring and organizing the work.

Based on the Achievement Potential (A.P.) Results

Any significant pressure on them to prove themselves or to increase their production requirements would probably be wholly unacceptable. This individual can be motivated to do better in a financial or challenge sense only if doing better first means that their 'service' orientation is most strongly satisfied.

Based on the Independence Potential (I.P.) Results

This individual will want a close and continuing friendship/employee relationship with their manager. If the relationship becomes too much of a burden to management, this individual may be dismissed long before this individual wants to leave.

Based on the People Orientation (P.O.) Results

Since this individual gets a lot of their satisfaction out of people contact, recognition from the boss and their peers will be very important.

Based on the Investigative Orientation (INV.) Results

It is likely that this individual would find it a disincentive having a constant pressure to learn new material and/or new methods.

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CANDIDATE FEEDBACK

An Overview of Your Personal Characteristics & Career Strengths

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Personal Strengths/Career Needs	1
What to Seek/What to Avoid in Jobs	2

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PREDICTOR OF POTENTIAL POP7.0™**Personal Strengths/Career Needs****In Terms of Enterprising vs Support Role Possibilities**

You would be described as extremely competitive, enterprising, assertive, aggressive, tough minded, determined and goal oriented. You may display new and creative ways to reach your personal and work objectives and you will be self-evaluative and sometimes critical of your own performance. Given an aim, objective or requirement, you would be able to develop your own plan, manage your time and focus your effort on a daily basis to reach your goals. Being a self-manager should come very naturally to you and these skills should be refined through formal training and/or on-the-job experience.

In Terms of Your Style & Strength of Various Motivations

You would be described as being motivated primarily by a genuine concern for the well-being and needs of others. People would see you as quite calm, steady, unhurried, predictable, stable and cooperative. Given an opportunity to focus your efforts on the achievement of some meaningful and perhaps demanding, long term 'people-oriented' goals, you could become a very loyal, dependable and dedicated member of the team delivering the product or service. Generally your motivational pattern will produce the greatest personal satisfaction and your best performance in positions requiring ongoing commitment to goals which you feel have real merit in alleviating the distress or adding to the quality of life of the people who receive the results of your efforts.

In Terms of Your Independence vs Your Need to Be in the 'Team'

You would be described as cooperative, obliging, efficient, conscientious, painstaking and team oriented. You would follow company rules and highly value security in your work. You must be careful not to allow a heavy dependency to develop between you and your fellow workers and/or your supervisor.

In Terms of Your Orientation Towards the 'People' Side of Business

You would be described as extremely sociable, entertaining, cheerful, genial and outgoing. In addition to being a fluent talker, you would be comfortable with new people, value social interaction and make new friends easily. Generally, you would be a good company representative and have the ability to communicate with a wide variety of people in a number of different functions. Being extremely sociable could make you somewhat sensitive to rejection.

In Terms of Your Orientation Towards Technical & Practical Concerns

You would be described as somewhat logical, reflective, analytical, factual and practical. Intellectual challenges, when offered just as challenges without any obvious practical utility, would not appeal to you as strongly as would other kinds of challenges and opportunities. Ideas and concepts which were of solid practical use would be of interest to you.

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PREDICTOR OF POTENTIAL POP7.0™**What To Seek/What To Avoid In Jobs****What Should You Look for In a Job/Career that Matches You Best?**

- + Look for opportunities to create your own work structure and to develop your self-management skills by training in time management and activity planning. The opportunity to put solid effort into the job each day is a real plus for you as you know that effort invested consistently will produce the results you seek in both productivity and recognition.
- + Look for a career position which will have both social value in terms of what the function does to help others and personal security in terms of the opportunities it offers to you to make a long term, ongoing commitment of your talents and energy.
- + You should look for an opportunity to be a part of a team and provide a really important service to fellow workers and to clients of the company.
- + Look for employment that provides you with lots of people contact on a daily basis. A job with a great deal of person to person interaction and public relations opportunities would be ideal for you.
- + Look for employment that has a limited amount of analytical, technical and discovery learning to it. There are other challenges and rewards in the work environment which are more appealing to you. When you discover these, target them as ideal job requirements/opportunities.

What Should You Avoid in Jobs/Careers that Don't Match You?

- Avoid tightly and rigidly structured work situations. If there is no room to put your personal touch to work in organizing and managing yourself, the job may become too constricting for you. Try to avoid jobs that may limit your self-management skills development which is a very strong need in you for your personal productivity and your sense of satisfaction with any job.
- Avoid positions which you feel have little value in terms of their impact on the quality of life of the people who receive the product or service. A job with intense, short term and repeating 'production' requirements would not give you the best opportunity to employ your talents and energy effectively.
- Avoid work situations where you might be required to often work independently and be deprived of the opportunity for team work.
- You should avoid employment that would isolate you from people. A job that lacks social interaction would not be adequately stimulating and rewarding to you.
- Avoid jobs that are particularly detail oriented. Jobs that require you to quickly learn and apply new technologies or vast amounts of new information won't be particularly satisfying.

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CANDIDATE REPORT FOR RECRUITMENT

Sample Report

CANDIDATE FEEDBACK

An Overview of Your Personal Characteristics & Career Strengths

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PREDICTOR OF POTENTIAL POP7.0™**Personal Strengths/Career Needs****In Terms of Enterprising vs Support Role Possibilities**

People would see you as being occasionally assertive, determined and goal oriented within well defined situations. More often, you would appear to be generally accepting, agreeable, considerate, mild mannered and cautious in any less clearly defined work or personal situation. Given a requirement or objective and a plan of how to reach the objective, you could be depended upon to work diligently to achieve the stated goals. Your talents would probably find their best utilization in the service or support aspects of a company.

In Terms of Your Style & Strength of Various Motivations

You would be described as being motivated primarily by a genuine concern for the well-being and needs of others. People would see you as quite calm, steady, unhurried, predictable, stable and cooperative. Given an opportunity to focus your efforts on the achievement of some meaningful and perhaps demanding, long term 'people-oriented' goals, you could become a very loyal, dependable and dedicated member of the team delivering the product or service. Generally your motivational pattern will produce the greatest personal satisfaction and your best performance in positions requiring ongoing commitment to goals which you feel have real merit in alleviating the distress or adding to the quality of life of the people who receive the results of your efforts.

In Terms of Your Independence vs Your Need to Be in the 'Team'

You would be described as quite cooperative, obliging, efficient, conscientious, painstaking and team oriented. Generally, you would be easy on others and quite accepting of supervision. You would be a good company person working well within a variety of group settings. Security and stability would be valued working conditions desired in the job.

In Terms of Your Orientation Towards the 'People' Side of Business

You would be described as quite sociable, enthusiastic, cheerful, genial and outgoing. You would enjoy personal relationships and interactions, and would make a good company representative in terms of customer satisfaction and personal and company public image. You might be very sensitive to rejection in some circumstances.

In Terms of Your Orientation Towards Technical & Practical Concerns

You would be described as somewhat logical, reflective, analytical, factual and practical. Intellectual challenges, when offered just as challenges without any obvious practical utility, would not appeal to you as strongly as would other kinds of challenges and opportunities. Ideas and concepts which were of solid practical use would be of interest to you.

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PREDICTOR OF POTENTIAL POP7.0™**What To Seek/What To Avoid In Jobs****What Should You Look for In a Job/Career that Matches You Best?**

+ Look for eventual employment with an organization which has an established work objective and detailed work plan; preferably one which uses your special talents in an ongoing service or support role rather than in a short-term, repeating and pressured goal attainment requirement.

+ Look for a career position which will have both social value in terms of what the function does to help others and personal security in terms of the opportunities it offers to you to make a long term, ongoing commitment of your talents and energy.

+ You should look for a job that is stable in an established work environment. Your preference should be to work within a recognized team type situation. For even greater job satisfaction, you should find a company that you can identify with and respect for their products and services.

+ You should look for employment that provides you with people contact or some public relations opportunities. You derive satisfaction from interaction with other people in both personal and work environments.

+ Look for employment that has a limited amount of analytical, technical and discovery learning to it. There are other challenges and rewards in the work environment which are more appealing to you. When you discover these, target them as ideal job requirements/opportunities.

What Should You Avoid in Jobs/Careers that Don't Match You?

- Avoid working in an environment which requires you to be responsible for your own work planning and/or which requires the attainment of repeated high pressure goals. Unstructured or apparently disorganized work environments would not be able to employ your talents to the best degree.

- Avoid positions which you feel have little value in terms of their impact on the quality of life of the people who receive the product or service. A job with intense, short term and repeating 'production' requirements would not give you the best opportunity to employ your talents and energy effectively.

- Avoid work environments which have poor supervision or very inexperienced supervisors and those positions that demand an intense level of independence and/or a high demand to work essentially on your own all of the time.

- You should avoid employment in jobs that have only limited feedback from others. You should also not be in situations that isolate you from others.

- Avoid jobs that are particularly detail oriented. Jobs that require you to quickly learn and apply new technologies or vast amounts of new information won't be particularly satisfying.

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MANAGEMENT REPORT COACHING GUIDE

Sample Report



A Guide to Helping SAMPLE SAMPLE Build Success Habits and Build SAMPLE's Business!

ID#: ESBMAX88UQL3
2019/09/03
Sample Reports

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Introduction

The purpose of this guide is to help mentors and/or managers assist SAMPLE SAMPLE to build success habits that will help him/her succeed in a challenging sales career.

This report identifies SAMPLE's strengths and provides suitable coaching strategies to take advantage of his/her strengths as he/she goes through the phases of his/her career.

Phase 1: Building Success Habits

At the beginning of any sales career or when someone starts with a new organization, they will need to build the habits which will help them when:

- studying and taking courses to pass licensing examinations (if applicable)
- learning about the products and services
- developing relationships with new manager(s) and colleagues
- understanding how to make use of the technical and business support people in the organization
- understanding the market and its needs

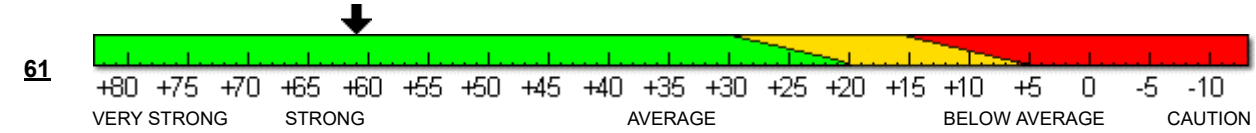
Phase 2: Building the Business

Once trained in the organization's products and sales methods, the sales representative's responsibilities will change and personal success will be more directly correlated to the success of the organization. The success habits developed in Phase 1 will be complemented by new ones as the sales representative builds a business.

This report is customized based on SAMPLE SAMPLE's personality traits and attitudes. Please refer to it as a source of coaching strategies that have been shown to be effective with salespeople with his/her profile.

Commitment and Growth

Fit to Sales Career (Predictor Score)



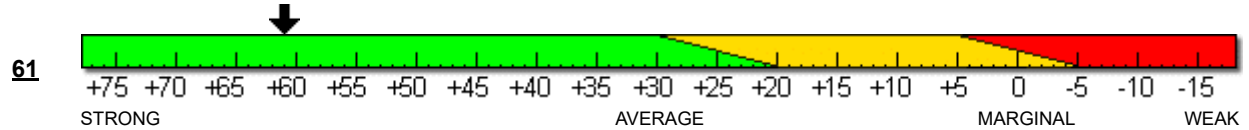
SAMPLE is very well suited to competitive sales and has the attributes to make him/her successful in this field.

Coaching Strategies

- Use this report to identify his/her strengths and how to use them.
- Encourage a personal commitment to his/her sales career in order to take full advantage of his/her potential.
- Set high standards for him/her in terms of activity and results. If he/she takes control of his/her activity, the results will follow if he/she keeps working and improving his/her skill set.
- Meet regularly with him/her and use those meetings to learn what he/she is doing well and how to leverage his/her strengths.

Building Success Habits

Self Management (Enterprising Potential)



SAMPLE is very enterprising, competitive, determined and goal oriented. He/She has the potential to be very successful. During the period of his/her orientation and training, it will be important for him/her to build the type of success habits that he/she can carry throughout his/her career. As he/she starts to grow his/her business, he/she will need to have his/her daily and weekly habits reinforced until they are part of his/her routine.

Building Good Habits

- Help him/her build his/her daily plan and weekly progress goals for whatever he/she is doing.
- Help him/her to plan and record the plan for his/her daily activity (number of hours of study, meetings and other essential activities etc). By doing this, he/she will establish a habit of setting his/her goals.
- Make certain that he/she plans his/her daily work and completes it.
- Reward him/her for keeping his/her commitments.

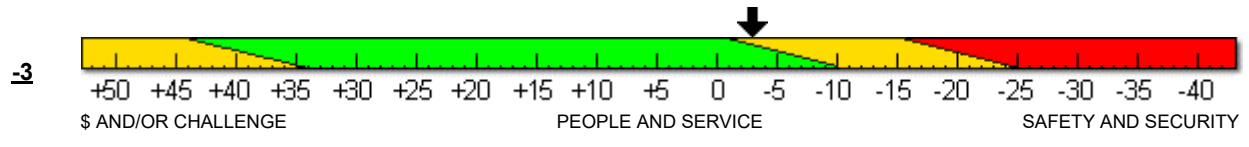
Building his/her Business

- Help him/her set goals for activities which he/she can control such as calls, meetings, hours working on specific projects etc.
- Encourage him/her to commit to his/her goals.
- Monitor his/her activity until you are certain that the habits are ingrained.

Encourage him/her to:

- Schedule weekly development interviews with him/her to discuss his/her progress, his/her goals and what he/she needs to do to keep on target.
- Prepare for each meeting with a review of his/her activities.
- Spend time advising him/her about what he/she is doing well before addressing growth opportunities.

Motivational Profile (Achievement Potential)



He/She balances the need to achieve with the need to provide services that he/she views as valuable to others.
He/She likes challenges but also likes to build good relationships.

Building Good Habits

- Challenge him/her to be sure that each day's critical activities are getting done.
- Set reasonable but challenging goals for him/her and stretch his/her goals gradually when he/she is meeting them consistently.
- If SAMPLE is working on licensing or training, make certain that all of his/her assignments are on-time while keeping his/her work to a high standard.

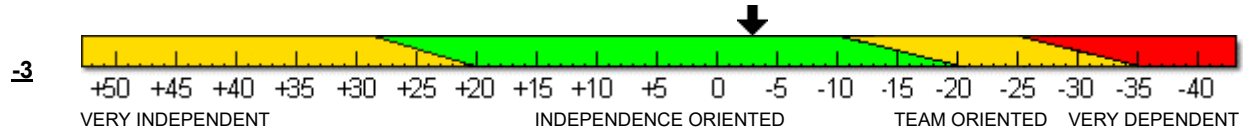
Building his/her Business

- Challenge him/her to meet or exceed his/her targets for the number of contacts each day.
- Work on balancing the quantity and quality of his/her presentations.
- Work on his/her sales process to make sure that the pace is suitable for the client or prospect.
- Be an expert in the products that are the best sellers and/or suitable for most clients.

Encourage him/her to:

- Test his/her progress.
- Provide him/her with interesting challenges.
- Get his/her mentor to test his/her knowledge and advise him/her on key areas to review and practice.
- If he/she is doing well in learning what he/she needs to learn, ask him/her for suggestions on how to get even better or ahead of schedule.
- Coach him/her on the effectiveness of his/her client presentations.

Independence (Independence Potential)



He/She is co-operative most of the time and independent when the situation calls for it. He/She will integrate well with most existing systems allowing him/her to be suitable for working independently in a modestly structured organization. Encourage him/her to develop this strength in the following ways:

Building Good Habits

- Help SAMPLE understand how the company's culture works so he/she can be an effective team member and take advantage of the support and structure provided by the organization.
- Encourage his/her resourcefulness when looking for new ideas.
- Encourage him/her to discuss what he/she has learned with other people who are in the company or going through the learning process.

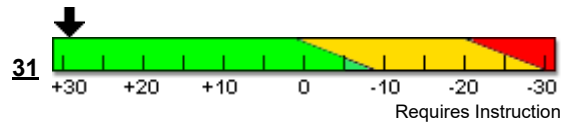
Building his/her Business

- Explain the company sales strategy but also consider other ways that he/she can build his/her referral network.
- Have him/her build good relationships with those who provide support within the organization.
- Encourage him/her to develop his/her self-management strengths so that he/she can work independently as he/she builds his/her business.

Encourage him/her to:

- Review new ideas with him/her rather than implementing them without discussing them.
- Challenge him/her to think of fresh approaches to the sales process and be prepared to review his/her ideas.

People Orientation



SAMPLE is very warm, sociable, cheerful and outgoing. He/She is motivated and energized by social interaction and able to build relationships and friendships without difficulty. He/She is quite comfortable with other people upon meeting them.

Building Good Habits

- Coach him/her to ask people about themselves and get them talking so that he/she can understand their needs.
- Help him/her enjoy the social aspects of a sales career and teach him/her how to build a rapport and look for referrals in social situations.
- Coach him/her on good listening skills.

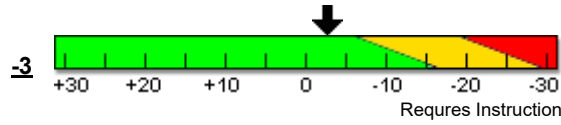
Building his/her Business

- Help him/her build his/her referral network by showing how much fun it can be.
- Provide community oriented strategies for meeting new people.
- Work on strategies to deal with rejection in the sales process because SAMPLE enjoys people and could take rejection personally.

Encourage him/her to:

- Review his/her presentation skills as necessary to assure that the business focus is still there.
- Make sure that his/her meetings with you deal with the business issues as well as relationship building.

Investigative Orientation



He/She is comfortable with a balance of technical and non-technical issues in his/her work. He/She enjoys some problem solving but a mixture of non-technical and technical issues would be most desirable. He/She has the approach to analysis that is common for sales people.

Building Good Habits

- Encourage him/her to set aside a regular time each day to review product knowledge and relevant business news.
- Coach him/her to focus on the essential knowledge first and then to delve into some of the more difficult material.

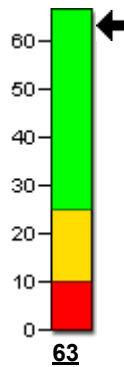
Building his/her Business

- Encourage him/her to practice his/her client approach so that he/she can deliver a 30 second version that will generate interest.
- Make sure that he/she knows the strengths and benefits of the products well enough to give a strong presentation and provide answers to most client questions.
- Familiarize him/her with the company's support network when you do not have an answer.

Encourage him/her to:

- Ask him/her to prepare a list of his/her technical questions in advance of his/her meetings and to share them with his/her mentor so that they can be addressed quickly at the meetings.
- Ask his/her mentor for advice on his/her presentations.

Self Directed (Confidence)



He/She would be considered to be very confident, in control and able to function effectively on his/her own. He/She accepts responsibility for his/her own performance and expects to succeed in his/her career and most other activities.

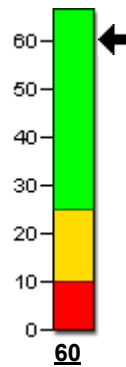
Building Good Habits

- Make him/her aware of his/her strengths (build conscious competence) and encourage him/her to use them as much as possible.
- Encourage him/her to continually build on the success that he/she has had so far.
- Coach him/her to take responsibility for his/her own actions.
- Coach him/her to take responsibility for his/her learning.
- Coach him/her to take control of what he/she can control and to do it to the best of his/her ability.
- Address his/her growth opportunities when he/she is feeling successful.

Coaching Strategies

- Always focus on his/her strengths and how to get even better.
- Address possible arrogance by asking him/her for suggestions on how to complement his/her strengths.

Lifestyle Management



He/She appears to manage his/her energy and lifestyle quite well. Pressure and the ability to cope with stress effectively may even enhance his/her performance in some situations.

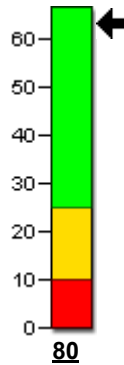
Building Good Habits

- Coach him/her to identify and understand his/her own stress coping techniques so he/she can use them in other situations.
- Coach him/her to continue to manage stressful situations as challenges that he/she can meet.
- Coach him/her to share his/her stress coping strategies with others.

Coaching Strategies

- If his/her colleagues are showing signs of stress, SAMPLE may be a suitable mentor.

Dealing with Call Reluctance



SAMPLE has the sort of attitude about prospecting, managing rejection and sales as a career that would be considered as suitable in almost any sales career. Generally speaking, he/she does not take rejection personally and should be very comfortable building his/her business.

Building Good Habits

- Take advantage of his/her comfort with prospecting and rejection by making a regular habit of prospecting.
- Ask him/her to commit to a number of contacts or calls that he/she is going to make each day and to start making them. This is a success habit that is hard to beat in sales.
- Focus on the high quality of the products and services that the company provides so that he/she feels comfortable with the value that he/she is providing to his/her prospects and clients.

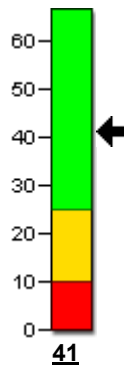
Building his/her Business

- Coach him/her to keep asking for a referral even if he/she doesn't expect one.
- Remember that a positive attitude is essential and building a successful market survey will help him/her prospect when building his/her business in the future.
- No one likes rejection but he/she is generally good at accepting it as non-personal. When people won't talk to him/her or help with his/her market survey it is more likely that they are worried about how their friends would react than rejecting him/her. Coach him/her on how to set clients at ease by demonstrating his/her good judgment and tact.

Encourage him/her to:

- Praise his/her strength in this area.
- Encourage him/her to be a mentor to others if it is appropriate.
- Brainstorm on finding additional strategies on how to prospect and deal with rejection.

Listening Style



SAMPLE is able to listen very effectively while in conversation with others. His/Her approach to listening is an asset while interacting with clients, peers or others.

A Guide to Helping

- Take advantage of his/her strengths as a listener when dealing with difficult clients as he/she may be able to gather information and gain trust where others have been unable to do so.

Coaching Strategies

- SAMPLE may be a role model for others in the fact finding or consultative sale.

CANDIDATE REPORT COACHING GUIDE

Sample Report



Build Success Habits and Build your Business!

#ESBMAX88UQL3
2019/09/03
SAMPLE SAMPLE

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Introduction

The purpose of this guide is to help you to continue maximizing your personal strengths as you develop your sales career. This report is based on the Personal Orientation Profile (POP™) questionnaire that you completed.

This Report is designed to:

Help you leverage your strengths by understanding them and developing success habits which will take advantage of your strengths throughout your career.

Career Management Planning

Most sales careers include 2 phases:

- Phase 1: Building Success Habits
- Phase 2: Building your Business

In some sales careers, the phases are clearly defined while in other careers there may not be such clear definitions but there will be personalized feedback in each phase to assist you in developing your sales career.

Phase 1: Building Success Habits

At the beginning of any sales career or when you start with a new organization, you will be required to do many things to be an effective sales representative. These will include some or all of the following:

- studying and taking courses to pass licensing examinations (if applicable)
- learning about the products and services that you will be providing
- developing relationships with your new manager(s) and colleagues
- understanding how to make use of the technical and business support people in the organization
- understanding your market and its needs

This report is designed to provide you with personalized coaching to help you during this phase where learning, building relationships and building success habits are essential.

Phase 2: Building your Business

Once you have been trained in the organization's products and sales methods, your responsibilities will change and your personal success will be more directly correlated with success of the organization. The success habits that you develop in Phase 1 will be very valuable in your ongoing success as you Build your Business.

Commitment and Growth

Fit to Sales Career

You are very well suited to competitive sales and have the attributes to make you successful in this field.

Self Coaching Strategies

- Use this report to identify your strengths and how to use them.
- Make a personal commitment to your sales career in order to take full advantage of your potential.
- Set high standards for yourself in terms of activity and results. You can control the activity and the results will follow if you keep working and improving your skill set.
- Outwork the competition

Work Well with your Manager/Mentor

- Meet regularly with your Manager/Mentor and use those meetings to learn what you are doing well and how to leverage your strengths.

Building Success Habits

You are very enterprising, competitive, determined and goal oriented. You have the potential to be very successful. During the period of your orientation and training, it will be important for you to build the type of success habits that you can carry throughout your career. As you start to grow your business we recommend that you consult with your Manager/Mentor on the daily and weekly habits that you will need to become successful.

Build Good Habits

- Set daily and weekly progress goals for yourself.
- Plan and record the plan for your daily activity (number of hours of study, meetings and other essential activities, etc.). By doing this, you will establish a habit of setting your goals.
- Commit to your plan and exceed your goals if you find that you have the time and energy.
- When hard work becomes a habit, the work gets easier, you become more effective and the financial rewards will follow.
- Reward yourself for keeping your commitments.

Product Knowledge/Certification

- If studying for a license or learning about the organization and its products, set daily goals for what you wish to achieve each day.
- Make certain that you set aside enough time to do your daily work. Take control.

Building Your Business

- Develop a consistent daily schedule and follow it until it is a regular habit.
- Decide upon a number of calls that you are willing to make each day and make them.
- Set goals for activities which you can control such as calls, meetings, hours working on specific projects, etc.
- Commit to your goals.
- Monitor your activity and reward yourself for completing all your calls and other activities.
- It is okay to feel guilty if you do not honor your commitments. If you are feeling guilty, determine why and re-work your daily plan.
- If you are doing market research or building a referral network, commit to a number of real contacts each day.
- Outwork the competition.

Working with your Manager/Mentor

- Schedule weekly development interviews with your mentor to discuss your progress, your goals and what you need to do to keep on target.
- Prepare for each meeting with a review of your activities.
- Advise your mentor about what you are doing well and seek out one or two growth opportunities.
- Integrate your mentor's feedback into your planning for the next week.

Motivational Profile

You balance the need to achieve with the need to provide services that you view as valuable to others. You like a demanding challenge but also like to build good relationships.

Build Good Habits

- Prepare a list of the day's critical activities.
- Challenge yourself so that each day's critical activities are getting done.
- Set reasonable but challenging goals for yourself and stretch your goals a little when you are meeting them consistently.

Product Knowledge/Certification

- Plan your activity so that all of your assignments are going to be on-time.
- Challenge yourself to get assignments done in advance while keeping your work to a high standard.
- Follow your study plan and design a scorecard to monitor your achievements.

Building Your Business

- Challenge yourself to meet and exceed your targets for the number of contacts each day.
- Work on balancing the quantity and quality of your presentations.
- Work on your process so that the pace is suitable for each client.
- Work on your sales process to make sure that the pace is suitable for the client or prospect.
- Be an expert in the products that are the best sellers and/or suitable for most clients.

Working with your Manager/Mentor

- Ask for advice on ways to test your progress.
- Ask for interesting challenges that will help you.
- Get your mentor to test your knowledge and advise you on key areas to review and practice.
- If you are doing well in learning what you need to learn, ask for suggestions on how you may get even better or ahead of schedule.
- Ask for coaching on the effectiveness of your client presentations.

Independence

You are co-operative most of the time and independent when the situation calls for it. You will integrate well with most existing systems. This makes you suitable for working independently in a structured organization. Develop this strength in the following ways:

Build Good Habits

- Learn how the company culture works so you can be an effective team member and take advantage of the support and structure provided by the organization.

Product Knowledge/Certification

- When faced with a difficult problem that you cannot solve, use your resourcefulness to explore other possible solutions.
- Discuss what you have learned with other people who are in the company or going through the learning process.

Building Your Business

- Follow the guidelines provided by the company and your mentor but think about other ways you can build your referral network. Integrate new ideas into your approach to selling.
- Build good relationships with those who provide support within the organization.
- Develop your self-management strengths so that you can work independently as you build your business.
- Use your independent nature to develop fresh approaches to the sales process

Working with your Manager/Mentor

- Try out new ideas with your mentor before using them as there may be some refinements that you have not considered.
- Develop your relationship with your manager and ask for weekly development interviews.
- Challenge yourself to think of fresh approaches to the sales process and ask your manager to review your ideas.

People Orientation

You are very warm, sociable, cheerful, friendly, enthusiastic and outgoing. You are motivated and energized by social interaction and able to build relationships and friendships without difficulty being quite comfortable with other people upon meeting them.

Build Good Habits

- Ask people about themselves and get them talking so that you can understand their needs.
- Enjoy the social aspects of a sales career to build rapport and referrals.
- Be a good listener.

Product Knowledge/Certification

- You may find working on your own somewhat difficult, so schedule some time to socialize so that you don't feel trapped by your training program. Enjoy these times but do not let yourself fall behind schedule.

Building Your Business

- Enjoy rapport building and meeting new people as you build your referral network.
- Be community oriented and active socially so that you keep meeting new people.

Working with your Manager/Mentor

- Ask for regular development meetings where you can review your work.
- Ask for feedback on your presentation skills.
- Make sure that your meetings with your Manager/Mentor have a significant business focus as well as relationship building.

Investigative Orientation

You enjoy some problem solving but a mixture of non-technical and technical issues would be most desirable. You have the approach to analysis that is common in successful sales people.

Build Good Habits

- Develop good relations with colleagues who can provide support on more technical or unusual issues.
- Spend time every day reviewing products and relevant business news. Make it a habit.

Product Knowledge/Certification

- Focus on the essential knowledge first and then delve into some of the more difficult material.
- Understand the 'big picture' before focusing on the technical details.

Building Your Business

- Practice a prospect approach that you can deliver in either 30 or 60 seconds.
- Work on your listening skills to learn what your contacts are thinking.
- Resist the urge to explain things if people do not seem interested.
- Ask questions and listen carefully to the answers to find what the prospect needs and give the information that meets those needs.
- Continuously edit your presentation so it will cover the essentials and leave enough time for the client's questions.
- Learn to pay attention to your prospect's interest level as you present.
- Pay attention to 'buy signals' and close rather than continue selling.

Working with your Manager/Mentor

- Prepare a list of your technical questions in advance of your meetings and share them with your mentor so that they can be addressed quickly at your meetings.
- Ask your mentor for advice on your presentations.

Self Confidence

You would be considered to be very confident, in control and able to function effectively on your own. You accept responsibility for your own performance and expect to succeed in your career.

Build Good Habits

- The best way to maintain your feelings of being capable (which reflect confidence) is to be aware of your strengths (build conscious competence) and use them as much as possible to get things done.
- Build on the success that you have had so far as success builds confidence.
- Take responsibility for your own actions.

Label

- Reflect on your success when you understand a product well or have completed a study module successfully.
- Take responsibility for your learning.

Building Your Business

- Take control of what you can control and do it to the best of your ability.
- Take responsibility for your own actions.
- Build awareness of what you do well (conscious competence) and do it often.
- Address your growth opportunities only when you have been successful doing what you do well.
- In each contact meeting focus on your strengths and use them most often.
- Be aware of growth opportunities and address them when you are feeling good about a successful contact meeting or some other personal strength.

Working with your Manager/Mentor

- Ask your coach for feedback on your strengths and how to get even better
- Ask for recommendations on where you could complement your strengths.

Lifestyle Management

You appear to manage your energy and deal with stress quite well. You will be able to work to deadlines and manage difficult situations and demanding users without suffering the negative effects of stress. Pressure and the ability to cope with stress effectively should even enhance your performance in challenging situations.

Build Good Habits

- Identify and understand your own stress coping techniques so you can use them in other situations.
- Continue to manage stressful situations as challenges that you can meet.
- Share your stress coping strategies with others.
- Good diet and exercise strategies will help you continue to manage your energy effectively.

Product Knowledge/Certification

- If your colleagues are showing signs of stress, offer to help through your manager.

Dealing with Call Reluctance

You have the sort of attitude about prospecting, managing rejection and sales as a career that would be considered as suitable in almost any sales career. Generally speaking, you do not take rejection personally and should be very comfortable Building Your Business.

Build Good Habits

- Your comfort with prospecting and rejection should be turned to your advantage by making prospecting a regular habit. Determine how many contacts or calls that you are going to make each day and start making them. Let people know about your new job and ask for future referrals.

Product Knowledge/Certification

- Focus on the high quality of the products and services that your company provides so that you will feel comfortable with value that you are providing to your prospects and clients.

Building Your Business

- You are comfortable prospecting and should have great success in turning the Building Your Business process into future business by calling your referrals and thanking those who referred you or who gave you referrals.
- No one likes rejection but you are good at accepting it as non-personal. Some of your contacts may not feel comfortable providing a referral but try to get one by showing your diplomacy and tact.
- Expect each contact to be successful, even if it is just the fact that you made the effort.

Working with your Manager/Mentor

- Review your strengths with your mentor and offer to be a mentor to others if it is appropriate.
- Ask your mentor for additional strategies on how to deal with rejection.

Listening Style

You demonstrate the potential to listen very effectively while in conversation with others. You are likely to listen to others attentively which will enable you to better understand and relate to others. Your approach to listening should help you in developing good interpersonal relationships with a variety of individuals that you will encounter. People who listen well can be very effective sales people because good listeners assure the client that they are being heard.

Your approach to listening is an asset while interacting with clients, peers or others.

Self Coaching Strategies

- Take advantage of your strengths as a listener when dealing with difficult clients as you may be able to gather information and gain trust where others have been unable to do so.

Work Well with your Manager/Mentor

- Your manager or mentor should appreciate you being a good listener. Keep it up.