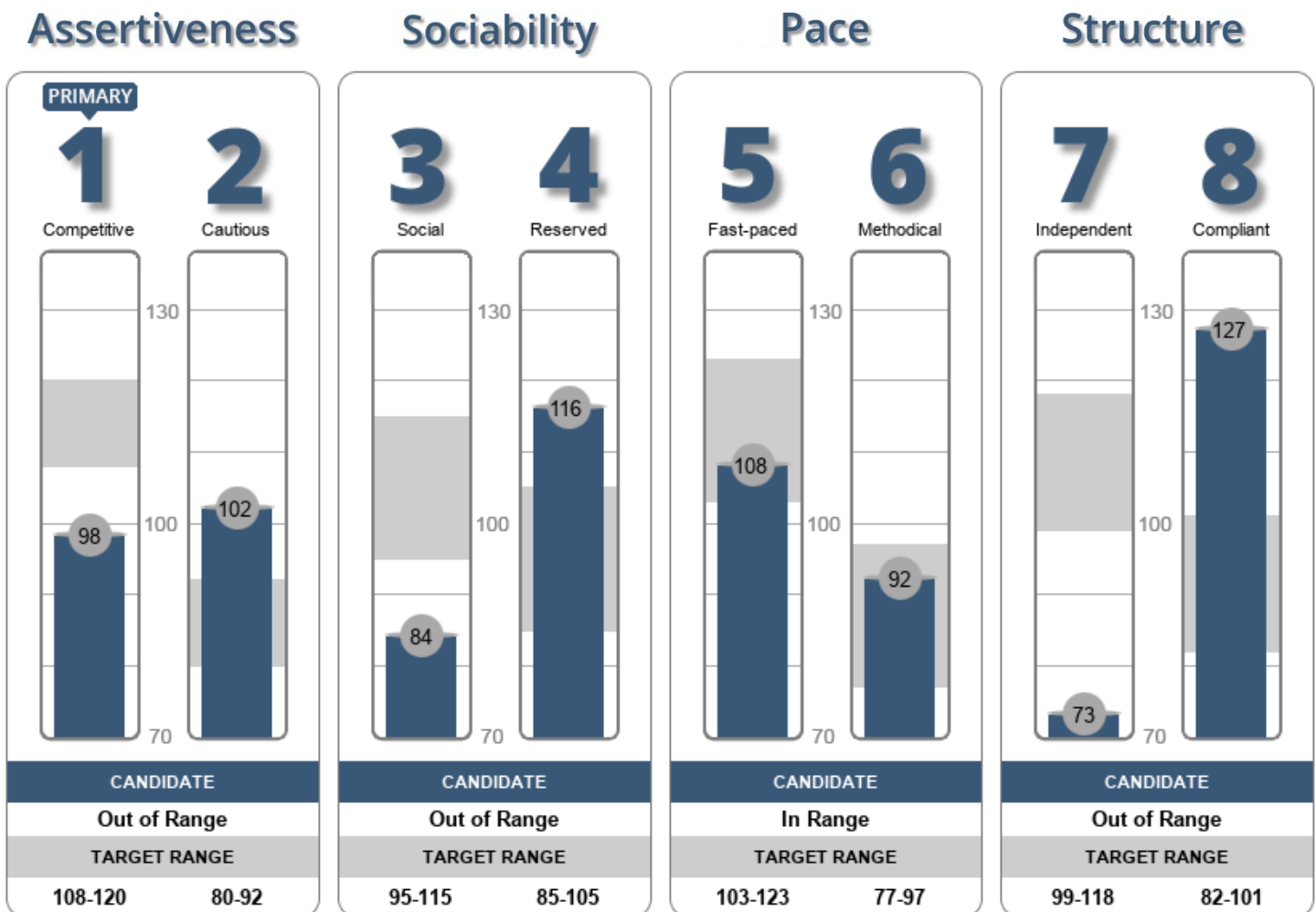


Client Name: Omnia Report Samples  
 Client Number: 20-SAMPLES  
 Candidate Name: Sam Sample  
 Job Target: Producer  
 Target Number: 220245  
 Profile Number: 1584860WB  
 Report Date: April 4, 2022  
 Dept./Div.: Insurance  
 Compatibility Rating: Low

### Rating Summary:

The candidate scored LOW compared to your Job Target. This occurs when the behavioral traits (Columns 1 – 8) and/or the performance measures (Energy, Perspective, Intensity) do not fall within the Target Range.

A low rating also occurs when the primary column falls below the Target Range even if all other columns are in range. Significant management concerns may exist to explore further during the interview process.



Client Name: Omnia Report Samples

Client Number 20-SAMPLES

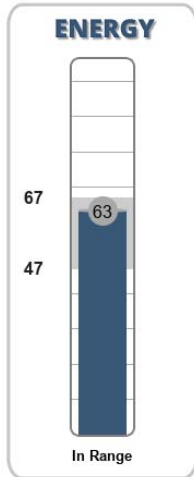
Candidate Name: Sam Sample

Job Target: Producer

Profile Number: 1584860WB

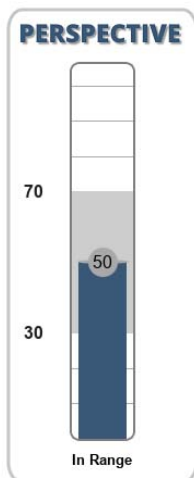
Target Number: 220245

## COMPARISON TO TARGET



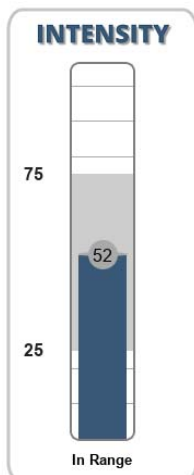
The candidate selected an average number of words on the assessment.

An in-range Energy score suggests an ability to efficiently process information and adequate stamina for a typical workweek.



An in-range Perspective score suggests considerate, consistent and predictable behavior.

The candidate's performance should reflect appropriate reactions to stress and decisions that demonstrate considered forethought.



Intensity measures the strength of an individual's personality traits.

An in-range score indicates the candidate has clearly defined personality traits and good focus. It should be possible to identify workplace needs and effective motivational strategies.

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Client Number: 20-SAMPLES

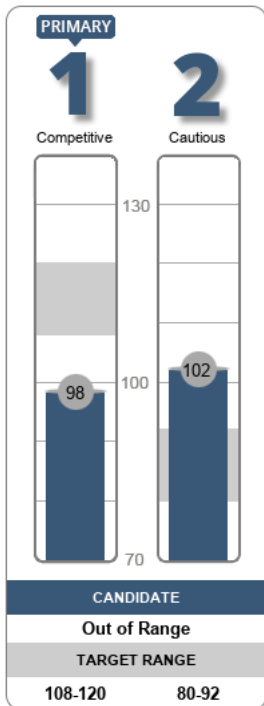
Candidate Name: Sam Sample

Job Target: Producer

Profile Number: 1584860WB

Target Number: 220245

## COMPARISON TO TARGET

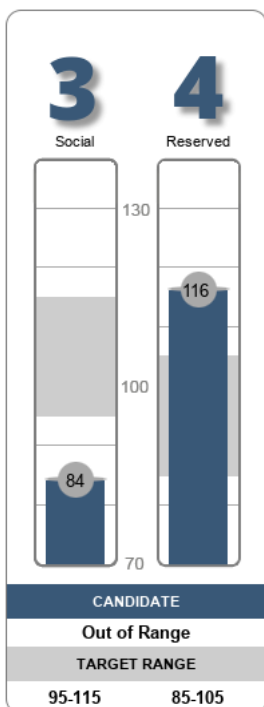


This candidate scores above the target range for caution. **Summary:** Participant is less proactive, more cautious than the target insurance producer.

**Strengths:** Supportive, collaborative, a service-driven team player. Willing to focus on customers' needs. May win people over with a helpful, accommodating attitude.

**Challenges:** Column 1 is the primary behavioral column for this position; it indicates assertiveness and a likelihood to be motivated by commission-based pay. Since this candidate's column 1 is below the target range, you are apt to see some discomfort with at-risk compensation and less innate drive to overcome objections and make sales. This person could find it difficult to compete against top performers, make assertive suggestions to prospects or customers, take charge of sales situations, ask for a commitment, and negotiate the terms of the sale.

**Action Plan:** Role-play to determine if there is enough assertiveness and persuasiveness, and confirm comfort working on commission and under quotas. If you proceed, offer this candidate support when it comes time to close a deal. Coach on negotiation, identifying buying cues, and working around objections/hesitation. Help this producer practice asking for a sale and handling assertive customers who expect unreasonable concessions.



This candidate scores above the target range for pragmatism. **Summary:** Participant is more analytical, less social than the target insurance producer.

**Strengths:** Consultative, analytical. Strong needs assessor, listener, and problem solver. Factual, specific communicator. Should comfortably answer questions about insurance options. Gives tailored, informative sales presentations.

**Challenges:** Can be reserved in social situations, but with a tall column 1, can still be assertive and proactive when selling. Could find it challenging to establish rapport with prospective customers and may rely more on dry facts than emotional appeals to convince. Could seem quite serious when speaking with prospects and customers. A very tall column 4 can indicate an overly direct or blunt communication style and a tendency to be perceived as too serious or distant.

**Action Plan:** In the interview, listen for good communication and rapport-building skills. Coach on ways to approach and establish rapport with prospects and customers. Might be more comfortable focusing on e-mail inquiries. Keep feedback objective and in line with this individual's no-frills, fact-driven outlook.

Client Name: Omnia Report Samples

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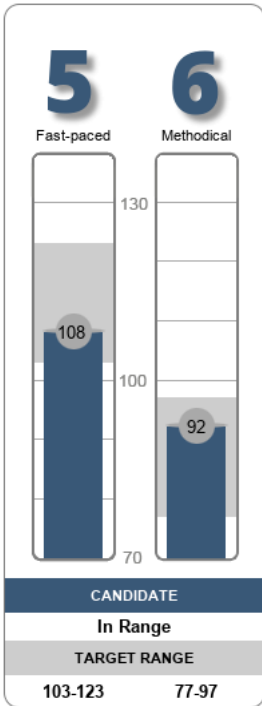
Candidate Name: Sam Sample

Job Target: Producer

Profile Number: 1584860WB

Target Number: 220245

## COMPARISON TO TARGET

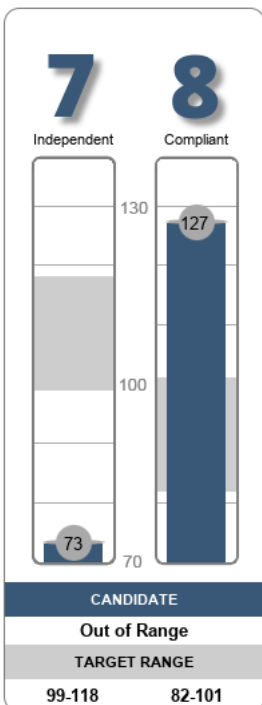


This candidate falls within the target range for pace. **Target Range:** Column 5 should be taller than or nearly equal to column 6.

Column 5 measures the sense of urgency to accomplish goals and the comfort with multitasking. A tall column 5 candidate should exhibit a time-sensitive pace, a determination to close sales quickly, and an ability to comfortably handle a high volume of appointments on busy days. You should see a good ability to adapt quickly to change and field interruptions.

If column 5 is on the higher end of the range, the candidate may show signs of impatience and could struggle to follow up. Tracking tools would remind the individual to check in with promising but slow-to-develop leads.

When columns 5 and 6 are similar in height, the individual can still be time sensitive and feel comfortable multitasking or responding to interruptions but should show some patience when working with indecisive customers.



This candidate scores above the target range for structure. **Summary:** Participant is more structured, less independent than the target insurance producer.

**Strengths:** Detailed, structured, compliant, and accommodating; strong need for exactness. Willing to learn and follow company procedures and apply management advice. Can produce accurate administrative results and provide high-quality service.

**Challenges:** Sensitivity to sales rejection could negatively impact confidence. This candidate might not be self-assured when making sales suggestions, especially if the prospect seems reluctant. Could react defensively or lose confidence if a customer does not buy. May seek a lot of reassurance from management. Likely to depend on established procedures when having to make decisions. When faced with something unfamiliar, this candidate could second-guess decisions and lose course with the sale.

**Action Plan:** Coach on overcoming objections and rebounding from rejection. Offer an effective step-by-step sales formula to use as a starting point. Make sure the candidate can remain confident even when reluctance is apparent. Watch for any tendency to get defensive in negotiations. In the beginning, this individual could need significant guidance and structure. Arrange for regular meetings to discuss strategy, offer feedback, and provide diplomatic advice. If you must point out a problem or error, do so tactfully and discreetly.

Client Name: Omnia Report Samples

Client Number 20-SAMPLES

Candidate Name: Sam Sample

Job Target: Producer

Profile Number: 1584860WB

Target Number: 220245

## CANDIDATE'S KEY TRAITS

This summary is based on the highest of the 8 columns. This page is **ideal for use with employee coaching**.

Balance of assertiveness and caution. This candidate should be comfortable showing initiative in safe or familiar situations and managing some conflict. Candidate is not aggressive or confrontational but should take proactive steps to accomplish goals/tasks. Should make suggestions without pushing. Generally, puts equal priority on team and individual goals. Tends to set realistic objectives.

Reserved by nature, this candidate likely appreciates tasks that require a solitary, analytical effort. This candidate may prefer working alone to working in group settings. In team settings, excels at providing or receiving information. Strives to analyze situations without being influenced by personal feelings. Likely to be a logical problem-solver. Can be skeptical; not one to immediately accept superficial appearances. Appreciates objective, fact-based feedback.

A relatively fast-paced candidate who prefers variety and change to routine and repetition. Comfortable with time-consuming tasks but may need to break them down into a series of short-term goals to feel a sense of regular accomplishment. Strives to get things done quickly; should be comfortable with pressing deadlines, new priorities, and change. More likely to stay motivated when handling a variety of responsibilities. Too much routine and repetition could eventually frustrate this candidate.

Meticulous, compliant individual who appreciates a structured work environment. Concerned about following established procedures. Wants to make decisions in line with company/managerial expectations; could be very uncomfortable making decisions in new or unfamiliar situations without the aid of guidelines or precedent. Strives for precision, cooperation, and organization. Closely checks over work before letting it go. Likely to take personal responsibility for any mistakes; potentially very sensitive to criticism. Looks for regular management feedback and support, especially when handling new responsibilities.

Client Name: Omnia Report Samples

Client Number: 20-SAMPLES

Candidate Name: Sam Sample

Job Target: Producer

Profile Number: 1584860WB

Target Number: 220245

## DEVELOPMENT INSIGHT

The following sections provide an overview of the behavioral characteristics and preferences when a participant falls within the Target Ranges.

### COMMUNICATION STYLE

#### If your candidate has a tall:

**Column 1:** Assertive, proactive communicator.

**Column 2:** Cautious, low-key communicator.

**Column 3:** A candidate with a tall column 3 is an expressive communicator who builds relationships easily. This individual favors working with people and can smooth over contentious situations with diplomacy and empathy. This person enjoys gathering others' advice and talking through problems or issues.

**Column 4:** A tall column 4 indicates a straightforward, business-focused communicator. This individual is socially reserved and keeps conversations on point. This person might listen more than talk and is likely to provide specific data and facts when explaining or supporting an idea/analysis. Though not unfriendly, this participant needs time to establish rapport with new people.

**Column 5:** Speaks quickly; can jump around, especially with a tall column 3.

**Column 6:** Speaks deliberately, doesn't rush.

**Column 7:** Speaks confidently but could gloss over/miss necessary details.

**Column 8:** Speaks specifically, very through, uses details.

Client Name: Omnia Report Samples

Client Number 20-SAMPLES

Candidate Name: Sam Sample

Job Target: Producer

Profile Number: 1584860WB

Target Number: 220245

## DEVELOPMENT INSIGHT

### STRENGTHS

#### If your candidate has a tall:

**Column 1:** Competitive, assertive, strong sales aptitude, addresses problems directly and takes charge of situations, goal driven, comfortable with risk, exhibits confidence.

**Column 2:** Supportive, service oriented, collaborative, cautious about taking risks.

**Column 3:** Socially engaging, creative problem solver, intuitive, persuasive verbal communicator, influential.

**Column 4:** Task focused, comfortable concentrating on solitary matters such as collecting and researching data, communicates with facts and proof, consultative sales style.

**Column 5:** Brisk paced and flexible, acclimates easily to changes, multitasking, time sensitive.

**Column 6:** Patient and persistent, does not become easily bored by tedious or repetitive assignments, consistent, systematic worker.

**Column 7:** Resilient, can brush off rejection. Decisive, self-managing, does not get bogged down by insignificant details, deals well with ambiguity, meets challenges with resourcefulness.

**Column 8:** Respectful of policy/authority, focused on precision, attentive to details, meticulous work habits, applies feedback to improve performance.

### CHALLENGES

#### If your candidate has a tall:

**Column 1:** Working collaboratively on team projects/goals, could overstep position boundaries and communicate too forcefully with prospects/colleagues.

**Column 2:** Asking for the sale, pushing past objections, negotiating firmly, taking initiative outside of job parameters, taking the lead on assignments, managing conflict.

**Column 3:** Focusing on data-intensive tasks, potential to become distracted by social opportunities.

**Column 4:** Building rapport with customers. Could come across as blunt or direct.

**Column 5:** Persisting through time-consuming deals and a lengthy sales cycle, working within a strict routine.

**Column 6:** Adjusting to abrupt changes and interruptions, handling multiple tasks simultaneously.

**Column 7:** Closely following procedures that leave little room for innovation, strict management and unwavering procedures.

**Column 8:** Sensitive to rejection; turndowns could negatively impact confidence. Working with minimal direction or guidance, making decisions in unfamiliar areas, managing criticism.



Client Name: Omnia Report Samples

Client Number 20-SAMPLES

Candidate Name: Sam Sample

Job Target: Producer

Profile Number: 1584860WB

Target Number: 220245

## DEVELOPMENT INSIGHT

### PACE

#### If your candidate has a:

**Tall column 5:** Fast paced. A candidate with a tall column 5 can function at a quick tempo and attend to multiple sales activities at once. This individual wants to handle tasks rapidly and feel a sense of accomplishment often. Tight deadlines and schedule changes do not overwhelm this person; rather, this candidate favors shifting gears throughout the day.

**Tall column 6:** Methodically paced. An individual with a tall column 6 is persistent, works at a deliberate tempo, and prefers finishing one task before starting another assignment. This person will not rush when working with indecisive prospects, following up on slow-developing leads, or performing other activities that require patience.

**Balance of columns 5 and 6:** Evenly paced. Candidates with equal columns 5 and 6 can alter their tempo based on current needs. These individuals are most efficient when given a little notice about changes in order to prepare for them but can handle a few tasks at once.

### ATTENTION TO DETAIL

#### If your candidate has a:

**Tall column 7:** Low attention to detail. Candidates with a tall column 7 are big-picture oriented and focused on end results rather than the details or the processes used to reach those results. This person does not get caught up in minor issues but might inadvertently overlook mistakes. This candidate works best when focused on closing deals versus completing sales paperwork and other tracking or administrative responsibilities.

**Tall column 8:** Strong attention to detail. Candidates with a tall column 8 focus on particulars and processes. This individual is naturally detailed and conscientious about precision. This participant wants clear procedures to follow in order to minimize the risk of making errors or omissions. This person is apt to double-check sales paperwork to ensure it is accurate.

**Balance of columns 7 and 8:** Moderate attention to detail. A candidate with columns 7 and 8 that are similar in height is equally attentive to important details and the overview. This person is quality conscious without being a perfectionist. Also, this individual appreciates the leeway to make decisions independently as well as resources to consult in unusual or unfamiliar areas.



Client Name: Omnia Report Samples

Client Number 20-SAMPLES

Candidate Name: Sam Sample

Job Target: Producer

Profile Number: 1584860WB

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## DEVELOPMENT INSIGHT

### MOTIVATIONAL STRATEGIES

**If your candidate has a tall:****Column 1:** The chance to earn individual incentives, challenging goals, incentive-based pay, bonuses, continued growth.**Column 2:** Security; a cooperative, noncompetitive environment; low-risk goals; a stable pay structure.**Column 3:** Informal, upbeat atmosphere; opportunities to interact with people; public recognition.**Column 4:** Constructive, task-relevant feedback; chances to enhance job expertise and skills.**Column 5:** Varied tasks, experiencing a sense of accomplishment often, a dynamic environment.**Column 6:** Routine and organization, forewarning about deadlines or priority shifts, consistency.**Column 7:** Autonomy, having a hand in developing plans and goals directly related to the job.**Column 8:** An accessible manager, established processes, clear expectations, diplomatic feedback.

### DEMOTIVATORS

**If your candidate has a tall:****Column 1:** No chance to earn individual rewards or incentives, working behind the scenes, no individual goals, lack of growth in job or organization.**Column 2:** A competitive work environment, confrontation and conflict, at-risk compensation.**Column 3:** Socially isolating work, lack of verbal or visible recognition for contributions.**Column 4:** No downtime from extensive people contact, subjective performance evaluations.**Column 5:** Unvarying routine, predictability, lengthy projects that require a great deal of follow-up.**Column 6:** Frequent interruptions and alterations to priorities, disorder, abrupt due dates.**Column 7:** Having to consult management before making minor decisions, lack of innovation.**Column 8:** Receiving no feedback or support, vague direction, lack of resources, harsh critiques, rejection.

Client Name: Omnia Report Samples

Client Number 20-SAMPLES

Candidate Name: Sam Sample

Job Target: Producer

Profile Number: 1584860WB

Target Number: 220245

## DEVELOPMENT INSIGHT

### ACTION PLAN

#### If your candidate has a tall:

**Column 1:** Set individual objectives, and reward for individual sales success. Make sure the candidate knows when to take a low-key approach. Coach on collaboration, service, and communicating diplomatically.

**Column 2:** Increase goals and expectations gradually. Offer support during contentious or ambiguous situations. Coach on negotiation, assertiveness, overcoming objections, and closing tactics.

**Column 3:** Provide public recognition. Coach on building active-listening skills and asking questions to discern prospects' and customers' needs.

**Column 4:** Provide task-relevant feedback, and ensure this individual knows job expertise is respected. Coach on building rapport, making a personal connection with customers, and speaking persuasively.

**Column 5:** Give a diverse array of assignments. Focus this candidate on tasks that can be completed quickly. Coach on time-management, organization, and following up on outstanding leads.

**Column 6:** Advise about deadlines in advance so this individual can prepare for them. Assign long-range activities that benefit from persistence. Coach on multitasking and adapting to change.

**Column 7:** Offer freedom to self-direct as long as expectations are met and critical protocols are followed. Coach on reviewing work for accuracy and recognizing and correcting mistakes.

**Column 8:** Offer a specific sales process to follow. Give feedback discreetly and tactfully. Be available to provide direction when necessary, but coach on making decisions self-sufficiently and brushing off rejection.



Client Name: Omnia Report Samples

Client Number: 20-SAMPLES

Candidate Name: Sam Sample

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## SUPPLEMENTAL QUESTIONS

The following behaviorally-based questions are a supplemental tool we provide to help you better evaluate the candidate. They are not a substitute for your standard set of interview or professional development questions, but can provide additional, helpful information or prompt conversation.

1. Do you prefer to follow a structured sales formula or to have fewer, less specific guidelines? Why?

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2. How do you decide what your priorities are each day? Give an example of a time you effectively established your priorities and a time when you did not.

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3. How do you get to know the key players in your territory? Talk about ways in which being a good relationship builder has contributed to your success.

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4. If you had to choose one quality as your most outstanding characteristic, what would it be? Why?

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5. What is the most aggressive action you have taken to secure a sale?

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6. What sort of behavior do you think would turn off a potential client?

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