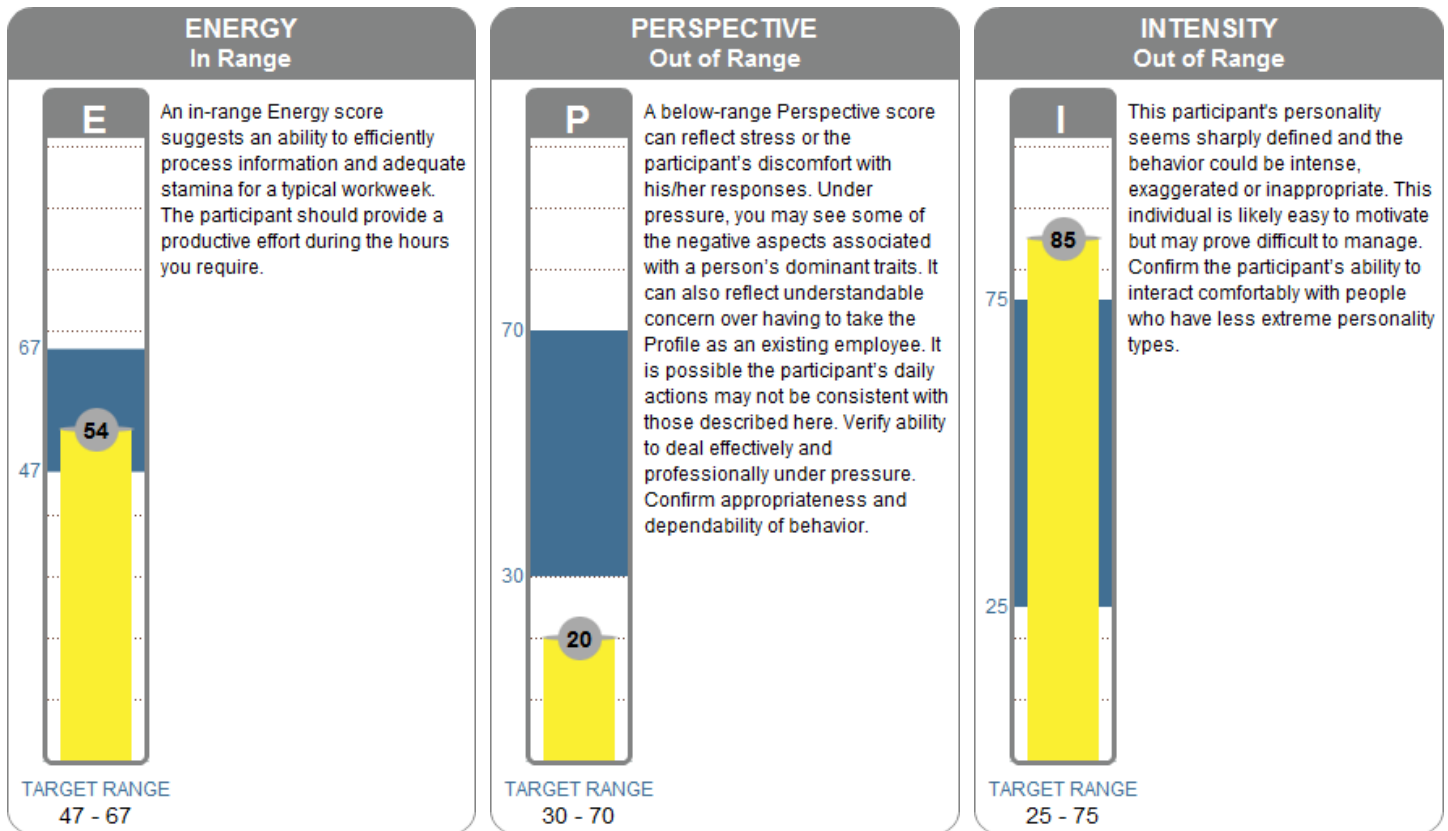




Client Name: The Omnia Group Inc  
Participant Name: Sara Sample  
Profile Number: 966505WB

Client Number: 11-36  
Job Target: Insurance Producer  
Target Number: 205101

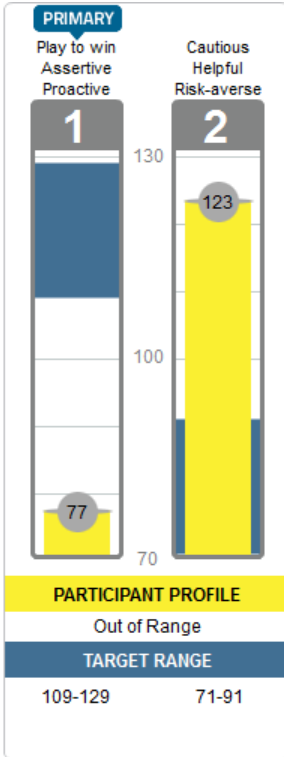
## COMPARISON TO TARGET



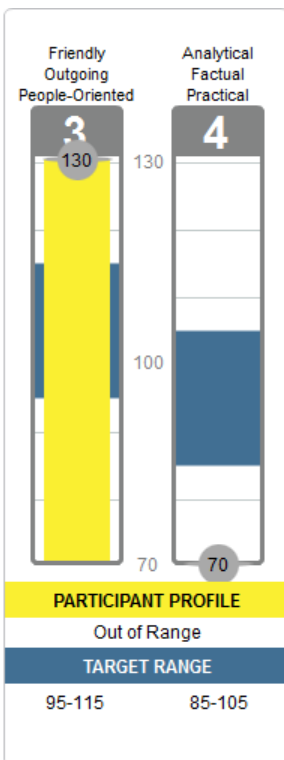
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 Job Target: Insurance Producer  
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## COMPARISON TO TARGET



The applicant is more cautious, careful, and risk-avoidant than your target Producer. He/she may not be as motivated by your pay incentives and may be less comfortable exerting buying pressure on a prospective customer in order to get a commitment. The candidate may be content with average sales numbers rather than being driven to be the best salesperson in your market. If column 2 is taller than column 1, this individual may be uncomfortable cold-calling, making assertive suggestions, and asking for the sale. An extremely tall column 2 (120 and above) could indicate a lack of ordinary self confidence in unfamiliar situations or around competitive people such as other Producers. We have identified column 1 as the primary behavioral column for this position. Thus, even if a candidate fits every other category in your Target, his chances for success in this sales position may be significantly reduced. If you hire, emphasize the servicing aspects of the job when setting goals for him, as he enjoys having the opportunity to be of service to others. Make sure he knows he can easily get assistance, guidance or reliable resources when he encounters any problems or challenges on the job. Pair him with an aggressive closer for training.

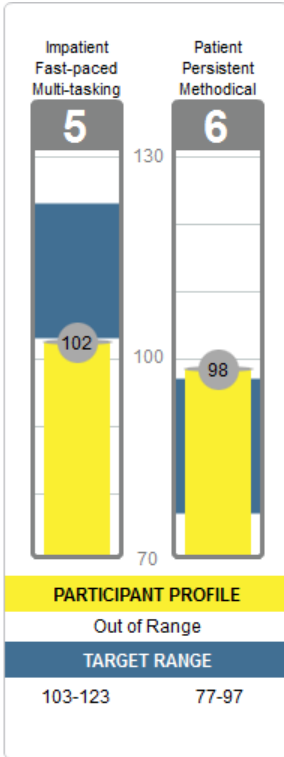


The candidate is more people-oriented than your target Producer. He/she may seem upbeat and persuasive, but listening skills could be weak. He is highly enthusiastic and concerned about projecting a favorable image about your organization, but also more likely to rely heavily on relationship-building skills than facts, data or statistics about your insurance services. If column 3 exceeds 120, this person is very socially-focused, so he could have difficulty keeping conversations with client centered on business, even after a solid relationship has been established. May not be inclined to evaluate particular client insurance/business needs and tailor the sales presentation accordingly. Extremely tall columns 3 and 7 may indicate a tendency to extend unrealistic claims or promises in an effort to seem impressive or to close a sale. Provide a script with specific questions that would allow him to learn/evaluate what the customer is really looking for. Periodically, remind him that clients will respect and appreciate him more as a good businessman and a trustworthy partner if he does not make promises he cannot keep.

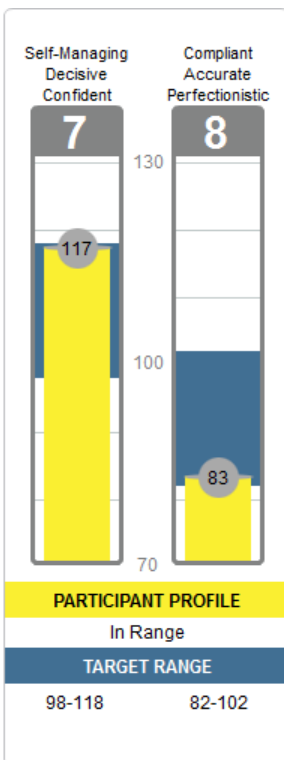
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## COMPARISON TO TARGET



The candidate is slower paced, more methodical and less comfortable multi-tasking, improvising or being expected to meet tight deadlines than your target Producer. If column 6 is only slightly higher than the control group's (up to 105) the applicant is only slightly more patient than your top performers and could still be effective in this role. However, as column 6 increases the candidate's pace diminishes. If column 6 becomes significantly higher than the Target's column 6, the candidate probably has the patience to follow up on leads that couldn't be closed on the first couple of calls, but he/she lacks the sense of urgency for getting a sale as soon as possible that we see in your top salespeople. If col. 6 exceeds 115, this individual may make mistakes or get rattled when rushed, and could be thrown by interruptions or deviations from a set routine. Could find the blistering pace and task variety found in the typical day of salesperson very upsetting. Remind him of the importance of prioritizing the most important steps in the sales process so that he does not lose sight of deadlines. Be prepared to give him some time to settle into a routine before expecting them to perform at peak efficiency.



Column 7 should be taller than or equal to column 8, which represents an ability to make independent decisions, a willingness to self-manage, results-orientation and the confidence to cope with rejection. Salespeople with a tall column 7 can take an unconventional approach in a sales situation in order to get the order. There is an awareness of, and a comfort with, the idea that the client may tell them "no" - they pursue every lead as if they know they will get a "yes" eventually. Some column 8 is desirable, as this indicates a willingness to follow rules, procedures and policies, as well as some attention to details.

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## COLUMN 3 GREATER THAN COLUMN 1

Column 3 is significantly higher than column 1 in this individual's Profile. This means that his/her need to maintain friendly relations with other people is greater than his/her competitiveness, ability to behave assertively in difficult situations, and determination to do what it takes to reach ambitious business goals.

In a sales role, this suggests the individual may be uncomfortable asking a reluctant prospect for the sale or exerting buying pressure in order to get the close. In a management position, the candidate might have difficulty making unpopular but necessary decisions, evaluating worker performance objectively, and confronting under-productive personnel when less direct tactics do not get results.

In some cases, an individual may fall within all ranges, but still have a taller column 3 than column 1. This reduces the compatibility rating.

You may choose to proceed with this individual if you can independently verify previous hard negotiation or sales success.

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## PARTICIPANT'S KEY TRAITS

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

Highly cautious, reactive, and risk-avoidant individual. Much more likely to be helpful and supportive than authoritative and demanding. For the most part, goals are likely to be conservative. May find it difficult to deal with even moderate adversity or confrontation on his/her own; at times, could come across as timid. Potentially uncomfortable showing initiative especially in unfamiliar situations, but this person's confidence can probably grow as his/her experience grows.

Extremely sociable, optimistic, and upbeat individual. A "natural" speaker, motivator, promoter, or networker; probably not a natural listener. Will generally rely much more on emotion than on detailed or technical information to persuade. Has a very strong need to work with people; may find it quite difficult to focus on tasks that require a solitary effort. Concern for maintaining a favorable image is likely to be very strong; at times may have to make an extra effort to prevent enthusiasm from becoming exaggeration. Probably not a highly analytical or technically-minded individual; likely to rely heavily upon instincts when evaluating situations or devising strategies. More subjective than objective. Motivated by public praise, titles, status symbols.

An evenly paced individual who deals well with both routine and change. Can work patiently and persistently on tasks that can't be completed quickly; can also sprint to finish short-term projects. Probably appreciates some notice of deadlines and change, but is not likely to be unusually frustrated by unexpected new priorities, timetables, or other circumstances requiring him/her to make adjustments.

Very independent decision-maker who likes doing things his/her way. Not necessarily a rules-bender, but does not want to feel controlled. Has a strong preference for general guidelines as opposed to strict, explicit rules. May be good at envisioning new ways for reaching goals. Need for regular management guidance is likely to be low unless he/she has a significant lack of knowledge about a particular situation. Deals relatively well with criticism. Much more concerned about results than processes; not naturally attentive to details or organized. May have to make an extra effort to maintain quality and motivation when handling tasks such as paper/processing work. Prefers an informal/unstructured work environment.

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## DEVELOPMENT INSIGHT

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

### COMMUNICATION STYLE

It varies, depending on the height of columns 3&4. With a tall column 3, the communication style will be very dynamic, upbeat, and enthusiastic. If you see that column 4 is similar in height to or slightly taller than column 3, you should see more of a tendency to be straightforward and direct with other people. All salespeople should be able to confidently approach prospective clients and deliver a persuasive sales pitch.

### STRENGTHS

Confidence, initiative, and the drive to find a way to gain each prospect's business. Your target is comfortable selling in a competitive market, eager to maximize commission earnings, and willing to be held accountable for individual sales results. You should see an ability to build strong relationships within the business community, as well as with prospective clients. There is also a good ability to evaluate client needs and key business issues. They possess a good ability to improvise, persuade (via emotion or facts), and directly ask for the sale. Should take a prospect's initial "no" as a "maybe" and continue to pursue that potential client's business. Additional strengths include a sense of urgency for converting leads to sales, a determination to seek out new business opportunities, and an ability to handle deadlines, interruptions, and multiple leads at one time.

### CHALLENGES

A salesperson with a very tall column 1 (near the top of the range) could be overly assertive in pursuing a close. A producer with a very tall column 5 may rush the close and initiate too many leads/projects at one time. A column 7 near the top of the target range flags a very independent individual; he/she could be somewhat challenging to manage due to his autonomous nature, and his organizational skills and accuracy in documentation may be weak.

### PACE

Brisk (column 5 slightly higher than 6) to very fast (very tall column 5). The taller the column 5, the faster the pace. These salespeople should want to close sales quickly and move on to the next lead. They should strive to make as many contact calls per day as possible.

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## DEVELOPMENT INSIGHT

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### ATTENTION TO DETAIL

Fair (columns 7&8 nearly equal) to weak (high column 7). Should be able to answer specific questions about your insurance products and services, but a salesperson with a tall column 7 is not a naturally meticulous individual. He/she will be more focused on the "big picture" (closing sales) than on details and processes (servicing accounts post-sale or handling any paperwork). If the salesperson's column 8 is about as tall as or taller than the column 7, you are likely to see stronger attention to details and organizational skills.

### MOTIVATIONAL STRATEGIES

Commission, achievement, career growth, winning, new challenges, being able to generate their own leads, having the freedom to make decisions and adapt established selling methods, sincere/career-relevant recognition, feedback, perks, change, a loosely structured work environment, administrative support to handle servicing/paperwork, being able to measure individual performance against that of other people in the same job, and working in a job where results are more important than processes.

### DEMOTIVATORS

Feeling that exceptional sales results will not result in recognition, increased compensation, or advancement. Not having a way to prove themselves, measure individual performance, or compete against other people doing the same job. Having to handle very routine, repetitive tasks that require meticulous attention to details and a solitary effort. Being expected to rigidly follow a sales formula; working for a very controlling sales manager. If a salesperson has similarly tall columns 8 and 7, then not having any management feedback could also be de-motivating.

### ACTION PLAN

Provide regular chances to win/advance, set specific sales goals and offer some guidance initially. Once the basics have been learned, manage them informally. Hold the salespeople accountable for meeting their goals and provide public praise and financial incentives for achievement. Monitor organizational skills, follow through with leads that take multiple calls to secure, and provide administrative support.





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## SUPPLEMENTAL QUESTIONS

The following behaviorally-based questions are a supplemental tool we provide to help you better evaluate the participant. 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. Are you a self-starter? Provide examples of times you have taken significant initiative on your own to develop new business.

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2. Describe a selling situation where it was critical to ask questions and obtain good information. What happened?

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3. How many prospects can you see in a week, and how much time do you like to schedule between calls/appointments? What happens if you have less time?

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4. What are some of the things that bother you?

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5. What is the longest it has taken you to become productive in a new job? Could you have done anything to speed up the process?

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6. When was the last time you had to adapt an existing guideline or procedure because you felt it did not apply to your situation? What was the outcome?

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