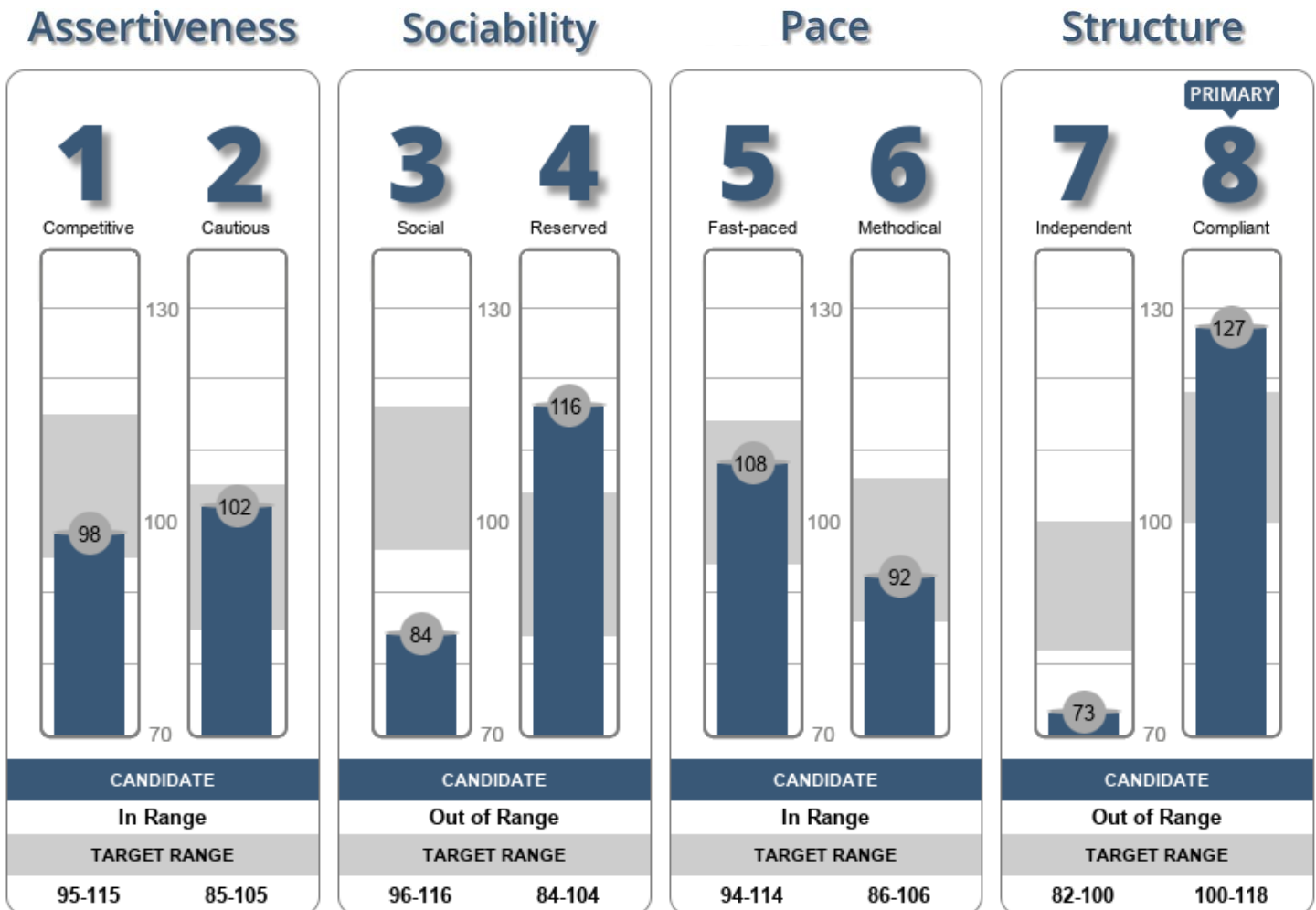


Client Name: Omnia Report Samples
 Client Number: 20-SAMPLES
 Candidate Name: Sam Sample
 Job Target: Selling CSR (relational)
 Target Number: 220239
 Profile Number: 1675892WB
 Report Date: July 11, 2023
 Dept./Div.: Customer Service
 Compatibility Rating: Good

Rating Summary:

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

A good rating suggests the candidate's strengths align with your target, but minor management concerns may exist.



Client Name: Omnia Report Samples

Client Number 20-SAMPLES

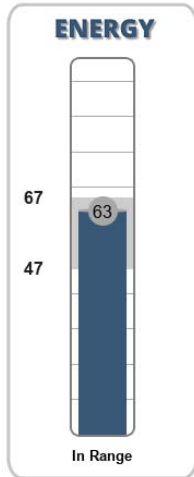
Candidate Name: Sam Sample

Job Target: Selling CSR (relational)

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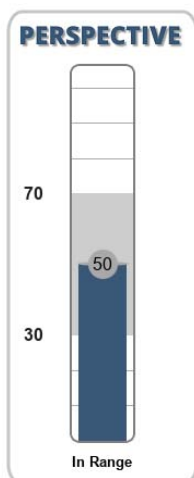
Target Number: 220239

COMPARISON TO TARGET



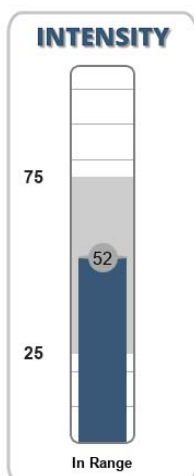
The candidate selected an average number of words on the assessment.

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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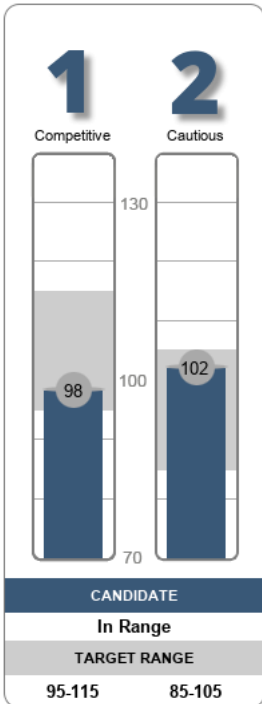
Candidate Name: Sam Sample

Job Target: Selling CSR (relational)

Profile Number: 1675892WB

Target Number: 220239

COMPARISON TO TARGET

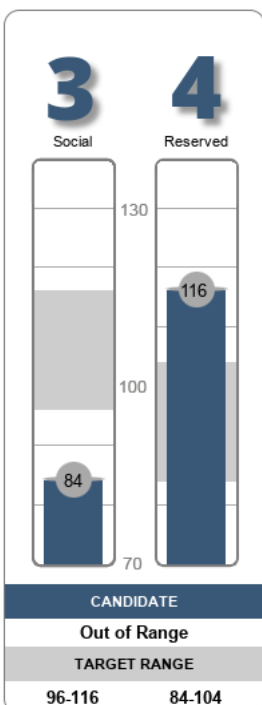


This candidate falls within the target range for assertiveness. **Target Range:** Column 1 is taller than, equal to, or moderately shorter than column 2.

Column 1 represents assertiveness, self-confidence, and self-starting behavior. Candidates with a tall column 1 should take strong initiative to promote and suggestively sell products and services as they provide proactive service to customers. They are naturally assertive when making recommendations to customers or resolving issues.

Column 2 indicates caution, helpfulness, and a strong team orientation. A CSR with a tall column 2 is supportive of co-workers and customers and focused on providing quality service and gaining customer satisfaction. The approach to selling is apt to be low-key and nonintrusive, so it is important to show them how suggestive selling can be used as a service enhancement rather than a push.

Equal columns 1 and 2 indicate a good mix of proactive and supportive behavior. This candidate can comfortably suggest additional products and services but is not pushy. There is a focus on customer satisfaction as well as sales goals.



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

Strengths: Evaluating customer needs objectively and matching them with the best products and services. Providing specific, practical information when responding to customers' questions. Gathering data on customers' needs, staying knowledgeable about options. Focusing on solitary tasks such as research and paperwork.

Challenges: May be too serious or even blunt when speaking to customers. Could have difficulty showing empathy or quickly establishing rapport with customers. Might sometimes prefer to work on solitary tasks instead of frequently interacting with people. May not be proactive about calling customers to maintain relationships.

Action Plan: Encourage this person to make some initial small talk to help set customers at ease. Role-play various sales situations to build confidence with making conversation with customers. Suggest ways to verbally express empathy for customers' situations and problems. This candidate might like to spend a regular portion of each day on more solitary tasks. Intellectual challenge is a potential motivator; provide opportunities to learn and develop expertise in new areas. Privately offer job-specific feedback, and set measurable performance goals.

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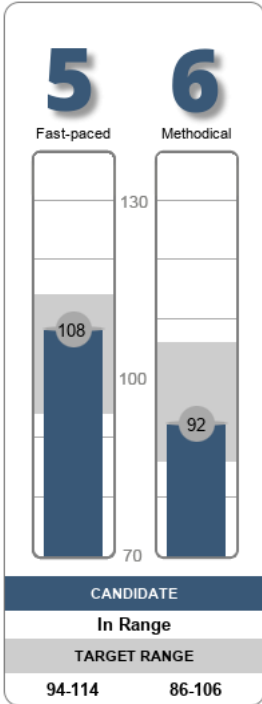
Candidate Name: Sam Sample

Job Target: Selling CSR (relational)

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COMPARISON TO TARGET

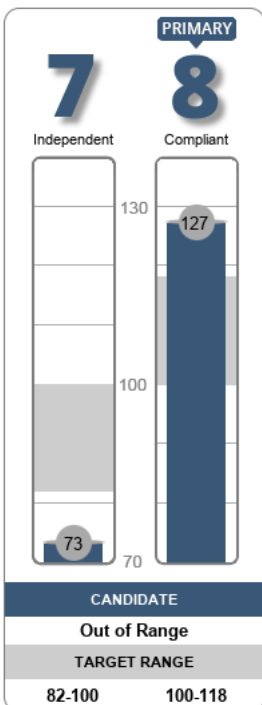


This candidate falls within the target range for pace. **Target Range:** Column 5 is taller than, equal to, or moderately shorter than column 6.

Column 5 implies flexibility and an ability to quickly adapt to new situations, deal with changing priorities, and tolerate frequent interruptions. There is a willingness to juggle different customers' needs at once and a good sense of urgency for getting timely sales results.

Column 6 indicates patience, persistence, and a preference for following a set routine and completing one task at a time. There is a high tolerance for repetition and a willingness to take as much time as needed when assisting customers.

Equal columns 5 and 6 indicate a good balance of flexibility and urgency. This candidate works at a steady, even pace and is just as comfortable adapting to changes or following a routine.



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

Strengths: Paying attention to details, double-checking data entry and documentation, verifying the accuracy of customer records, following established procedures and regulations closely. Making sure customers' needs are completely met. Placing a strong emphasis on quality and compliance.

Challenges: Acting independently or decisively in unfamiliar situations, accepting criticism, recovering from sales rejections, letting go of details. Might get quickly demoralized after unsuccessful sales calls and could feel reluctant to make the next one. Could seek frequent guidance or approval. May be perfectionistic, which could diminish productivity at times.

Action Plan: Give this individual regular feedback, keeping it tactful and appreciative, and ensure resources are available to help with decision making. Be available to answer questions and clarify instructions. Provide detailed guidelines, and outline the steps to take when suggesting products and services to customers. Reassure this candidate after disappointing rejections; remind them not to take it personally. Ensure this candidate realizes when it is acceptable to let go of a task and move on to the next.

Client Name: Omnia Report Samples

Client Number 20-SAMPLES

Candidate Name: Sam Sample

Job Target: Selling CSR (relational)

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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.

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Job Target: Selling CSR (relational)

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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

If your candidate has a tall:

Column 1: Assertive, proactive communicator.

Column 2: Cautious, low-key communicator.

Column 3: Dynamic, upbeat, and enthusiastic. Comfortable breaking the ice with people and establishing rapport in order to grow existing customers, create new customers, and meet or exceed sales quotas. Interpersonal aptitude is strong and presentation style is engaging.

Column 4: Straightforward, business-focused communicator. Keeps conversations focused on assessing customer needs and educating customers about terminology, features, and benefits to improve product-related sales and customer satisfaction. This person listens more than talks and is likely to provide specific data and facts when talking to customers. Candidate is an informative versus persuasive seller.

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 thorough, uses details.

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DEVELOPMENT INSIGHT

STRENGTHS

If your candidate has a tall:

Column 1: Offering additional products and services in a proactive manner, creating need, convincing customers to buy.

Column 2: Providing a service for customers, working as part of a team, and responding to versus creating needs.

Column 3: Cultivating relationships with customers, communicating with enthusiasm, smoothing over customers' concerns. Persuasive sales approach.

Column 4: Evaluating each customer's specific needs, gathering data, researching and troubleshooting customer problems. Informative sales approach.

Column 5: Adapting to interruptions and shifting priorities, working at a quick pace.

Column 6: Dealing with repetitive tasks or phone calls, patiently handling customers' concerns.

Column 7: Dealing with ambiguity, making decision in unfamiliar situations, and resilience.

Column 8: Strong attention to detail, concern for quality and compliance. Accurately gathering and maintaining information, staying organized, keeping track of follow-up. Abiding by company guidelines and industry regulations.

CHALLENGES

If your candidate has a tall:

Column 1: Could have an overly bold and forceful sales style, may not collaborate with co-workers.

Column 2: Non-assertive personality, could struggle to make sales suggestions to customers even when they are happy with the service.

Column 3: Might not always listen attentively or communicate with specifics when handling service problems.

Column 4: Might not build rapport quickly, could be too reserved. Likely to be overly analytical and logical in sales approach.

Column 5: Could be impatient and disorganized.

Column 6: Could struggle to work in a highly time-sensitive, multitasking environment.

Column 7: Low attention to detail for accurately completing intricate tasks.

Column 8: High sensitivity to rejection, could struggle to bounce back confidently from rejection.

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Candidate Name: Sam Sample

Job Target: Selling CSR (relational)

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DEVELOPMENT INSIGHT

PACE

If your candidate has a:

Tall column 5: Fast-paced expediter who comfortably multitasks. Energized by variety and a busy environment. Expect an ability to meet tight deadlines, deal efficiently with change, and prioritize activities without assistance.

Tall column 6: Methodical and orderly. Works patiently toward long-range goals and is most efficient when allowed to establish and follow a fairly predictable routine. This individual is comfortable with lengthy or repetitive tasks that others may find tedious.

Balance of columns 5 and 6: Evenly paced. Some urgency and flexibility for efficiently handling assignments yet also sufficient patience for being thorough.

ATTENTION TO DETAIL

If your candidate has a:

Tall column 7: Limited attention to detail. Not naturally meticulous and will generally be more focused on the big picture (closing sales and getting results) than on the details and processes involved in servicing accounts, like entering information into a database and documenting calls.

Tall column 8: Strong attention to details and processes; produces accurate administrative results and does what is necessary to avoid errors. This person favors working within specific parameters and closely following guidelines to avoid making mistakes.

Balance of columns 7 and 8: Moderate attention to detail. Focuses on both the important particulars and the overview. Quality conscious but not perfectionistic; self-sufficient within a procedural framework.

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DEVELOPMENT INSIGHT

MOTIVATIONAL STRATEGIES

If your candidate has a tall:

Column 1: Opportunities to grow in the position, take on challenges, and gain individual rewards (like sales incentives and commission).

Column 2: Being able to contribute toward the efforts of a team and help customers. Job security and co-workers' acceptance.

Column 3: Interacting with people, receiving praise and awards in front of the team.

Column 4: The chance to solve customer problems and concerns and to be an expert resource in a particular area.

Column 5: Short-term goals, changes of pace, task variety. Feeling an ongoing sense of accomplishment.

Column 6: Advance notice of pending deadlines and time to prepare for changes.

Column 7: Having self-managing latitude, freedom to make decisions within parameters of the role.

Column 8: Having specific procedures to follow and a sales script, knowing exactly what is expected, receiving regular feedback.

DEMOTIVATORS

If your candidate has a tall:

Column 1: No chances to advance or assume new responsibilities.

Column 2: Having to be pushy, having a large proportion of variable pay.

Column 3: Not being noticed, not receiving any recognition, being isolated from people.

Column 4: No opportunities to increase knowledge about your industry and organization, its processes, and the various products and services it offers.

Column 5: Following a predictable routine, not having any diversity in responsibilities and duties.

Column 6: Dealing with constant interruptions and tight deadlines, not being allowed to work within a regular routine.

Column 7: Being too closely managed. Being responsible for highly detailed assignments and duties.

Column 8: Working on unfamiliar tasks or projects without receiving clear input regarding how they should be done. Feeling management is unavailable to answer questions or provide feedback.

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DEVELOPMENT INSIGHT

ACTION PLAN

If your candidate has a tall:

Column 1: Provide opportunities to grow, advance, and/or compete. Likely to appreciate sales contests as well as an incentive pay structure. Coach on providing excellent service.

Column 2: Be available to offer support in new or difficult situations. Coach on initiating sales conversations and employing strategies to close sales.

Column 3: Manage with praise and public recognition. Coach on listening skills and concentrating on solo assignments.

Column 4: Offer specific feedback and mentally engaging tasks. Coach on breaking the ice and building rapport with customers.

Column 5: Set short-term goals, and provide task variety where you can. Coach on time management and avoiding overextension.

Column 6: Keep work processes orderly and systematic. Give ample notice of changes and deadlines. Coach on prioritizing work when several tasks compete for attention simultaneously.

Column 7: Likes autonomy so avoid overmanaging this person. Set goals together rather than dictating terms. Coach on attention to detail and communicating with specifics.

Column 8: Likes structure so be specific and diplomatic when providing feedback. Provide a script for suggestive selling. Coach on bouncing back from 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. Are you a person who likes to try new things or are you more comfortable with regular routines?

2. Describe how you have reassured (or would reassure) very concerned or upset customers.

3. How do you seek feedback and support from colleagues or supervisors when you encounter work-related frustrations or challenges?

4. How would you plan your workday to maximize your productivity?

5. Talk about a time you had to think very creatively to handle a unique problem.

6. When is it necessary to be assertive with customers, and how are you able to be assertive while still maintaining good rapport?
