



## Sales: Coaching Report

One person, one position

RESULTS SUMMARY

DEFINITIONS

PERSONALIZED FEEDBACK



PROVIDED BY

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# INTRODUCTION

This report is intended to give you a deeper understanding of **Oliver Chase's** Thinking Style, Behavioral Traits, and Interests in relation to the position of **\*\* Sample Sales Position for PXT Select \*\***. Along with some insight into his motivations and challenge areas, it will provide you with useful tips to aid in his training and development.

## What's in this report?

<p><b>RESULTS SUMMARY</b></p> <p>Assessment results are compared to the Performance Model, which shows the range of scores typical for success in the position</p>	<p><b>DEFINITIONS</b></p> <p>Thinking Style and Behavioral Traits will be defined on the pages following the results summary</p>	<p><b>PERSONALIZED FEEDBACK</b></p> <p>You will receive feedback personalized for the individual based on the results and how they should be interpreted</p>
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## What does the assessment measure?

### THINKING STYLE

- Thinking Style is the ability to process information.
- It includes problem-solving, communication, interaction, and learning skills.
- Results are illustrated on scales ranging from 1 to 10.
- A higher score is not necessarily the best indicator of on-the-job performance.

### BEHAVIORAL TRAITS

- Behavioral Traits are commonly observed actions that help define who someone is.
- Each scale is defined by two opposing, but equally valuable, end points.
- One side of the continuum is not better than the other.

### INTERESTS

- The Interests section may predict motivation and potential satisfaction with various jobs.
- These are ranked in order from the highest- to lowest-scoring interest.

## Distortion was not detected in this report. What does that mean?

Some candidates may answer in a way that is socially desirable or to make themselves look better, rather than respond candidly and risk disapproval. Based on his assessment results, it appears that **Oliver answered candidly**.

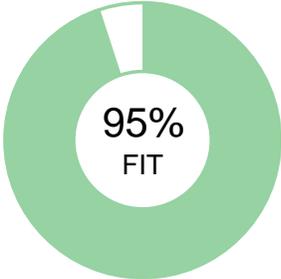
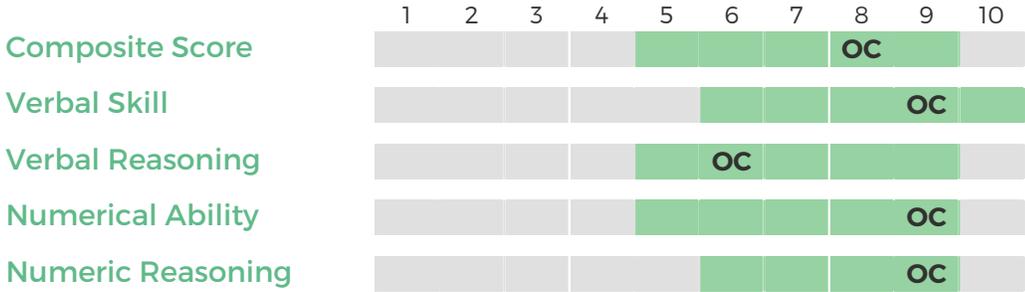
# \*\* SAMPLE SALES POSITION FOR PXT SELECT \*\*

Oliver Chase

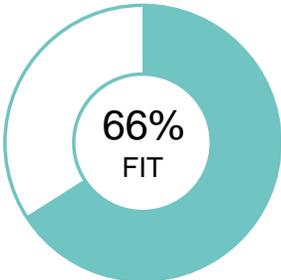
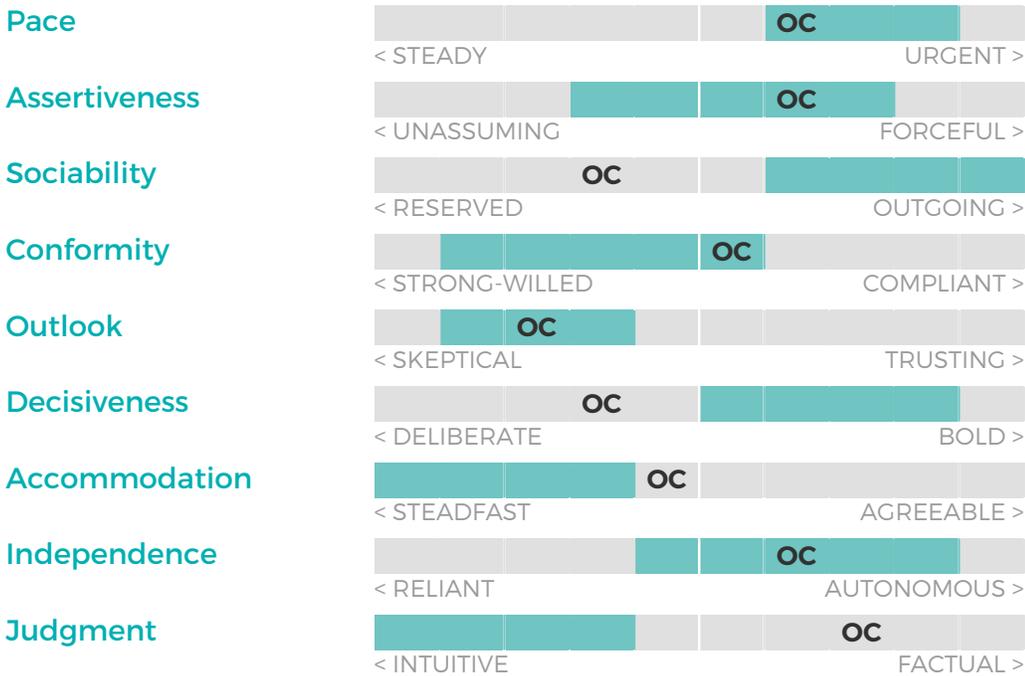


Performance Model = highlighted boxes; Oliver's placement = his initials

## THINKING STYLE



## BEHAVIORAL TRAITS



## INTERESTS

### OLIVER

in rank order

TECHNICAL

CREATIVE

FINANCIAL/ADMIN

ENTERPRISING

PEOPLE SERVICE

MECHANICAL

TIED

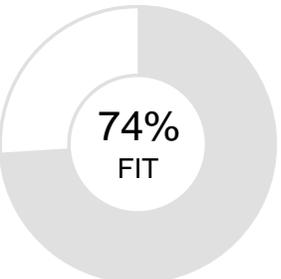
### PERFORMANCE MODEL

in rank order

ENTERPRISING

PEOPLE SERVICE

CREATIVE



# COMPOSITE SCORE

## Thinking Style

**Composite Score** A reflection of overall learning, reasoning, and problem-solving potential

The Composite Score is the combined score of the four other Thinking Style scales. Because looking at a person's Thinking Style comprehensively is most effective in a coaching context, it is the only Thinking Style scale discussed in this report.



- Oliver fits the Performance Model for the Composite Score.
- He tends to learn quickly and understand complex information without difficulty.

### What you need to know about Oliver:

- He is an effective learner who may appreciate a challenge while training on a new sales product.
- He solves problems effectively, considering solutions from many different perspectives.
- Without challenge in a training program, you may lose his full attention.
- His capacity to adapt to various training situations and to various approaches to the sales process is very strong.
- Oliver learns easily and can apply that learning to the requirements of working with a new client or job situation.

### Management tips:

- Keep his workload and training opportunities challenging enough so that he doesn't get bored and lose interest.
- Invite Oliver to apply his problem-solving skills to challenging sales prospects and to challenges within the department.
- If others need more time to learn a shared task or a new product, provide Oliver with additional, meaningful work to keep him engaged.

#### BOTTOM LINE:

**Oliver is highly responsive to sales training programs, changes to processes, and new products at many levels of complexity.**

# PACE

## Behavioral Traits

**Pace** Overall rate of task completion

< STEADY

URGENT >

OC

- Oliver fits the Performance Model for Pace.
- He tends to be fairly driven and works at a moderate to fast pace.

### What you need to know about Oliver:

- He typically acts with a sense of urgency under routine sales conditions.
- He generally prefers to work at a slightly hurried pace.
- Usually, Oliver starts sales assignments in a timely manner.
- Most likely, he prefers to avoid sedentary or repetitive work.
- He may seek to implement new ideas with urgency.

### Management tips:

- Work together to set sales deadlines and quotas that you're both comfortable with.
- Ask him to slow down when you think more concentration would be beneficial.
- To help keep him engaged, give him opportunities to take on new responsibilities.

#### **BOTTOM LINE:**

Oliver responds well to time constraints and generally works at a brisk pace.

# ASSERTIVENESS

## Behavioral Traits

**Assertiveness** Expression of opinions and need for control

< UNASSUMING

FORCEFUL >

OC

- Oliver fits the Performance Model for Assertiveness.
- He tends to be fairly comfortable sticking up for his opinions and needs.

### What you need to know about Oliver:

- He tends to be motivated by situations in which he is held accountable for results.
- He is willing to be assertive, to be more of a leader than a follower.
- Oliver typically uses direct statements in sales negotiations.
- He will likely present his sales pitch with a fair amount of confidence.
- At times, he may be overly assertive when negotiating sales.

### Management tips:

- Provide positive feedback when he engages in active listening rather than just pushing his agenda.
- If you notice that he tends to dominate in sales situations, provide feedback suggesting that he allow clients more opportunity to express their doubts.
- Give him opportunities to lead discussions if he appears to have a desire to do so.

#### BOTTOM LINE:

He takes on leadership roles comfortably but is still willing to listen to others' perspectives carefully when the situation calls for it.

# SOCIABILITY

## Behavioral Traits

**Sociability** Desire for interaction with others

< RESERVED

OC

OUTGOING >

- Oliver does not fit the Performance Model for Sociability.
- He tends to be fairly introverted and may often keep to himself.

### What you need to know about Oliver:

- He may be somewhat uncomfortable as the center of attention.
- He expresses moderate enjoyment of salesmanship involving contact with clients.
- Oliver tends to prefer working with a detached, task-oriented style of sales service.
- He may prefer to accomplish sales in a more formal, "strictly business" fashion.
- He can likely work well without relying on strong personal relationships.

### Management tips:

- Ask him how he prefers to be approached when you need him (email, phone, one-on-one, etc.).
- Encourage him to socialize with his fellow salespeople, prospects, and clients, but also recognize that this may be somewhat draining for him.
- Maintain a casual demeanor with him, encouraging a more open and relaxed way of communicating with others.

#### **BOTTOM LINE:**

**Oliver tends to prefer an impersonal sales style.**

# CONFORMITY

## Behavioral Traits

**Conformity** Attitude on policies and supervision

< STRONG-WILLED

COMPLIANT >

OC

- Oliver fits the Performance Model for Conformity.
- He tends to be cooperative and usually works within the rules.

### What you need to know about Oliver:

- He is typically willing to accept guidance and suggestions from those in authority
- He is friendly, cooperative, and likely fairly easy to manage.
- Oliver demonstrates a positive attitude concerning organizational constraints and restrictions.
- He should be willing to conform to sales policies without feeling any loss of personal freedom.
- He will usually accept the advice and criticism of sales managers.

### Management tips:

- Encourage free thinking and reward efforts to develop creative solutions to accomplishing sales tasks, even if they contradict established procedures.
- Acknowledge the importance of procedural requirements, but encourage personal expression in areas that don't need as much regulation.
- Demonstrate in your daily work how it is acceptable to bend the rules within the limits of your organizational culture.

#### **BOTTOM LINE:**

**He responds well to a regulated sales environment and is willing to accept external controls.**

# OUTLOOK

## Behavioral Traits

**Outlook** Anticipation of outcomes and motives

< SKEPTICAL

TRUSTING >

OC

- Oliver fits the Performance Model for Outlook.
- He tends to be skeptical and looks for the evidence to back up a claim.

### What you need to know about Oliver:

- He typically has a guarded outlook on how well things are likely to turn out.
- Oliver may express doubts about the outcome of sales, appearing pessimistic.
- He may be skeptical of people's motives in sales negotiations, especially when emotional appeals are involved.
- He may question changes in policies or the sales process and usually prefers to know why they were enacted.
- He will almost always focus on the risks and potential consequences of sales opportunities, considering potential clients' motives carefully.

### Management tips:

- Use his tendency to second-guess as an asset to determine the merit of new ideas.
- Encourage him to get to know his clients so he may be less questioning of their motivation.
- Encourage him to ask for evidence when problem solving, but don't allow him to dig in his heels and argue the potential risks just for the sake of argument.

#### **BOTTOM LINE:**

Oliver functions best when he is encouraged to use vigilance and caution to regularly question sales situations.

# DECISIVENESS

## Behavioral Traits

**Decisiveness** Use of speed and caution to make decisions

< DELIBERATE

OC

BOLD >

- Oliver does not fit the Performance Model for Decisiveness.
- He prefers to take some time to think carefully before making a decision.

### What you need to know about Oliver:

- Oliver is capable of making timely decisions during sales negotiations, but may hesitate when under stress.
- He usually takes time to collect supporting information and data before drawing conclusions.
- Most likely, he will carefully weigh the risks of a situation before making a decision.
- If he feels disorganized or ill-prepared, Oliver may delay making important decisions during the sales process.
- He likely prefers to have a reasonable amount of time to consider significant decisions.

### Management tips:

- Encourage him to find a constructive way to evaluate ideas, such as listing pros and cons.
- Set a clear deadline for when you require an answer.
- Give him opportunities to make smaller or less critical decisions in a more timely fashion.

#### **BOTTOM LINE:**

**He prefers to make careful, informed decisions, but can be convinced to move quickly when urgency is required.**

# ACCOMMODATION

## Behavioral Traits

**Accommodation** Inclination to tend to others' needs and ideas

< STEADFAST

AGREEABLE >

OC

- Oliver does not fit the Performance Model for Accommodating.
- He is willing, in most circumstances, to express disagreement and defend his opinions.

### What you need to know about Oliver:

- Most of the time, he will take a stand for what he feels is right.
- While he will usually listen to others' perspectives, he will likely stand by his position if there is a disagreement.
- He probably won't let anyone take advantage of him during sales negotiations.
- He can be agreeable and cooperative with clients, but does not go along just to get along.
- Oliver might be less likely than others to avoid arguments, disagreements, and/or conflict during the sales process.

### Management tips:

- When necessary, remind him to seek out common ground with clients as needed.
- Reward any attempts he makes to seek out the agreement of the team.
- Recognize the value of expressing a differing opinion, but be mindful that this doesn't create a hurtful or negative environment.

#### **BOTTOM LINE:**

**He responds appropriately to the needs of his clients but rarely suppresses his opinions.**

# INDEPENDENCE

## Behavioral Traits

**Independence** Level of preference for instruction and guidance

< RELIANT

AUTONOMOUS >

OC

- Oliver fits the Performance Model for Independence.
- He often likes to set his own direction.

### What you need to know about Oliver:

- He generally prefers little instruction when carrying out sales negotiations.
- On occasion, he may want some guidance and instruction to complete the sales transaction.
- Oliver is usually self-sufficient and willing to take on new sales developments or clients on his own.
- He prefers to decide his own course of action in most sales situations.
- He is comfortable solving problems and handling situations independently when necessary.

### Management tips:

- Give him a reasonable amount of control over his work.
- If he is working independently, check in from time to time to make sure he is on track.
- When you need to limit his freedom, make sure you explain why it's necessary.

#### **BOTTOM LINE:**

**Oliver is moderately independent but still accepts necessary guidance and instruction.**

# JUDGMENT

## Behavioral Traits

**Judgment** Basis for forming opinions and making decisions

< INTUITIVE

FACTUAL >

OC

- Oliver does not fit the Performance Model for Judgment.
- He tends to base decisions wholly on the facts of the matter.

### What you need to know about Oliver:

- He probably needs to see all the facts before determining a solution for a client.
- He exceedingly relies on objective data when determining appropriate sales solutions.
- Oliver may frequently discount the value of personal feelings and circumstances when making decisions.
- He attends to potential problems by examining factual information.
- Oliver has a tendency to take a very objective view to reach conclusions during sales negotiations.

### Management tips:

- If he is required to make a sales decision without the benefit of hard data, encourage him to express concerns or caveats associated with his decision.
- Show him the value of gathering subjective opinions, including his own, to make well-rounded decisions during selling situations.
- When there is too much information to sift through or all options seem to be favorable, encourage him to make decisions based on his overall impressions.

#### **BOTTOM LINE:**

**He heavily focuses on the factual information available to make judgment calls and decisions.**

# INTERESTS

## OLIVER'S ORDER OF INTERESTS

Ordered from his highest- to lowest-scoring interest

Interests from the \*\* Sample Sales Position for PXT Select \*\* Performance Model are bolded

Ties are indicated if present

TECHNICAL

**CREATIVE**

FINANCIAL/ADMIN

**ENTERPRISING**

**PEOPLE SERVICE**

MECHANICAL

] TIED

## What is Oliver most interested in?

**Technical:** Technical aspects of the sales process appear to interest Oliver. Most likely, he is interested in sales presentations that involve research, theories, and the application of technical information. He may be particularly interested in analytical or conceptual tasks that require critical thinking.

**Creative:** Creativity is one of Oliver's top interests. This means that he is probably motivated by innovative or imaginative sales pursuits. Whether it involves designing new things, coming up with ideas, or figuring out a way to do something better, this aspect of the sales process can help enhance his job satisfaction.

**Financial/Admin:** Oliver appears to be interested in the Financial or Administrative side of selling situations. Therefore, he is likely to organize sales-related information in order to make the selling process more efficient. A main source of motivation for him may be in classifying and managing information.

**Enterprising:** Seeking out Enterprising pursuits or leadership may be one of Oliver's primary interests. It's likely that he will use persuasiveness to close the deal. Also, he will probably be attracted to activities that let him network or find new prospects.

### BOTTOM LINE:

Oliver will likely enjoy the Creative and Enterprising aspects of the job. However, he may not find People Service activities as motivating as other salespeople who have been successful in this position.