

# SUCCESS INSIGHTS®

Sales Version

*"He who knows others is learned.  
He who knows himself is wise."  
-Lao Tse*

**SAMPLE**

4-1-2009



# INTRODUCTION

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Behavioral research suggests that the most effective people are those who understand themselves, both their strengths and weaknesses, so they can develop strategies to meet the demands of their environment.

This report analyzes behavioral style, that is, a person's manner of doing things. Is the report 100% true? Yes, no and maybe. We are only measuring behavior. We only report statements which are true and areas of behavior in which tendencies are shown. Feel free to delete any statement from the report that may not apply, but only after checking with friends or colleagues to see if they agree.



## SALES CHARACTERISTICS

*Based on SAMPLE's responses, the report has selected general statements to provide a broad understanding of her sales style. This section highlights how she deals with preparation, presentation, handling objections, closing, and servicing. The statements identify the natural sales style she brings to the job. Eliminate or modify any statement that is not true based on sales training or experience.*

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SAMPLE prefers to sell in a territory where she knows the customers. This allows her to predict the sales environment and she can perform well under these circumstances. Most potential buyers feel comfortable with her. She is usually well prepared for the call and will present her information in a logical order. She is nondemonstrative and wants her customers or clients to know that she is their "anchor of reality" in a "sea of confusion." Sometimes she prefers to sell tangible products over intangibles. Although she can probably sell either, she is more comfortable with products people can see and touch. SAMPLE tends to build close relationships with her clients or customers. She likes to build close relationships with her customers and prefers making repeat calls, as opposed to cold calls. She resists making cold calls preferring to work in the more predictable environment of repeat calls. She may have difficulty selling the aggressive buyer who just wants to hear the "bottom line" benefits. Her natural sales style is slower paced than what the aggressive buyer wants.

SAMPLE likes to use sales aids to augment her presentation. In fact, she often takes too much material. She also tries to cover all the benefits for the buyer. She usually answers objections with facts and data. If she lacks this information, don't expect her to make up an answer. She may display frustration when confronted with objections she doesn't have the proper data to answer. She represents the type of salesperson who prepares before she makes a sales presentation. She wants



## SALES CHARACTERISTICS

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complete knowledge of her product or service. If she is armed with knowledge and preparation, she will deliver a logical presentation. Occasionally, she spends too much time in the office. She uses this office time to meet her need for adequate preparation, since she becomes frustrated when prospects ask questions she can't answer.

Objections raised by intimidating buyers will frustrate her. They are looking for direct answers to their objections, and she may feel threatened by their approach. Flexibility can be a problem with her. She prefers selling her way and may resist changing her presentation to meet the buyer's buying habits.

SAMPLE may side with the customer, if the customer is dissatisfied with the product or service. Her basic approach to servicing is to make the customer happy. She can become complacent with servicing the old accounts and not push hard enough for new business. She will take the time to see that all her accounts are serviced to the best of her ability. She tends to use the soft-sell approach to closing. She won't close hard, but will continue to call on the account until she gets the sale. Persistence may be her best closing method. Occasionally she might need more time for closing because she spent too much time on the presentation. She loves to service what she sells. In fact, this represents one of her strengths.



## VALUE TO THE ORGANIZATION

*This section of the report identifies the specific talents and behavior SAMPLE brings to the job. By looking at these statements, one can identify her role in the organization. The organization can then develop a system to capitalize on her particular value and make her an integral part of the team.*

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- Will follow instructions.
- Good at reconciling factions--is calm and adds stability.
- Cooperative member of the team.
- Turns confrontation into positives.
- Works for a leader and a cause.
- People-oriented.
- Respect for authority and organizational structure.



## CHECKLIST FOR COMMUNICATING

*Most people are aware of and sensitive to the ways with which they prefer to be communicated. Many people find this section to be extremely accurate and important for enhanced interpersonal communication. This page provides other people with a list of things to DO when communicating with SAMPLE. Read each statement and identify the 3 or 4 statements which are most important to her. We recommend highlighting the most important "DO's" and provide a listing to those who communicate with SAMPLE most frequently.*

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Do:

- Look for hurt feelings, personal reasons, if you disagree.
- Keep conversation at discussion level.
- Provide solid, tangible, practical evidence.
- Give her time to ask questions.
- Provide guarantees that her decision will minimize risks; give assurance that provides her with benefits.
- Be sincere and use a tone of voice that shows sincerity.
- Present your case softly, nonthreateningly with a sincere tone of voice.
- Watch carefully for possible areas of early disagreement or dissatisfaction.
- Be prepared.
- Take your time and be persistent.
- Give her time to verify reliability of your comments--be accurate and realistic.
- Support your communications with correct facts and data.



## INEFFECTIVE COMMUNICATION

*This section of the report is a list of things NOT to do while communicating with SAMPLE. Review each statement with SAMPLE and identify those methods of communication that result in frustration or reduced performance. By sharing this information, both parties can negotiate a communication system that is mutually agreeable.*

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### Don't:

- Rush her in the decision-making process.
- Be domineering or demanding; don't threaten with position power.
- Patronize or demean her by using subtlety or incentive.
- Use testimonies from unreliable sources.
- Talk to her when you're extremely angry.
- Be abrupt and rapid.
- Don't be haphazard.
- Manipulate or bully her into agreeing because she probably won't fight back.
- Talk in a loud voice or use confrontation.
- Give your presentation in random order.
- Force her to respond quickly to your objectives; don't say "Here's how I see it."



## SELLING TIPS

*This section provides suggestions on methods which will improve SAMPLE's communications when selling to different styles. The tips include a brief description of typical people in which she may interact. By adapting to the communication style desired by other people, SAMPLE will become more effective in her communications with them. She may have to practice some flexibility in varying her communication style with others who may be different from herself. This flexibility and the ability to interpret the needs of others is the mark of a superior salesperson.*

<p>When selling to a person who is dependent, neat, conservative, perfectionist, careful and compliant:</p> <ul style="list-style-type: none"> <li>■ Prepare your "presentation" in advance.</li> <li>■ Stick to business--provide fact to support your presentation.</li> <li>■ Be accurate and realistic--don't exaggerate.</li> </ul> <p>Factors that will create tension:</p> <ul style="list-style-type: none"> <li>■ Being giddy, casual, informal, loud.</li> <li>■ Wasting time with small talk.</li> <li>■ Being disorganized or messy.</li> </ul>	<p>When selling to a person who is ambitious, forceful, decisive, strong-willed, independent and goal-oriented:</p> <ul style="list-style-type: none"> <li>■ Be clear, specific, brief and to the point.</li> <li>■ Stick to business. Give an effective presentation.</li> <li>■ Come prepared with support material in a well-organized "package."</li> </ul> <p>Factors that will create tension:</p> <ul style="list-style-type: none"> <li>■ Talking about things that are not relevant to the issue.</li> <li>■ Leaving loopholes or cloudy issues.</li> <li>■ Appearing disorganized.</li> </ul>
<p>When selling to a person who is patient, predictable, reliable, steady, relaxed and modest:</p> <ul style="list-style-type: none"> <li>■ Begin with a personal comment--break the ice.</li> <li>■ Present yourself softly, nonthreateningly and logically.</li> <li>■ Earn their trust--provide proven products.</li> </ul> <p>Factors that will create tension:</p> <ul style="list-style-type: none"> <li>■ Rushing headlong into the interview.</li> <li>■ Being domineering or demanding.</li> <li>■ Forcing them to respond quickly to your questions.</li> </ul>	<p>When selling to a person who is magnetic, enthusiastic, friendly, demonstrative and political:</p> <ul style="list-style-type: none"> <li>■ Provide a warm and friendly environment.</li> <li>■ Don't deal with a lot of details, unless they want them.</li> <li>■ Provide testimonials from people they see as important.</li> </ul> <p>Factors that will create tension:</p> <ul style="list-style-type: none"> <li>■ Being curt, cold or tight-lipped.</li> <li>■ Controlling the conversation.</li> <li>■ Driving on facts and figures, alternatives, abstractions.</li> </ul>





## IDEAL ENVIRONMENT

*This section identifies the ideal work environment based on SAMPLE's basic style. People with limited flexibility will find themselves uncomfortable working in any job not described in this section. People with flexibility use intelligence to modify their behavior and can be comfortable in many environments. Use this section to identify specific duties and responsibilities that SAMPLE enjoys and also those that create frustration.*

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- Needs personal attention from her sales manager and compliments for each assignment well done.
- Assignments that can be completed one at a time. A
- stable and predictable environment.
- An environment that allows time to change.
- Needs an opportunity to deal with customers with whom a long-standing relationship has been established.
- An environment in which she may deal with people on a personal, intimate basis.
- Sales territory for which standards and goals are established.



# PERCEPTIONS

*A person's behavior and feelings may be quickly telegraphed to others. This section provides additional information on SAMPLE's self-perception and how, under certain conditions, others may perceive her behavior. Understanding this section will empower SAMPLE to project the image that will allow her to control the situation.*

## "See Yourself As Others See You"

### SELF-PERCEPTION

SAMPLE usually sees herself as being:

Considerate  
Good-Natured  
Team player

Thoughtful  
Dependable  
Good listener

### OTHERS' PERCEPTION

Under moderate pressure, tension, stress or fatigue, others may see her as being:

Nondemonstrative  
Unconcerned

Hesitant  
Inflexible

And, under extreme pressure, stress or fatigue, others may see her as being:

Possessive  
Detached

Stubborn  
Insensitive



# DESCRIPTORS

Based on SAMPLE's responses, the report has marked those words that describe her personal behavior. They describe how she solves problems and meets challenges, influences people, responds to the pace of the environment and how she responds to rules and procedures set by others.

Dominance	Influencing	Steadiness	Compliance
Demanding	Effusive	Phlegmatic	Evasive
Egocentric	Inspiring	<b>Relaxed</b>	Worrisome
Driving	<b>Magnetic</b>	<b>Resistant to Change</b>	Careful
Ambitious	<b>Political</b>	<b>Nondemonstrative</b>	Dependent
Pioneering	<b>Enthusiastic</b>	<b>Passive</b>	Cautious
Strong-Willed	<b>Demonstrative</b>	<b>Patient</b>	Conventional
Forceful	<b>Persuasive</b>	<b>Possessive</b>	Exacting
Determined	<b>Warm</b>	<b>Predictable</b>	Neat
Aggressive	<b>Convincing</b>	<b>Consistent</b>	Systematic
Competitive	<b>Polished</b>	<b>Deliberate</b>	Diplomatic
Decisive	<b>Poised</b>	<b>Steady</b>	Accurate
Venturesome	<b>Optimistic</b>	<b>Stable</b>	<b>Tactful</b>
Inquisitive	<b>Trusting</b>		<b>Open-Minded</b>
Responsible	<b>Sociable</b>		<b>Balanced Judgment</b>
<b>Conservative</b>	Reflective	Mobile	Firm
<b>Calculating</b>	Factual	Active	Independent
<b>Cooperative</b>	Calculating	Restless	Self-Willed
<b>Hesitant</b>	Skeptical	Alert	Stubborn
<b>Low-Keyed</b>	Logical	Variety-Oriented	Obstinate
<b>Unsure</b>	Undemonstrative	Demonstrative	Opinionated
<b>Undemanding</b>	Suspicious	Impatient	Unsystematic
<b>Cautious</b>	Matter-of-Fact	Pressure-Oriented	Self-Righteous
<b>Mild</b>	Incisive	Eager	Uninhibited
Agreeable	Pessimistic	Flexible	Arbitrary
Modest	Moody	Impulsive	Unbending
Peaceful	Critical	Impetuous	Careless with Details
Unobtrusive		Hypertense	



# NATURAL AND ADAPTED SELLING STYLE

*SAMPLE's natural selling style of dealing with problems, people, pace and procedures may not always fit the sales environment. This section is extremely important as it will identify if a salesperson's natural style or adapted style is correct for the current sales environment.*

Natural	PROBLEMS - CHALLENGES	Adapted
<p>SAMPLE is cautious in her approach to selling and does not attempt to demand that her view, or opinion, be accepted at face value. She likes to help the prospect solve their problems within the framework of a cooperative environment. She will look for a compromise.</p>		<p>SAMPLE sees no need to change her sales approach from her basic style as it is related to solving problems and challenges.</p>

Natural	PEOPLE - CONTACTS	Adapted
<p>SAMPLE's natural style is to use persuasion and emotion to the extreme. She is positive and seeks to win by the virtue of her oral skills. She will try to convince you that what she is saying is not only right, but is exactly what is needed. She displays enthusiasm for almost everything with every prospect.</p>		<p>SAMPLE sees no need to change her approach to influencing others to her way of thinking. She sees her natural style to be what the environment is calling for.</p>



# NATURAL AND ADAPTED SELLING STYLE

Natural	PACE - CONSISTENCY	Adapted
<p>SAMPLE is comfortable in a sales environment where she can sell to customers and provide service in a predictable environment. She prefers to sell products that have proven dependability in a territory that she knows.</p>		<p>SAMPLE feels to be most successful in her present environment she must follow up and follow through in a relaxed and patient manner. She will take the time to draw out the needs of her prospects.</p>

Natural	PROCEDURES - CONSTRAINTS	Adapted
<p>SAMPLE sees the need to be flexible about rules; however, she is also aware and sensitive to the consequence of not following those rules.</p>		<p>SAMPLE will apply original thinking and use an individualistic approach to selling. This approach can be seen by managers as very independent. SAMPLE will base her sales techniques and the probability of success rather than follow established methods.</p>



## ADAPTED STYLE

*SAMPLE sees her present work environment requiring her to exhibit the behavior listed on this page. If the following statements DO NOT sound job related, explore the reasons why she is adapting this behavior.*

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- Generating enthusiasm in others.
- Using persuasive skills.
- Building strong trust relationships with clients or customers.
- Using great social strengths in approaching new prospects.
- Being a dependable sales team member.
- Carefully avoiding conflict with customers or clients.
- Skillfully using humor to persuade her clients or customers.
- Exhibiting excitement about her service or product.
- Stressing service after the sale.
- Verbally stressing the benefits of her product or service.
- Meeting customers either formally or informally.
- Persistence in completing a sale.



## KEYS TO MOTIVATING

*This section of the report was produced by analyzing SAMPLE's wants. People are motivated by the things they want; thus, wants that are satisfied no longer motivate. Review each statement produced in this section with SAMPLE and highlight those that are present "wants."*

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### SAMPLE wants:

- Work assignments that provide opportunity for recognition. To
- be trusted.
- Public recognition of her ideas and sales results.
- Constant appreciation, and a feeling of security on the team.
- Rewards to support her dreams.
- Flattery, praise, popularity and strokes.
- Activities that don't infringe on family life.
- Identification with fellow salespeople.
- A manager who practices participative management.
- Freedom to talk and participate in sales meetings.
- Participation in meetings on future planning.



## KEYS TO MANAGING

*In this section are some needs which must be met in order for SAMPLE to perform at an optimum level. Some needs can be met by herself, while management must provide for others. It is difficult for a person to enter a motivational environment when that person's basic management needs have not been fulfilled. Review the list with SAMPLE and identify 3 or 4 statements that are most important to her. This allows SAMPLE to participate in forming her own personal management plan.*

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### SAMPLE needs:

- A warm and friendly work environment.
- The facts in a logical sequence.
- Shortcut methods that don't affect quality of the work. To
- be more direct and less subjective.
- A way to say "no" when she feels "no" to the demanding customers.
- Reassurances that she is doing the job right.
- Training to handle sales objections.
- Capable associates with which to work.
- Appreciation from the boss for the "price" paid to perform. A
- quality and time-tested product to sell.
- To set professional and family goals.
- A feeling of belonging--to know how important she is to the team.
- Methods to translate ideas into action.





## AREAS FOR IMPROVEMENT

*In this area is a listing of possible limitations without regard to a specific job. Review with SAMPLE and cross out those limitations that do not apply. Highlight 1 to 3 limitations that are hindering her performance and develop an action plan to eliminate or reduce this hindrance.*

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SAMPLE has a tendency to:

- Take criticism of her work as a personal affront.
- Not respond to objections with a projected confidence that meets buyer's expectations.
- Be family-oriented--may resist overnight traveling.
- Be slow to change--resists new ways of selling or prospecting.
- Not be as forceful in closing as the situation may call for.
- Wait for orders before acting.
- Not display a sense of urgency when pressured for results.
- Get in a "rut" of doing the same thing and calling on the same people.
- Give a false sense of compliance to superiors because she fights passively and you do not know she is in disagreement.



# ACTION PLAN

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The following are examples of areas in which SAMPLE may want to improve. Circle 1 to 3 areas and develop action plan(s) to bring about the desired results. Look over the report for possible areas that need improvement.

- |  |  |
|--|--|
| <input type="checkbox"/> Customer Service    | <input type="checkbox"/> Closing           |
| <input type="checkbox"/> Prospecting         | <input type="checkbox"/> Product Knowledge |
| <input type="checkbox"/> Preparation         | <input type="checkbox"/> Personal Goals    |
| <input type="checkbox"/> Presentation        | <input type="checkbox"/> Other             |
| <input type="checkbox"/> Handling Objections |  |

Area: \_\_\_\_\_

- 1.
- 2.
- 3.

Area: \_\_\_\_\_

- 1.
- 2.
- 3.

Area: \_\_\_\_\_

- 1.
- 2.
- 3.

Date to Begin: \_\_\_\_\_ Date to Review: \_\_\_\_\_



# BEHAVIORAL FACTOR INDICATOR™

Sales Version

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**SAMPLE**

4-1-2009



# INTRODUCTION

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The principal purpose of this report is to help you win, to achieve a greater success in life and work. Winners, throughout history, have had one thing in common -they know themselves. By reading your report you will gain insights about yourself. With these insights you can develop strategies to win in any environment.

Classifying selling behavior is not an easy undertaking, largely because there are so many variables on which classification could be based. The classifications in this report are purely behavioral. Behavioral measurement can be classified as HOW a person will do a job. To discover WHY, additional information must be collected.

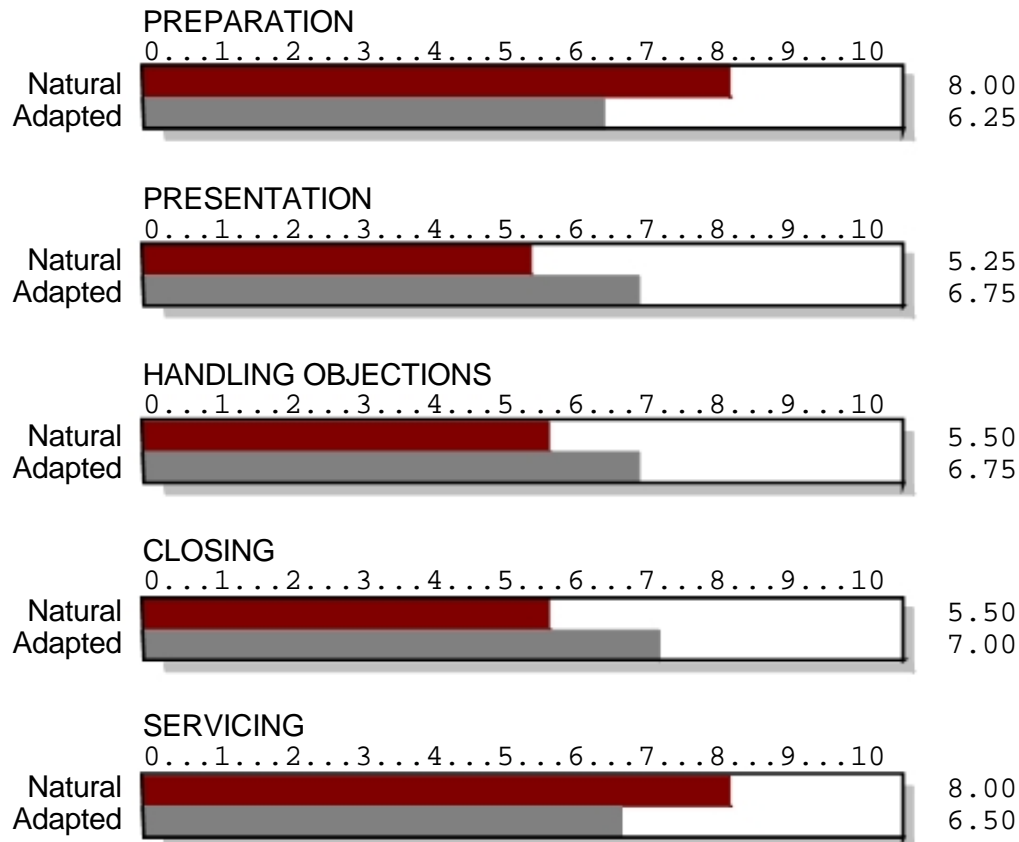
The Natural graph represents your natural behavior - the behavior you bring to the job. The Adapted graph measures your response to the environment - the behavior you think is necessary to succeed at a job. If your Adapted graph is significantly different from your Natural graph, you are under pressure to change or "mask" your behavior.

Read and compare your graphs. Look at each factor and the importance of that factor to the successful performance of your job. Your Adapted graph will identify the factors you see as important and shows you where you are focusing your energy.

Knowledge of your behavior will allow you to develop strategies to win in any environment you choose.

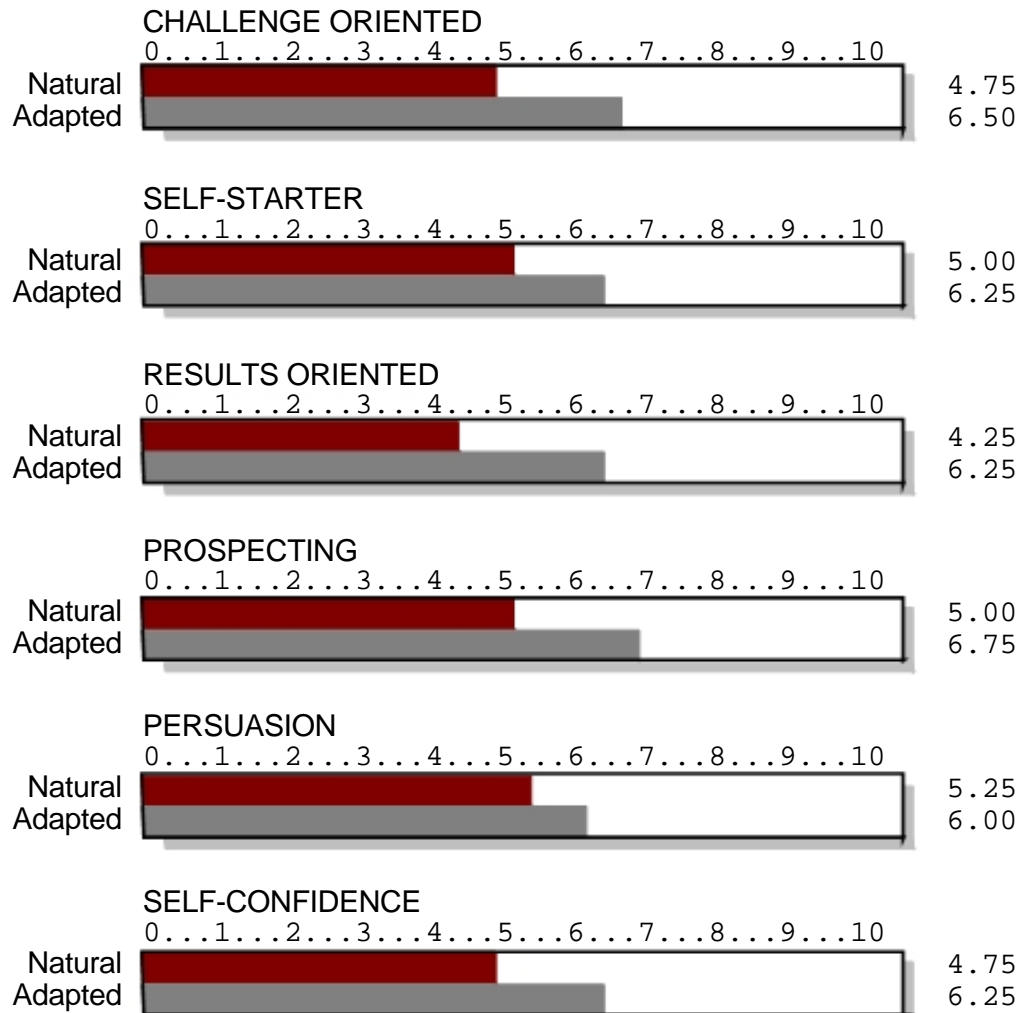


# GENERAL FACTOR ANALYSIS



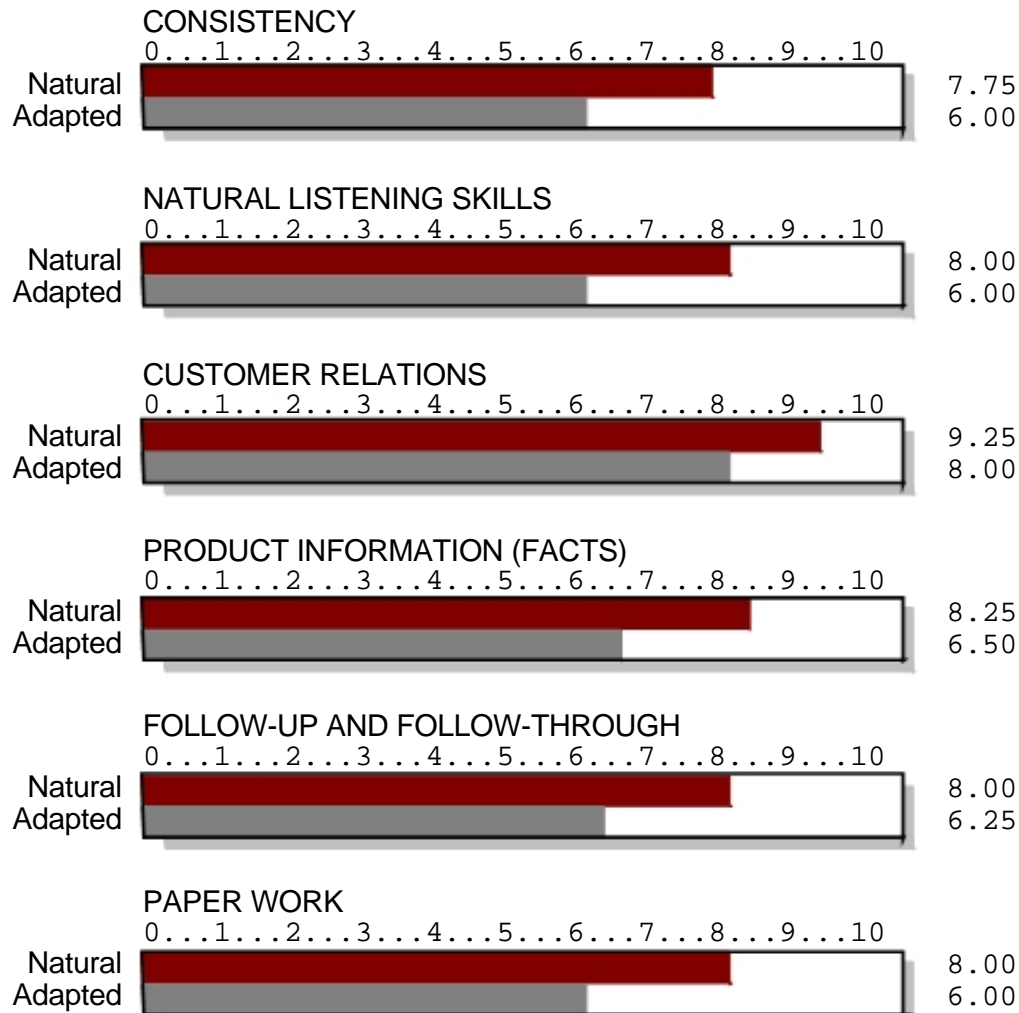


# SPECIFIC FACTOR ANALYSIS





# SPECIFIC FACTOR ANALYSIS



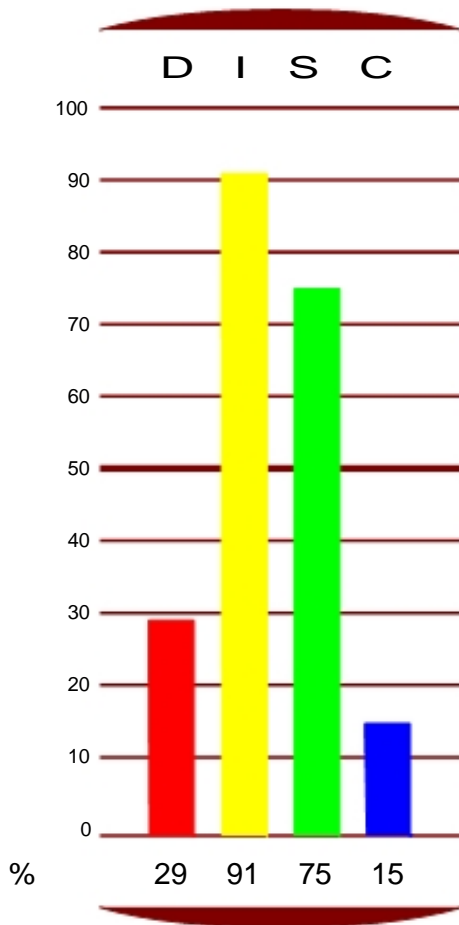


# STYLE INSIGHTS™ GRAPHS

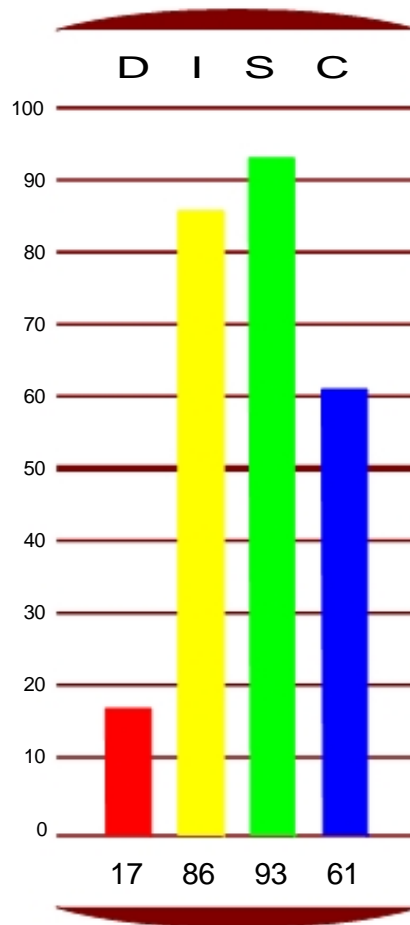
## SAMPLE

4-1-2009

MOST  
Graph I  
Adapted Style



LEAST  
Graph II  
Natural Style



Norm 2003





## THE SUCCESS INSIGHTS® WHEEL

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The Success Insights® Wheel is a powerful tool popularized in Europe. In addition to the text you have received about your behavioral style, the Wheel adds a visual representation that allows you to:

- View your natural behavioral style (circle).
- View your adapted behavioral style (star).
- Note the degree you are adapting your behavior.
- If you filled out the Work Environment Analysis, view the relationship of your behavior to your job.

Notice on the next page that your Natural style (circle) and your Adapted style (star) are plotted on the Wheel. If they are plotted in different boxes, then you are adapting your behavior. The further the two plotting points are from each other, the more you are adapting your behavior.

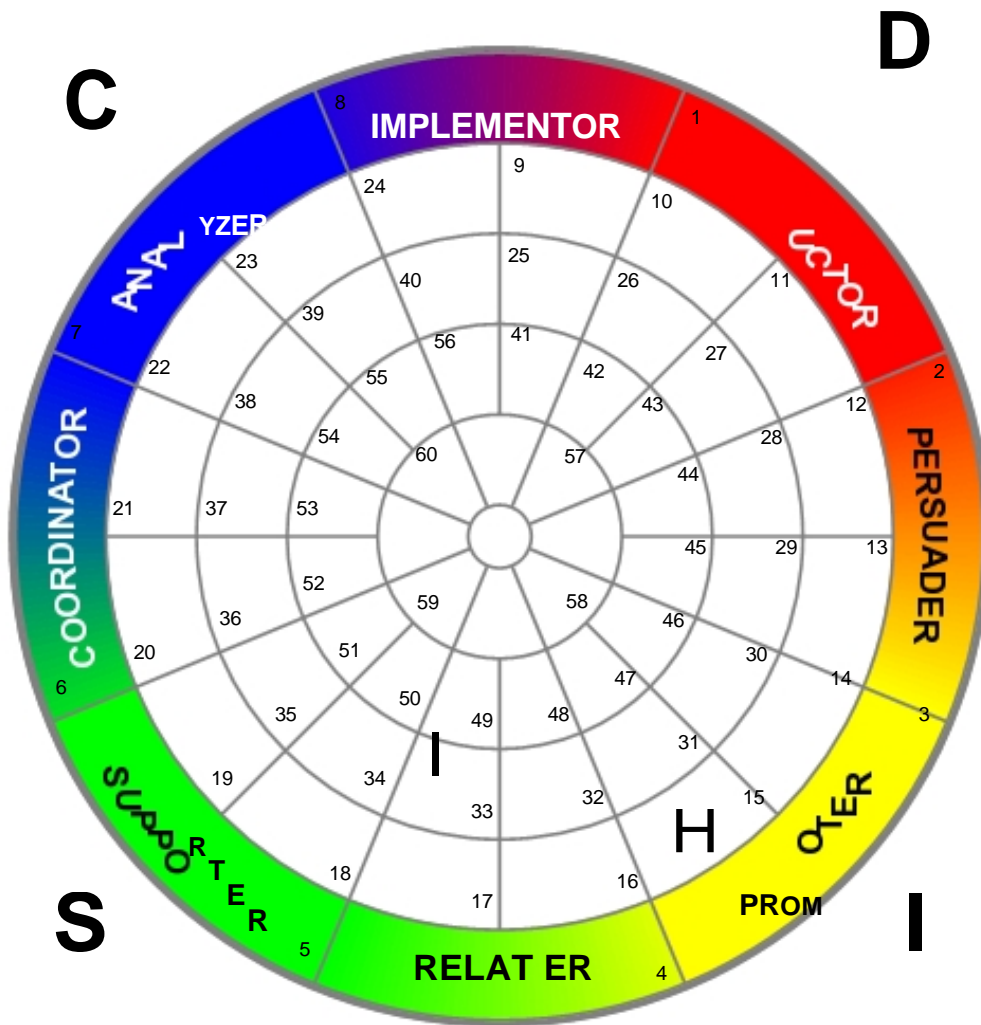
If you are part of a group or team who also took the behavioral assessment, it would be advantageous to get together, using each person's Wheel, and make a master Wheel that contains each person's Natural and Adapted style. This allows you to quickly see where conflict can occur. You will also be able to identify where communication, understanding and appreciation can be increased.



# THE SUCCESS INSIGHTS® WHEEL

SAMPLE

4-1-2009



Adapted: **H** (15) RELATING PROMOTER  
 Natural: **I** (33) SUPPORTING RELATER (FLEXIBLE)

Norm 2003