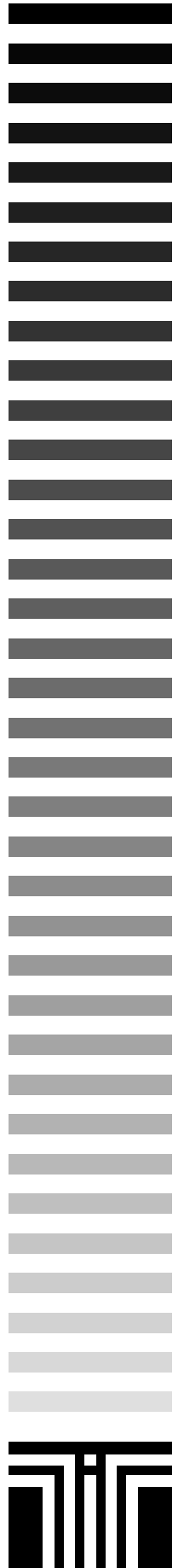


# INSIGHTS TO SALES™

*"Those who know others are learned.  
Those who know themselves are wise."  
—Lao Tse*

**John Doe**

3-25-2002



# INTRODUCTION

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.

A person's behavior is a necessary and integral part of who they are. In other words, much of our behavior comes from "nature" (inherent), and much comes from "nurture" (our upbringing). It is the universal language of "how we act," or our observable human behavior.

In this report we are measuring four dimensions of normal behavior. They are:

- how you respond to problems and challenges.
- how you influence others to your point of view.
- how you respond to the pace of the environment.
- how you respond to rules and procedures set by others.

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 from areas of behavior in which tendencies are shown. To improve accuracy, feel free to make notes or edit the report regarding any statement from the report that may or may not apply, but only after checking with friends or colleagues to see if they agree.

*"All people exhibit all four behavioral factors in varying degrees of intensity."  
-W.M. Marston*

# SALES CHARACTERISTICS

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

John may have difficulty selling the aggressive buyer who just wants to hear the "bottom line" benefits. His natural sales style is slower paced than what the aggressive buyer wants. Sometimes he prefers to sell tangible products over intangibles. Although he can probably sell either, he is more comfortable with products people can see and touch. One of John's sales strengths is his ability to listen to what the buyer is saying. He can display the patience required to allow the buyer the opportunity to explain his needs. He enjoys selling in a nonthreatening environment where he can service what he sells. Loyalty is important to him, and he willingly pays the price to develop a loyal relationship with his customers. John likes to build close relationships with his customers and prefers making repeat calls, as opposed to cold calls. He resists making cold calls preferring to work in the more predictable environment of repeat calls. He hesitates to sell new products until they have been proven by his own standards. He has standards by which he evaluates new products for his own use and applies these same standards in his sales approach. He operates well as a member of a sales team and will coordinate his sales efforts with others. Many see him as a good neighbor and he is willing to help those he considers to be friends.

John will avoid confrontation in his sales presentation. He may not even challenge a potential buyer who has been misinformed about his product or service. He will remain amiable and attempt to influence by using logic. Flexibility can be a problem with him. He prefers selling his way and may resist changing his presentation to meet the buyer's buying habits. He represents the type of salesperson who prepares before he makes a sales presentation. He wants complete knowledge of

# SALES CHARACTERISTICS

his product or service. If he is armed with knowledge and preparation, he will deliver a logical presentation. Occasionally, he spends too much time in the office. He uses this office time to meet his need for adequate preparation, since he becomes frustrated when prospects ask questions he can't answer. John's sales presentations can be time-consuming and drawn out. This can be either a strength or a weakness. The longer, drawn out presentation works best when selling a complex or expensive product. Objections raised by intimidating buyers will frustrate him. They are looking for direct answers to their objections, and he may feel threatened by their approach.

John may accept and agree with the buyer who isn't ready to buy today. Buyers who want to think it over are usually given the chance. He will call back to get their decision. He may side with the customer, if the customer is dissatisfied with the product or service. His basic approach to servicing is to make the customer happy. He usually responds slowly to resistance when he is closing. He doesn't like confrontation, so he will avoid the resistance if possible. He can become complacent with servicing the old accounts and not push hard enough for new business. Occasionally he might need more time for closing because he spent too much time on the presentation. He tends to use the soft-sell approach to closing. He won't close hard, but will continue to call on the account until he gets the sale. Persistence may be his best closing method.

# YOUR PERSONAL / PROFESSIONAL VALUE

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

- Conscientious and steady.
- Proficient and skilled in his technical specialty.
- Builds good relationships.
- Good at reconciling factions--is calm and adds stability.
- Works for a leader and a cause.
- Comprehensive worker.
- Accurate and intuitive.
- People-oriented.

# IDEAL ENVIRONMENT

*This section identifies the ideal work environment based on John'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 John enjoys and also those that create frustration.*

- Little conflict between people or customers.
- A stable and predictable environment.
- Prefers technical work, specialized area.
- An environment that allows time to change.
- Assignments that can be followed through to completion.
- Needs personal attention from his sales manager and compliments for each assignment well done.
- An environment in which he may deal with people on a personal, intimate basis.
- Familiar work environment with a predictable pattern.
- An environment where he can use his intuitive thinking skills.

# 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 John. Read each statement and identify the 3 or 4 statements which are most important to him. We recommend highlighting the most important "DO's" and provide a listing to those who communicate with John most frequently.*

Do:

- Watch carefully for possible areas of early disagreement or dissatisfaction.
- Make an organized presentation of your position, if you disagree.
- Provide solid, tangible, practical evidence.
- Follow through, if you agree.
- Present your case softly, nonthreateningly with a sincere tone of voice.
- Make an organized contribution to his efforts; present specifics, and do what you say you can do.
- Show sincere interest in him as a person; find areas of common involvement; be candid and open.
- Support his principles; use thoughtful approach; build your credibility by listing pros and cons to any suggestion you make.
- Draw up a scheduled approach to implementing action with a step-by-step timetable; assure him that there won't be surprises.
- Give him time to verify reliability of your actions; be accurate, realistic.
- Look for hurt feelings, personal reasons, if you disagree.
- Give him time to be thorough, when appropriate.

# **DON'TS ON COMMUNICATING**

*This section of the report is a list of things NOT to do while communicating with John. Review each statement with John 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.*

Don't:

- Force him to respond quickly to your objectives; don't say "Here's how I see it."
- Use testimonies of unreliable sources; don't be haphazard.
- Patronize or demean him by using subtlety or incentive.
- Debate about facts and figures.
- Leave things to chance or luck.
- Be domineering or demanding; don't threaten with position power.
- Push too hard, or be unrealistic with deadlines.
- Manipulate or bully him into agreeing because he probably won't fight back.
- Dillydally.
- Be abrupt and rapid.
- Rush the decision-making process.
- Threaten, cajole, wheedle, coax or whimper.
- Use gimmicks or clever, quick manipulations.

# SELLING TIPS

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

When selling to a person who is ambitious, forceful, decisive, strong-willed, independent and goal-oriented:

- Be clear, specific, brief and to the point.
- Stick to business. Give an effective presentation.
- Come prepared with support material in a well-organized "package."

Factors that will create tension:

- Talking about things that are not relevant to the issue.
- Leaving loopholes or cloudy issues.
- Appearing disorganized.

When selling to a person who is magnetic, enthusiastic, friendly, demonstrative and political:

- Provide a warm and friendly environment.
- Don't deal with a lot of details, unless they want them.
- Provide testimonials from people they see as important.

Factors that will create tension:

- Being curt, cold or tight-lipped.
- Controlling the conversation.
- Driving on facts and figures, alternatives, abstractions.

# SELLING TIPS

When selling to a person who is patient, predictable, reliable, steady, relaxed and modest:

- Begin with a personal comment--break the ice.
- Present yourself softly, nonthreateningly and logically.
- Earn their trust--provide proven products.

Factors that will create tension:

- Rushing headlong into the interview.
- Being domineering or demanding.
- Forcing them to respond quickly to your questions.

When selling to a person who is dependent, neat, conservative, perfectionist, careful and compliant:

- Prepare your "presentation" in advance.
- Stick to business--provide fact to support your presentation.
- Be accurate and realistic--don't exaggerate.

Factors that will create tension:

- Being giddy, casual, informal, loud.
- Wasting time with small talk.
- Being disorganized or messy.

# PERCEPTIONS

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

"See Yourself As Others See You"

## SELF-PERCEPTION

John usually sees himself as being:

Considerate  
Good-Natured  
Team player

Thoughtful  
Dependable  
Good listener

## OTHERS' PERCEPTION

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

Nondemonstrative  
Unconcerned

Hesitant  
Inflexible

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

Possessive  
Detached

Stubborn  
Insensitive

# TIME WASTERS

*This section of the report is designed to identify time wasters that may impact John's overall time use effectiveness. Possible causes and solutions will serve as a basis for creating an effective plan for maximizing his use of TIME and increasing PERFORMANCE.*

## 1. HABITS

A habit is a specific thought, behavior or way of doing something that was acquired by repetition or by reinforcement from self and/or others.

### POSSIBLE CAUSES:

- Have established routines that are comfortable
- Routine creates a feeling of security
- Resist change for change's sake
- Have been praised repeatedly for a specific behavior

### POSSIBLE SOLUTIONS:

- Evaluate habits and decide which contribute to your accomplishments and which deter you from success
- Try new ways of performing a certain task
- Ask others for recommendations on different approaches
- Consciously practice changing your routine

## 2. FAILURE TO CLARIFY PRECISE RESPONSIBILITIES WITH MANAGER

The failure to clarify precise responsibilities with your manager assumes that you have a full understanding of his/her expectations. It infers that your manager understands your job and concurs with your assessment of requirements.

### POSSIBLE CAUSES:

- Unsure of how you will be perceived
- Don't want to overstep authority
- Want to be a team player
- Want to help everyone so you don't object to the manager when requests are being made that are not your responsibility

### POSSIBLE SOLUTIONS:

- Have informal conversations with the manager about his/her expectations
- Share with manager your expectations
- Clarify with peers and other managers your duties and responsibilities
- Read and discuss articles on "management by objectives"

# TIME WASTERS

## 3. NOT EXERCISING AUTHORITY

Not exercising authority is the inability to make decisions that might adversely impact some people and compromises the success of task accomplishment. It is also the resistance to making the tough calls.

### POSSIBLE CAUSES:

- Want to be seen as supportive
- Believe people will do what is right
- Fear offending others
- Fear creating conflict between team members

### POSSIBLE SOLUTIONS:

- Have clearly defined and written performance objectives
- Have clearly written rationale for specific decisions
- Assign decision reporting to the deputy/assistant
- Appoint a strong deputy or assistant
- Have a "Good Guy/Bad Guy" image agreement with deputy/assistant

## 4. RESISTING CHANGE

Resisting change is the process of consciously or subconsciously not participating in the change process. Measures of resistance may be active or passive, not doing things the new way, or making excuses for not having tasks accomplished.

### POSSIBLE CAUSES:

- Need a high degree of security
- Like to maintain the status quo
- Routine/procedures have worked in the past
- One specific aspect of a proposed change violates sense of values
- A specific change is not seen as contributing to successful accomplishments

### POSSIBLE SOLUTIONS:

- Acknowledge that change is a natural part of any job
- Develop the habit of writing down all of the pros and cons of a specific change
- Evaluate each objection to a change
- If there is one specific objection that is overriding the ability to change, share the specific concern with those involved and seek advice or input from others

# TIME WASTERS

## 5. POSTPONE THE UNPLEASANT

Postponing the unpleasant is similar to procrastinating but is usually a continual reprioritizing of daily tasks. It is often a way to delay something that is not enjoyable.

### POSSIBLE CAUSES:

Like low-conflict environments and relationships

Want to feel the success of accomplishment so the simple tasks are done first

### POSSIBLE SOLUTIONS:

Change your routine and, for one week, do the unpleasant tasks first

See the accomplishment of unpleasant tasks as an equal or even greater achievement of success

Reward yourself for every unpleasant task that you complete without postponing

Confront those people who are causing you discomfort and discuss the problems

## **ADAPTED STYLE**

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

- Adaptable in meeting the needs of clients or customers.
- Using a calculated approach during presentations.
- Being a good listener.
- Using great social strengths in approaching new prospects.
- Cautious in potentially risky sales situations.
- Remaining cooperative in meeting the customer's needs.
- Presenting an agreeable demeanor to clients or customers.
- Generating enthusiasm in others.
- Skillfully using humor to persuade his clients or customers.
- Excited about available new products or services.
- Using humor as a way of coping with conflict.
- Exhibiting excitement about his service or product.
- Using persuasive skills.

# NATURAL AND ADAPTED SELLING STYLE

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*John'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.*

## PROBLEMS - CHALLENGES (Natural)

John is somewhat conservative in his approach to solving problems and usually doesn't push potential prospects to make quick high-risk decisions. He will accept challenges by being quite calculating in his response to the challenge. He will be quite cooperative by nature and attempt to avoid confrontation as he wants to be seen as a salesperson who is "easy" to work with.

## PROBLEMS - CHALLENGES (Adapted)

John sees no need to change his sales approach from his basic style as it is related to solving problems and challenges.

## PEOPLE - CONTACTS (Natural)

John is sociable and optimistic. He is able to use an emotional appeal to convince others of a certain direction. He will trust others and likes a positive environment in which to sell.

## PEOPLE - CONTACTS (Adapted)

John projects a positive and enthusiastic attitude toward influencing others. He sees the need to be trusting and wants to be trusted.

# NATURAL AND ADAPTED SELLING STYLE

## PACE - CONSISTENCY (Natural)

John's natural style prefers a sales environment that can take advantage of his relaxed demeanor, and patience is looked at as a requirement to win. He enjoys follow-up and follow-through. He resists selling new products until proven to his standards.

## PACE - CONSISTENCY (Adapted)

John feels that the sales environment doesn't require him to alter the way he deals with activity level and consistency.

## PROCEDURES - CONSTRAINTS (Natural)

John is comfortable on a sales team that sells high quality, desirable products. He will not exaggerate on the facts and data and wants his prospects to hear all the facts and figures in the sales process. He will follow company policy even if others fail to do so.

## PROCEDURES - CONSTRAINTS (Adapted)

The difference between John's basic and adapted sales style is not significant and he sees no need to change on this factor.

# KEYS TO MOTIVATING

*This section of the report was produced by analyzing John'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 John and highlight those that are present "wants."*

John wants:

- Rewards to support his dreams.
- Freedom to talk and participate in sales meetings.
- To work with people with whom he can trust.
- Time to think out his plan and follow through.
- A friendly work environment.
- A secure future.
- Public recognition of his ideas and sales results.
- Flattery, praise, popularity and strokes.
- To be trusted.
- Participation in meetings on future planning.
- Freedom from control and detail.

# KEYS TO MANAGING

*In this section are some needs which must be met in order for John to perform at an optimum level. Some needs can be met by himself, 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 John and identify 3 or 4 statements that are most important to him. This allows John to participate in forming his own personal management plan.*

John needs:

- An exact job description and expectations in writing.
- Conditioning prior to change.
- Explanations for sales objections.
- A warm and friendly work environment.
- The facts in a logical sequence.
- To be introduced to new prospects.
- A sales presentation that is planned.
- Time to see and test if the plan will work.
- Tangible things to sell.
- A manager who prefers quality over quantity.
- Complete instructions on his assignments.
- A work environment without much conflict.

# STRENGTHS AND WEAKNESSES

*John's behavioral work style may or may not be compatible with other team members. Each team member brings their own strengths and weaknesses. This section of the report allows his strengths and weaknesses to be analyzed. Read and share these statements with other team members. Remember, a strength can turn into a weakness if overextended.*

- STRENGTH - Good listener. POTENTIAL WEAKNESS - May be possessive of information.
- STRENGTH - Task-oriented. POTENTIAL WEAKNESS - May bury himself in the task and fail to deal with people problems in a timely fashion.
- STRENGTH - Stable and persistent. POTENTIAL WEAKNESS - Be relaxed and contented with things the way they are.
- STRENGTH - Predictable and reliable. POTENTIAL WEAKNESS - May be inflexible and resist change.
- STRENGTH - Will work for a cause and a leader. POTENTIAL WEAKNESS - May procrastinate on decisions when in the leadership role.