

ASSESSMENT AND RECOMMENDATIONS

Mr. George Test
Candidate – Sales Representative
United Techmatic
March 10, 2006

SUMMARY AND IMPLICATIONS**Position Requirements**

The Sales Representative position at United Techmatic requires a “hunter” profile, including substantial new business development, growth of existing accounts, and personal responsibility for revenue growth.

Summary

Mr. George Test tests and interviews in the high end of the “Drive” profile (scores range from 1 to 10). Specifically:

Need for Achievement

Interview score: 9

Mr. Test has burning ambition. He has a vision of achieving ever more success, and doing whatever it takes, in the positive sense, to move to the top of his profession.

Competitiveness

Interview score: 8

Mr. Test is fiercely competitive, in fact so much so that he can tend to eschew mentoring junior salespeople in favor of staying focused on his interests alone. Still, competitiveness cannot be taught . . . the benefits of teamwork can (see below).

Optimism

Interview score: 8

Mr. Test is supremely optimistic in his own abilities, almost to the point of arrogance. He also has a thick skin, an excellent ingredient for a salesperson who will inevitably experience rejection, and, occasionally, criticism from demanding customers.

Suggestions for Development

In terms of development, Mr. Test is most likely to listen to suggestions that he perceives will satisfy his need for achievement. For example, just telling him to be a “team player” won’t cut it. On the other hand, showing him specific examples, with hard data, of how team leaders have generated more personal income than lone workers, is likely to get his attention.

Mr. Test will also benefit from injecting a dose of humility into his turbocharged self-confidence. This will come through mentoring by a person he respects. The key is convincing him that humility is appealing, and will make him more powerful than ever in the process.

Finally, Mr. Test is a “perfectionist.” Perfectionists, as a rule, tend to under delegate and obsess (waste time) over low-leverage details. Perfectionism is also hard on friends and family. A

The Fine Print—This report is an assessment of the key sales skills identified by this company's management. This data should not be used *exclusively* to make personnel decisions and should be used in combination with other job-related input. This assessment is confidential. Its primary purpose is to guide a person's development, and to assure job placements with a high probability of success. In order to obtain maximum benefit from this report, we suggest: -Feedback is given by the consultant to the individual to discuss a complete interpretation. -The consultant discusses management and development strategies with the individual's manager. -This report is made available only to those responsible for development of the person, and is filed confidentially. -You should consider this report as current for a maximum of 3 years.

perfectionist will not change behavior overnight, but pointing out how this behavior can affect performance will be beneficial, and reference to several tools and books listed below may be helpful as well.

Conclusions

Based on his performance in the sales assessment, George is recommended for the position with reservations. Our reservations pertain most strongly to his need to balance his ambition with an awareness of the needs of his colleagues and customers. Nonetheless, George has the Drive to succeed as a hunter/salesperson. In the course of making your decision, pay particular attention to cultural match . . . lone wolves can be big producers, but can also upset a classic team environment.

CANDIDATE RECOMMENDATION		CHANCE OF SUCCESS
RECOMMEND	Good job match. Minimal development needed.	>90%
RECOMMEND (RESERVATIONS)	Good job match. Some development needed.	>80%
NOT RECOMMEND	Skill mismatch, or high risk of performance problems.	<80%

SKILL SUMMARY AND DEVELOPMENT SUGGESTIONS				
Skills		What Needs Development	Develop ability	Suggestions
Core Skills				
Drive Needs to achieve; loves to compete and win; certain of victory	G		Nil	
Confidence Unfazed by rejection; will persist despite setbacks; inner strength	G		Low	
Persuasion Articulate; builds a good case, taking customer needs into account; closes compellingly	G		Med	
Relationship Easily establishes and maintains relationships with prospects and customers	Y	Still learning techniques for building initial rapport with the client; can become so task-focused that he does not take time to connect on a personal level	Med	<ol style="list-style-type: none"> 1. Sales manager coaches the salesperson on relationship building techniques. 2. Salesperson seeks advice from three world-class schmoozers. 3. Salesperson reads <i>Mr. Schmooze</i> by Richard Abraham (http://www.mrshmooze.com/) 4. Salesperson attends the Wilson Learning <i>Managing Interpersonal Relationships</i> Course (www.strategiceenhancement.com). [\$1009] 5. Salesperson attends the <i>Basic</i> and <i>Interpersonal Intensive</i> seminars offered by Life Success (www.lifesuccessseminars.com). [\$1700] 6. Salesperson receives 360° feedback from colleagues and customers (http://www.witmerassociates.com/content.php?ID=19). [\$95]
Organization Disciplined; tracks opportunities & contacts; follows up; juggles multiple tasks	Y	Still learning how to delegate work to junior-level consultants where possible; can have trouble multitasking several priorities under pressure	Med	<ol style="list-style-type: none"> 1. Sales manager coaches time management skills. 2. Salesperson attends training on contact management software (Outlook, Goldmine, Act). 3. Salesperson attends training in the use of time management planner (www.franklinecovey.com, www.timedesign.com). [\$200] 4. Salesperson uses a personal organization coach (www.effectiveedge.com). [\$5000] 5. Salesman copies the organization methods used by a highly organized coworker and spends a half-day every quarter to organize his office. 6. Salesperson receives 360° feedback from colleagues and customers (http://www.witmerassociates.com/content.php?ID=19). [\$95]

SKILL SUMMARY AND DEVELOPMENT SUGGESTIONS

Skills	What Needs Development	Develop ability	Suggestions
Specialized Skills			
Problem Solving Proactively, sometimes creatively, seeks solutions; solves customer dilemmas	G	Low	
Listening Patient, tunes in, will probe and clarify to get a real sense of customer needs	Y	Med	1. Salesperson attends the Wilson Learning <i>Counselor Salesperson</i> seminar (www.strategiceenhancement.com). [\$1334] 2. Salesperson attends the Zehren-Friedman Associates <i>Sophisticated Selling Skills</i> seminar (www.zehrenfriedman.com). [In-house seminar] [\$ varies] 3. Salesperson works with HR/training to help teach courses in <i>Active Listening</i> . 4. Salesperson orders e-Learning courses <i>Listening Skills</i> and <i>Thinking on Your Feet</i> (http://www.netg.com/Catalog , 877-561-6384). [\$110] 5. Salesperson receives 360° feedback from colleagues and customers (http://www.witmerassociates.com/content.php?ID=19). [\$95]
Strategic See big picture and long-range implications; understands customers' strategies	G	Med	
Executive Presence Earns respect in the executive suite; appropriate image	Y	Low	1. Sales manager provides candid feedback on personal image, appearance, grooming, smoking, etc. 2. Salesperson engages a personal image consultant. [\$ Varies] 3. Salesperson attends the Executive Presentations seminar to polish standup skills (www.communispond.com) [\$1200] 4. Salesperson receives 360° feedback from colleagues and customers (http://www.witmerassociates.com/content.php?ID=19). [\$95]
Motivator Will teach, coach, motivate those who sell product to end user	R	Med	1. Sales manager clearly defines expectations and the role of the sales leader. 2. Salesperson attends the <i>Basic</i> and <i>Interpersonal Intensive</i> seminars offered by Life Success (www.lifesuccessseminars.com). [\$1700] 3. Salesperson receives 360° feedback from colleagues and customers (http://www.witmerassociates.com/content.php?ID=19). [\$95]

[**Note:** This report is based on a subset of skills identified as critical for this position. There are a total of 17 possible skills available for customization.]

(G) Green/Skilled	(Y) Yellow/Develop	(R) Red/Risk
-------------------	--------------------	--------------