

# **THE PERSONAL ORIENTATION PROFILE™ (POP™ Version 7.0)**

A Validated Selection Profiling System  
For Sales And Sales Management Personnel



**SELECTION, COACHING AND RETENTION  
OF THE COMPETITIVE SALESPERSON**

## **INTERPRETATION GUIDE**

**SELFMANAGEMENT**  
**GROUP**  
SELECT | DEVELOP | RETAIN | TOP PERFORMERS

## Table of Contents

Subject	Page
Introduction	2
Science of Normative Profiling	2
<b>POP Version 7 Report</b>	4
Science Page	5
Summary of Scores & Cautions	6
Enterprising Potential	7
Achievement Potential	8
Independence Potential	9
Predictor Score	11
People Orientation	12
Investigative Orientation	13
Attitudes & Opinions (SD, LM, CR, LS UC)	14
Snapshot of Sales Potential	16
Management Preview	17
Selection Considerations	18
Interview Questions	19
Responses from Attitudes & Opinions	20
Training & Coaching Suggestions	21
Retention Considerations	22
<b>Candidate Feedback Report</b>	23
Overview of Strengths	24
What to Seek/Avoid in Careers	25
<b>Personal Coaching Guide</b>	26
<b>Manager's Coaching Guide</b>	30
<b>Appendix Exploring High Uncertainty Scores</b>	36

# INTRODUCTION

## The Personal Orientation Profile™

The Personal Orientation Profile™ (**POP™ Version 7.0**) is a psychometric assessment tool designed to fill the essential role of integrating science into recruiting, selection and development of competitive sales people.

The **POP™ Version 7.0** assesses self management potential, motivational structure, organizational fit, people orientation, approach to learning needs, communications style, confidence, lifestyle management , managing call reluctance and many other key factors that are common traits in successful competitive sales people. It also provides extensive coaching reports for the sales representative and the representative's coach or sales manager.

### The Personal Orientation Profile™ :

- Predicts sales performance
- Measures key source traits associated with success in sales
- Provides coaching insights to improve development and retention
- Highlights training needs
- Provides useful career management feedback to candidate
- Is statistically validated using each organization's unique performance criteria

## Profiling for Selection, Performance and Retention in Competitive Sales

The POP™ has an enviable record as an important part of selecting individuals who will be top performers and survive in highly competitive sales environments. A significant number of successful competitive sales management teams use the POP™ as an integral part of their selection process.

NB. We recommend that the POP be part of a well rounded selection process that includes a structured, behavioral based competency interview as well as an unstructured interview to evaluate the candidate's fit to the opportunity.

## The Science of Normative Profiling

The original Personal Orientation Profile (POP™) (which is the basis for all Self Management Group profiles) is a personal profiling instrument that has been used to profile and track the careers of over a million people active or seeking employment in competitive sales careers such as financial services, automotive sales, manufacturing, pharmaceutical and many other sales cultures.

The POP™ is used by organizations world wide to select, develop and retain top sales performers. It has been validated in hundreds of different sales cultures. With this quantity and quality of data, in many unique sales cultures, the POP™ has been used to develop predictive models for specific industries and specific companies.

The **POP™ Version 6.0** allows your company immediate use of our insight into competitive selling with the option of building the right profile for your company through the ongoing validation process.

The Personal Orientation Profile (**POP™ Version 7.0**) psychometric profile measures the inherent potential or source traits of an individual. It also indicates communication styles and attitudes.

It is used by individual sales people to better understand their inherent strengths and how to build on them for improved performance in their sales careers. It is used by sales managers and coaches to select and coach sales people.

The **POP™ Version 7.0** and The Self Management Group's other profiling and training systems are available on-line or can be scored in your office. Visit our website [www.self-management.com](http://www.self-management.com)

## **This Interpretation Guide is designed to:**

- assist in interpreting the **POP™ Version 7.0** Report;
- help use profile results effectively in the recruiting and selection of competitive sales personnel; and
- provide coaching, development and mentoring strategies.

The **Personal Orientation Profile™** is part of the sales representative selection process. It will help identify the best candidates for sales positions and provide coaching and development guidelines. It is validated and follows ADA, EEOC and EU guidelines with respect to privacy and minority groups. The format is easy to follow. This guide will take you through each part of the test and provide you with understanding of the profile and hints on how to effectively apply the information to select, coach and develop top performers in sales roles.

## **Processing the Personal Orientation Profile™**

Each company determines its own policy on how to access our profiles so we recommend that you contact your head office for specific instructions on how to get your profiles scored. The following are the most popular approaches.

### **Internet/Web based**

The candidate completed the profile on the internet which provides flexibility and ease of access from a number of locations.

### **Paper/Pencil**

If candidate does not have access to the internet, the paper version may be used and the results entered on-line by a corporate administrator.

NB. We recommend capturing the profiles on the internet for ease of use, flexibility in viewing reports, accounting and validation studies.

If none of the above options are suitable, you may mail or fax the completed questionnaire to:

**The Self Management Group.  
155 Rexdale Blvd., Suite 304  
Toronto, Ontario M9W 5Z8**


**Fax # 416-746-6757**

**For assistance please call us at 1-800-760-9066.**

**NB:** To avoid delays and long distance calls, make sure that the person administering the Personal Orientation Profile™ checks to ensure all questions have been answered.


## The Personal Orientation Profile™ Report (POP™ Version 7.0)


POP 7 reporting is accessed by the **View Reports** function in the Profile Administration Center (the same as all SMG profiles). When user has found correct candidate, click on the name and request the Manager's Report. This will open up the Cover Page (see below). From this page, the user can view all other reporting.

  
**PERSONAL ORIENTATION PROFILE - POP™**  
**VERSION 7.0**

CONTENTS	Page
<input checked="" type="checkbox"/> P.O.P. Science Score	2
<input checked="" type="checkbox"/> Summary of Scores & Cautions	3
<input checked="" type="checkbox"/> P.O.P. Snapshot of Sales Potential	4
<input checked="" type="checkbox"/> Management Preview	6
<input checked="" type="checkbox"/> Selection Considerations	7
<input checked="" type="checkbox"/> Interview Questions	8
<input checked="" type="checkbox"/> Responses from Opinions Section	15
<input checked="" type="checkbox"/> Training & Coaching Suggestions	16
<input checked="" type="checkbox"/> Retention Prospects	17
<input checked="" type="checkbox"/> Candidate Feedback	18

---

 [Coaching Guide for Managers](#)

 [Feedback Guide for Individuals](#)

---

**#ABABABAB**  
2005/02/25  
  
Name: Sample Sample  
Telephone:  
Email: [sample@sample.com](mailto:sample@sample.com)  
Requested By: SMG Admin

©1993-2005 Selection Testing Consultants International Ltd.

The cover page of the management report is pictured here. It has the **Contents** listed and the page number of the report where that section can be found.


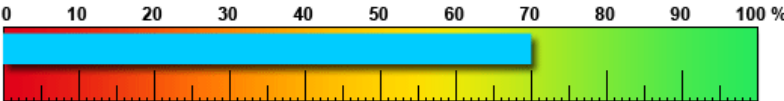
The various sections may be toggled on off so that the report created focuses on any or all of those sections that the manager cares to view.



There are also two hyperlinks on the cover page that link to reports customized to the needs of the individual. These are the **Coaching Guide for Managers** and the **Feedback Guide for Individuals**

## Management Report POP Science Score Page

This page provides colorful graphics to provide a quick insight into whether or not it is a strong candidate to and overall probability of success.

Personal Orientation Profile 7.0		P.O.P. Science Score	
<b>OVERALL RECOMMENDATION</b>			
		PROCEED WITH EXTREME CAUTION PROCEED WITH CAUTION <b>PROCEED</b>	
<b>PROBABILITY OF SUCCESS</b>			
			
<b>P.O.P. SCIENCE SCORE</b>			
	Score		Rating
<b>EP = Enterprising Potential</b> Predicts Daily Activity and Survival	<u>64</u>	If EP is 60 or higher 5 If EP 40 - 59 4 If EP 20 - 39 3 If EP is less than 20 2	<u>5</u>
<b>AP = Achievement Potential</b> Describes Motivational Factors and Predicts Closing Style	<u>15</u>	Subtract 1 if: AP is less than -5 or IP is less than -25	<u>0</u>
<b>IP = Independence Potential</b> Describes the Comfort and Need for Structure and Systems	<u>17</u>		
<b>SD = Self Directed</b> Reflects Feelings of Being in Control	<u>39</u>	Subtract 1 if: SD is less than 25 or CR is less than 30	<u>0</u>
<b>CR = Call Reluctance</b>	<u>33</u>		
		<b>FINAL POP™ RATING (min. 1)</b>	<u>5</u>
<b>Science Rating</b>			
5 Excellent	4 Above Average	3 Average	2 Proceed with Caution
Proceed			1 Redirect

©1993-2005 Selection Testing Consultants International Ltd.

OVERALL RECOMMENDATION provides a quick visual overview of the candidate's suitability for the sales culture of the client.

It begins with a color coded traffic light that indicates whether or not to proceed with the candidate or to proceed with caution.

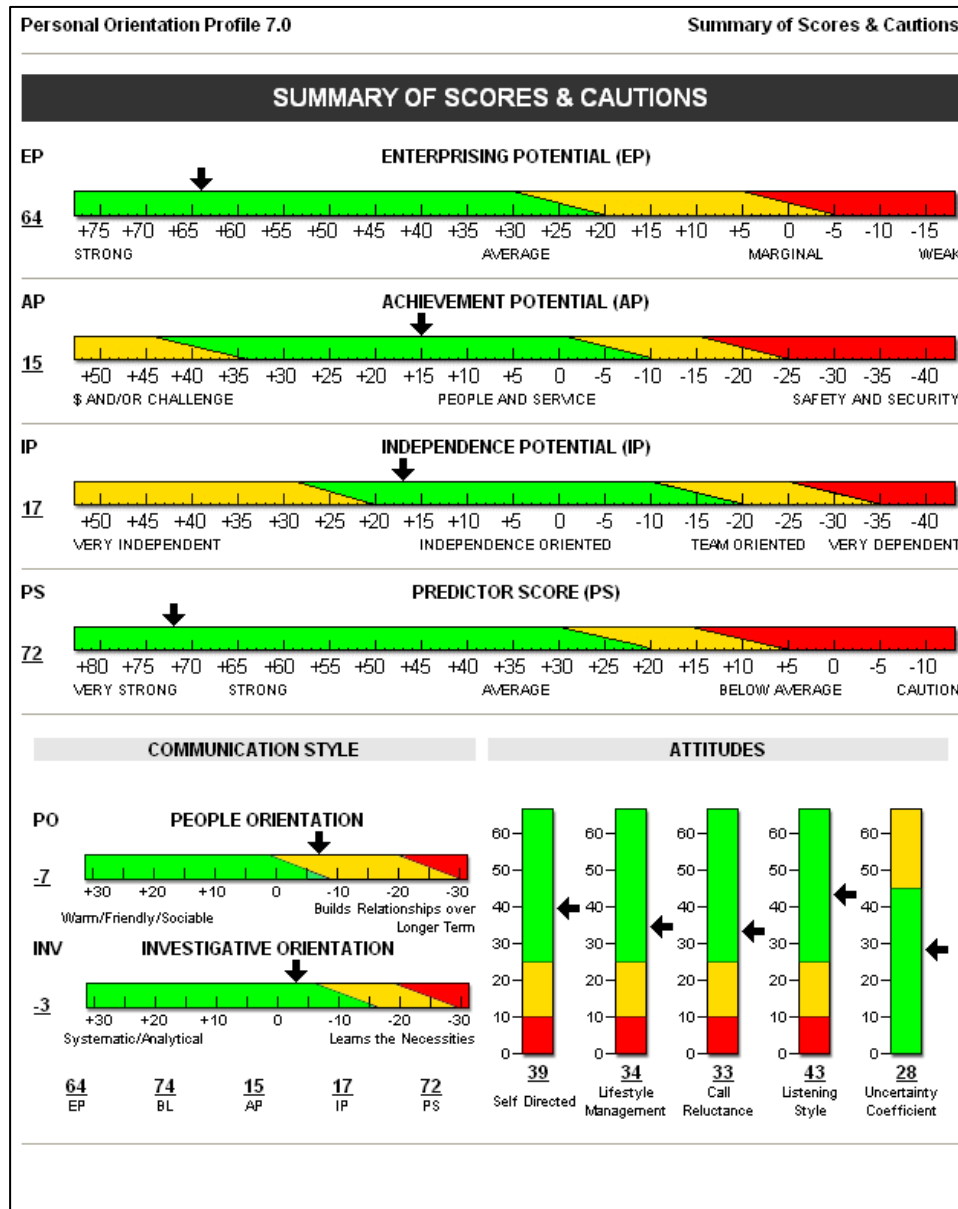
PROBABILITY OF SUCCESS is another graphic representation of probable success based on the candidate's overall competitive nature.

POP SCIENCE SCORING is a science score based on the actual data of the client's sales culture.

The formula used is shown and a score from 1 to 5 is calculated which becomes part of the selection process and is typically integrated with a structured, behavioral focused competency interview and an unstructured fit interview.

# Management Report

## Summary of Scores & Cautions



This Summary of Scores and Cautions page provides a graphic representation of the candidate's personality traits and the attitudes which are important in a sales person.

This is the page that will be most helpful to use when discussing a profile with your SMG consultant.

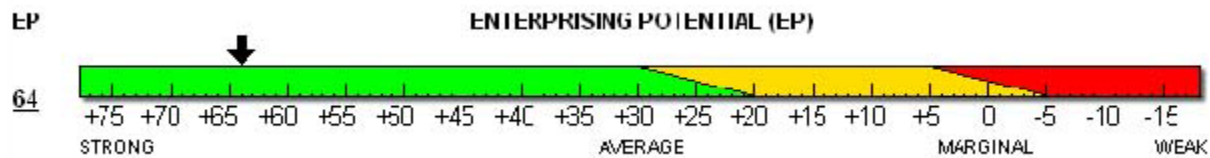
In general, the horizontal graphs are representations of the individual's source personality traits. These are based on 168 items with low face validity which are arranged into 8 trait scales. The source personality traits remain relatively stable in normal people and are unlikely to change significantly over time.

The vertical graphs are attitude scales which reflect how the person feels at the point in time which he or she completed the POP questionnaire. Attitudes can change based on circumstances.

All scales have green, amber and red zones. Each of these represents respectively: ideal range; mild caution and strong caution. Each of the scales are discussed in detail in the following pages.

## Interpreting the Scales on the Summary of Scores & Cautions Page

### ENTERPRISING POTENTIAL



The EP or Enterprising Potential Scale is one of the most important POP scales. It measures the degree to which an individual is self managed. It is a continuum from very proactive on the left to responsive/process oriented on the right end of the scale.

This scale assesses the potential of the candidate for personal planning, time management and self management to achieve specific goals. It predicts the degree of focusing of personal effort to achieve these goals.

It evaluates the capacity of the person to focus his/her efforts on tasks to attain daily activity related objectives.

This is the major contributor to the prediction of survival in competitive sales because strong self managers are good at initiating activity such as prospecting and taking control of the sales process. When strong self management is combined with motivation (measured by AP), the individual tends to be very goal oriented, focused and resilient.

Scores on this scale should be interpreted as follows:

>60	<b>Very Strong</b> self-management potential; proactive; fast paced, makes decisions quickly; gives little feedback; needs little feedback – may be impatient and directive
40 to 60	<b>Strong</b> - Good self-management potential; predicts an effort candidate; more proactive than responsive – takes initiative
30 to 40	<b>Good</b> – Self-manager; tendency to be balanced between responsive and proactive
20 to 30	<b>Low Average</b> - May be able to manage activity; proactive effort still a question
10 to 20	<b>Low</b> - More responsive than proactive; lower than average prospecting activity;
<10	<b>Caution</b> – May indicate low effort potential; may not be a natural self-manager; needs external structure. Responsive – likes giving and receiving feedback; predicts low prospecting activity

#### Coaching Suggestions for Above Average To High Self Management

Strong self managers have the most potential to make use of their strengths and skills to maximize their effectiveness. Individuals with this type of profile are often top performers who will initiate activity rather than waiting to respond to a process or someone else. They should be encouraged to create their own plans to achieve their personal and professional goals. They are generally self evaluating and may also be somewhat critical of their own performance. Once they have developed their own plans, they should be encouraged to share their progress informally. Coach effort rather than coaxing a self manager. Avoid being too directive.

#### Coaching Suggestions For Average Self Management Potential

Sales people in the average range react well to a balance of coaching and being left alone to work towards their goals. They will need a well managed environment but many (particularly those in the high average range) should be able to learn how to manage their time effectively.



Help them build commitment by asking them to develop and commit to their own short term goals. Regular developmental meetings could be used to review their achievements and provide them with ongoing coaching and renewed focus. They will react favorably to positive feedback when they have achieved their goals and met their commitments.

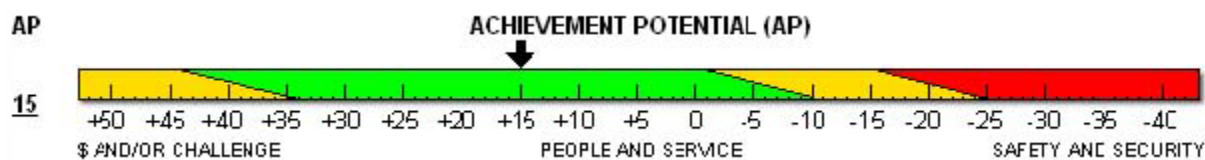
### Coaching Suggestions For Responsive/Process Oriented People

Individuals who are below average on this scale who will need consistent feedback and hands-on leadership or well-defined sales processes. They are best suited to familiar sales careers where their previous experience will be a good indicator of the direction their careers will take.

Provide a well structured sales plan with clear objectives and outline the specific activities that are needed to achieve these objectives. Avoid unstructured situations where there is a need for a lot of initiative. Use existing strengths as much as possible when coaching individuals in this range. Some pressure may be necessary to enhance performance but avoid constant pressure as it will be detrimental in the long term.

People who are process oriented often have difficulty adapting to change.

## ACHIEVEMENT POTENTIAL



The AP or Achievement Potential Scale is one of the most important POP scales. It measures the degree to which an individual is motivated by challenge as opposed to safety and security.

The AP scale evaluates the intensity and durability of the effort and commitment and reflects sense of urgency, bottom line focus, closing style and competitive nature. Our studies have shown that AP predicts survival and success in competitive sales. Sales people who must build a book of business need to be closers and tend to score higher on this scale than those who are provided with a book of business and are relationship sales people.

- Those who score in the green range on this scale (+40 to -5) tend to be most suited for a variety of competitive sales positions.
- Those who score on the leftmost end of the scale (+40 and higher) may be too focused on money and the bottom line. They can be extremely aggressive closers and not suitable for many sales roles.
- Those who score in the orange zone to the right (-5 to -20) tend to be softer closers and more suited for relationship selling. They can be successful in sales roles that allow them to build a clientele and track record over a longer period of time.
- Those who score in the red code zone (lower than -20) to the right are generally unwilling to close and would not typically be good candidates for sales roles.

The following are some closing style rules of thumb based on the AP score:

>25	<b>Very Strong</b> - Money maybe the only thing that matters; strongly task and goal oriented; relationships less important; extremely competitive; hard closer
10 to 25	<b>Strong</b> - Motivations are towards money and challenge primarily; persistent "closer"; task and goal oriented
-10 to 10	Good balance between money/challenge and people/safety; consultative closer with a combination of persuasion and persistence

- 20 to -10      Motivated by safety/security and the people side of the business; tendency to be service oriented; persuasive soft closer; fit to relationship sales
- < -20      **Caution** - Motivations are more towards safety and security vs. challenge and money; weak "closer" or "non-closer"

### Coaching Suggestions for Challenge Oriented People

People who are highly motivated by challenge need frequent new challenges to keep them interested. Allowing them to set goals for themselves can be very effective as they may set more challenging goals than those that management would set for them. If they are not achieving their goals on a regular basis, they may get frustrated. To help them achieve their goals, make certain that they are planning effectively and working independently.

Some people who are very focused on the 'bottom line' may need coaching on the people and service aspects of dealing with clients, customers, subordinates and their peer group. Coach them to retain their sense of urgency while helping them focus on ways that they can achieve their goals while maintaining good relationships with other people.

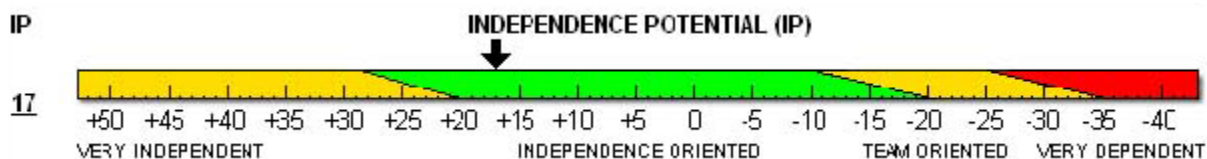
'Bottom line' people also need recognition. Acknowledge and reinforce their achievements when appropriate.

### Coaching Suggestions for those with Low AP

An individual with Low AP will need help setting regular, achievable goals. Coach him/her to focus on what needs to be accomplished on a daily basis and ask for commitment to daily goals. Coach him/her to monitor daily activity on a regular basis in order to maintain consistent performance.

Match him/her with mentors who will help with goal setting and reinforce any achievements by recognizing and praising them. Individuals with this motivational profile will be most effective in servicing and selling to an existing clientele.

## INDEPENDENCE POTENTIAL



The IP or Independence Potential Scale is a very important POP scale. It measures the degree to which an individual is independent as opposed to dependent. It is also important because our studies have shown that it is very predictive of retention and fit to the sales culture. It indicates the need for structure and affiliation in the work environment.

- Those who score at the high end (+25 and higher) tend to be very independent and scores above +40 are indicative of those who would tend to create their own processes, break the rules and not be team players.
- Those who score in the green range (+25 to -20) have been shown to be most suitable for a wide variety of competitive sales positions. The high end of the range (+10 to +25) tend to be very independent and comfortable creating their own structure. They are more suited to loosely structured environments. Scores in the range from -10 to +10 tend to be independent but comfortable adapting to structure. Those in the range from -10 to -25 are oriented more towards a team environment and are comfortable with structure. All of these styles can be successful in competitive sales but where the individual fits in the range reflects how he/she will interact with the corporate and managerial culture. It is an important consideration in both selection for retention and managing for performance.

- Those who score in the orange range to the right (-20 to -30) would be viewed as quite dependent and may need more structure than most sales managers are willing to provide. This is a caution to be explored prior to hiring.
- Those who score in the red range (below -30) would be viewed as very team oriented with the possibility of becoming dependent on the team and system. They are typically unsuitable for most competitive sales roles.

### **Coaching Suggestions For Very Independent People**

Highly independent people like to develop their own structure, so they will work best in a sales culture that provides a fair amount of freedom. They would work best with strong, flexible mentors whom they respect. When highly independent people are exercising good judgement, allow them more freedom.

Managers who deal with highly independent people must be very secure and able to cope with people who are more comfortable creating their own systems and structure rather than following established procedures. People with this profile can be stubborn, demanding and non-conforming. They can be very stressful to manage especially if the manager does not have a similar profile.

Provided that they have the appropriate skills, independent people with this profile can be valuable in developing new systems and procedures. They will not be comfortable with very structured sales cultures that are highly procedure oriented.

### **Coaching Suggestions For Independent Team Members**

Match independent team members with similar types where they can create synergies that work for both. Coach them to develop their performance levels as quickly as possible so that they can earn more relaxed direct supervision as performance reaches the appropriate levels.

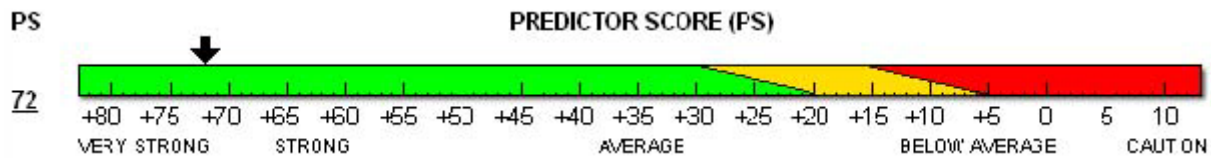
Encourage them to use their individual initiative by developing new sales strategies that work for them.

### **Coaching Suggestions for Dependent Team Members**

Match dependent people with mentors that have structured and well documented sales processes. They will be most comfortable in a team environment that makes use of their existing strengths.

Coach them to avoid developing dependency relationships by asking them for their suggestions on developing new clients and new markets.

## PREDICTOR SCORE



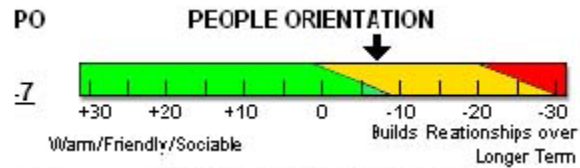
The Predictor Score is a composite score that is based on the key factors that have been shown to predict performance in competitive selling: self management (based on the EP scale); need to achieve/motivation (based on the AP scale) and independence (based on the IP scale). This is a blended score based on the EP, AP and IP scales. The Predictor Score is for managers who wish to have an instant read on the probability of success in competitive selling. The higher the score on this scale, the more suited the individual is to competitive selling based on the source traits (EP, AP and IP). As a general rule of thumb, scores at or above 40 are good with higher scores reflecting more competitive people. Scores below 40 are considered cautions and should be explored prior to hiring a candidate. Low scores (below 30) would be strong cautions and would indicate that the candidate would probably need a strong natural market to succeed.

### Caution

While the Predictor Score is the composite score that provides an overview, it is recommended that the hiring manager review all of the scores carefully. A high PS can be comprised of 2 of 3 source traits being high and the third one low. High PS without positive attitudes or strong people orientation may not be enough.

# COMMUNICATION STYLE

## PEOPLE ORIENTED



This scale assesses the approach style and the degree to which he/she will likely be motivated and rewarded by the "people" side of business. Those with high scores (+20 and higher) tend to enjoy and be energized by meeting new contacts and establish new friendships while those who are at the low end of the scale (-20 and lower) tend to build relationships over time and may be viewed as distant or aloof until people get to know them.

This score contributes to the communications style of the individual. Traditionally, sales people enjoy prospecting and meeting new people. Those who score low on this scale do not necessarily enjoy these things but they may be able to do so effectively.

Typically, sales forces consist of people who score in the range of +15 to +35. This is in part because people who enjoy meeting other people are often attracted to sales careers. Those who score higher and lower can do well in most sales careers but may need coaching in some aspects of selling. Very low PO scores are somewhat atypical in sales and should be explored prior to selection because the individual may find meeting people either stressful or unrewarding and may not be suited for prospecting and networking.

The following are general guidelines that describe individuals based on the PO score:

>25	Gregarious, fun-loving, outgoing; relationships are a turn-on; enjoys meeting new people
15 to 25	Friendly; builds relationships quickly; enjoys the interaction
-5 to 15	About Average – people are okay
-20 to -5	Candidate may not find satisfaction with the people side of the business
< -20	<b>Caution</b> - Candidate may have difficulty dealing with associates and the public; people skills may not be well developed

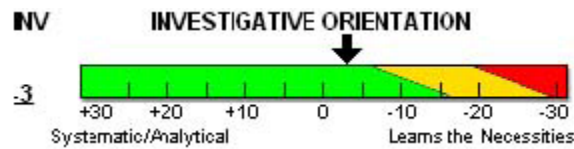
### Coaching Suggestions for Highly Sociable People

Coach people with high people orientation to understand that this strength will help them in dealing with other people and build good relationships. By demonstrating an appropriate interest in others, sociable people can make many contacts.

### Coaching Suggestions for People who Develop Relationships Slowly

Help them build effective communications skills through programs and mentoring that address such issues as effective listening, speaking, presenting and other related communications skills. Consult with them on specific communications skills that they need to develop.

## INVESTIGATIVE ORIENTATION



This scale assesses technical orientation and the degree to which he/she will likely be motivated and rewarded by the educational and personal development side of business. Those who score high on this scale (+20 or higher) tend to be very analytical and focused on learning things in detail while the low scores (-20 or lower) tend to learn only the absolute essentials. Most successful sales representatives tend to score in the range +10 to -10.

Many sales people in non-technical sales fall in the range from +10 to -10 which reflects sufficient interest in learning to be knowledgeable in the product without being overly analytical which can be a factor in communicating. High INV scores are often reflected by telling the client /prospect more than he/she may want or need to know about the product or service.

### Coaching Suggestions for Highly Analytical People

Help highly analytical people understand that their analytical nature is a strength which has great value in developing product knowledge and problem solving. Coach them to develop their ability to communicate their knowledge selectively and in a succinct way that others can grasp easily.

### Coaching Suggestions for People who Learn the Necessities Only

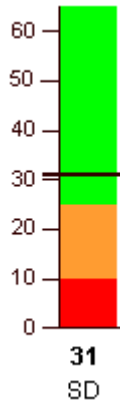
Assure that these individuals have enough product knowledge to sell effectively.

Focus on the technical strengths that they do have and define a strategy to develop the technical needs that are of critical importance to their growth.

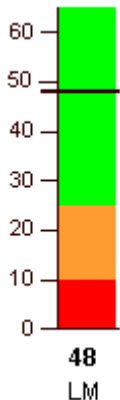
## Attitudes/Opinions

The POP™ 7.0 provides insight into key attitudes related to success in sales. These attitudes and opinions reflect recent experience and can change over time. Three vertical scales at the bottom of the page provide feedback on the candidate's confidence, approach to call reluctance and whether or not the test results should be considered reliable.

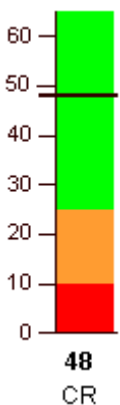
### SELF DIRECTED



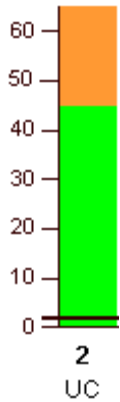
The **Self Directed (SD)** scale is the first of these and it provides excellent insight into the confidence of the candidate. It measures feelings of being in control of one's life and activities. High scores (40 and above) reflect healthy confidence which is reflected by taking responsibility for one's own actions and feeling able to accomplish most tasks that one sets out to do. Scores below 25 on the scale reflect low self confidence and feelings of being controlled by outside circumstances. Low confidence should be explored prior to hiring someone.



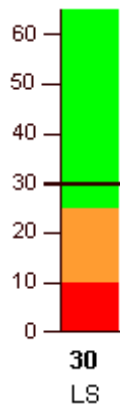
The **Lifestyle Management (LM)** scale, which was previously known as the **Stress Coping (SC)** scale, evaluates the candidate's habits and attitudes about integrating a demanding job with a busy lifestyle. The LM scale is not a personality trait but rather an attitude that reflects recent experiences. Scores in the range of 40 and higher show strong coping skills while those below 25 would be considered as cautions during the selection process. Individuals who are under a lot of stress can be helped by reducing their workload and providing stress coping skills through courses or a mentor.



The **Call Reluctance (CR)** scale measures the candidate's feelings about prospecting in his/her natural market, managing rejection and commitment to sales as a career. The CR scale is not a personality trait but rather an attitude that reflects recent experiences. The POP™ Version 6.0 has detailed Call Reluctance feedback, which is largely self explanatory.



The **Uncertainty Coefficient (UC)** scale provides an insight into whether or not the test results are reliable. High scores (above 45) indicate that the candidate may either misunderstand the profile or may be presenting him/herself in a socially desirable manner. The character traits measured by the POP tend to have low face validity meaning it is difficult to fake unless one is an expert in test construction. Some of the Attitudes have higher face validity and a high UC score can indicate the need to check the SD and CR scores carefully when following up with the candidate.

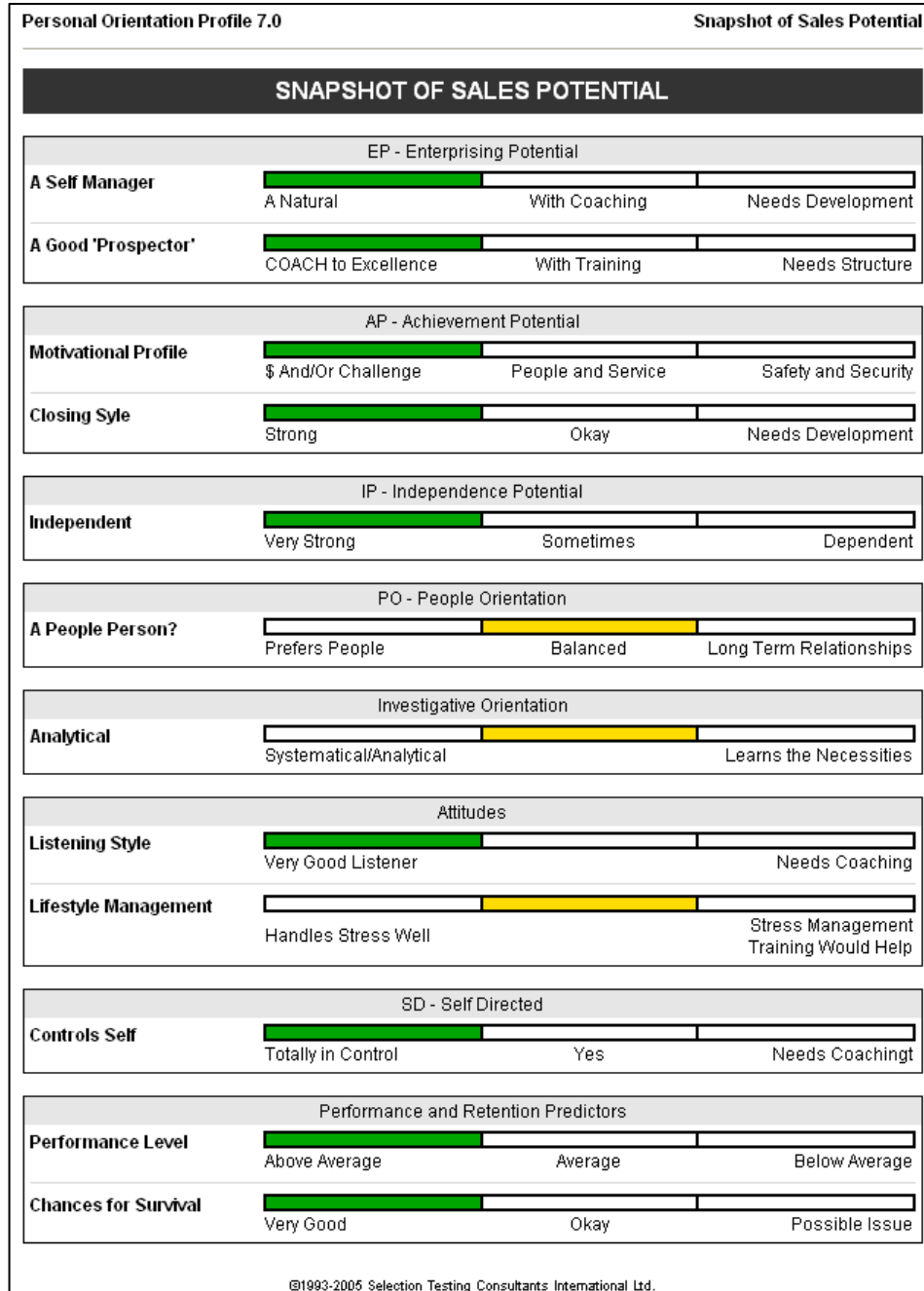


Listening Style (LS) is a scale which provides insights into the person's effectiveness listening in conversations. People with low score (below 25) may need coaching to be more patient and attentive when dealing with prospects, clients or other people.



# Management Report

## Snapshot of Sales Potential



This **Snapshot of Sales Potential** page provides a set of 3 segment graphs that are color coded so that green segments are a non-issue; yellow segments should be explored; and red segments should be explored with some detail.

Most of the graphs on this page are derived from the scales on the **Summary of Scores & Cautions** page which is discussed in detail in this User Guide.

These scales are projections of probable performance based on aggregate data for competitive sales people.



# Management Report

## Management Preview

Personal Orientation Profile 7.0	Management Preview
<b>MANAGEMENT PREVIEW</b>	
Performance Management	
<div> <div>Potentially demanding</div> <div>Accepting of modest performance</div> </div> <div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> </div>	
An indicator of this person's performance expectations as they relate to managing a sales force.	
Leadership Style	
<div> <div>Autocratic</div> <div>Democratic</div> <div>Team Member</div> </div> <div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> </div>	
A measurement of a person's natural leadership style and approach with others.	
Training & Development	
<div> <div>Excellent</div> <div>Good</div> <div>Caution</div> </div> <div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> </div>	
The natural inclination to train and develop new representatives.	
Recruiting/Attraction	
<div> <div>Excellent</div> <div>Good</div> <div>Caution</div> </div> <div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> </div>	
The potential to attract a high volume of recruits.	
<b>OVERALL PREVIEW</b>	
<div> <div>Excellent</div> <div>Good</div> <div>Functional</div> </div> <div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> </div>	
An overall assessment of this individual's potential as a sales manager.	

The **Management Preview** page provides an early overview of the candidate's potential to be an effective sales manager in the future.

**Performance Management** reflects the individual's natural approach to dealing with the performance of other people.

**Leadership Style** reflects the individual's most comfortable approach to leading a team of other people.

**Training & Development** reflects the individual's natural approach when training a developing new sales people.

**Recruiting/Attraction** provides a look at the individual's potential to recruit people into the sales career.

**Overall Preview** is based on the factors described above and provides a snapshot of the individual's potential to be an effective sales manager.

## Management Report

### Selection Considerations



#### SELECTION CONSIDERATIONS

##### Enterprising Potential (E.P.)

In competitive business environments, her strength on the E.P. Scale would indicate a strong potential for basic survival. She should have a very strong natural inclination towards being a self-manager. Given formal training in planning and time management skills, she should be able to make a routine of the daily effort required to maintain the basic contact activities essential for survival in demanding business opportunities.

##### Achievement Potential (A.P.)

This is an acceptable result on the A.P. Scale. This level of A.P. Scale results predicts the potential for eventual higher than average performance. She has a strong need for achievement and she will be anxious to finish any training requirements and get started at the job.

##### Independence Potential (I.P.)

This is a strong score on the I.P. Scale. In the job for which she is being considered, if you can eventually offer her an opportunity to work in a very independent way, assuming that she has earned the right to do so through demonstrated performance, then she may be able to express her independence productively. If your operation is such that tight supervision and control are and remain in place indefinitely, problems will occur. She would be essentially a 'maintenance free' employee from a supervisory standpoint once she has moved out of the initial training and supervision framework.

##### People Orientation (P.O.)

As this measure at this moderate level of strength deals mostly with the style of doing business, it has little impact on selection recommendations.

##### Investigative Orientation (Inv.)

This is an average to low average result on the Inv. Score. If she has successfully completed some program of training in the last few years, this will be an indication that she should be able to succeed at most basic training programs.

##### Managing Rejection

Her below average score on the managing rejection scale indicates that she could be quite sensitive to how clients are responding during the sales process. Explore her responses to the items to determine whether this sensitivity will be based primarily on the desire to be liked by everyone or a fear of being disliked by everyone. Understanding her feelings will assist management in both coaching and training strategies.

##### Call Reluctance

Sample will be comfortable prospecting within specific areas of her natural market. To prospect and network from a business perspective, she would require commitment to product and a practised method of approaching people. There may be some requirement for joint field work from time to time.

##### Commitment to a Sales Career

She would probably avoid talking about her career when she is involved in social or personal events. As a result she might miss a number of opportunities to advance her sales performance through informal and formal networking strategies. If the position involves a requirement for continuous prospecting and business development, her perspective of the sales career might create a problem. It is surprising that she is considering a career in sales.

The **Selection Considerations** page covers each of the key scales that should be considered as important factors in selecting a competitive sales person.

##### **Enterprising Potential (EP)**

reflects initiative and natural approach to self managing. An extremely important factor in sales success.

##### **Achievement Potential (AP)**

predicts natural risk taking and closing style. Also extremely important factor is sales success.

##### **Independence Potential (IP)**

reflects approach to external structure. Important in matching to manager and culture..

**People Orientation (PO)** reflects the individual's approach to meeting new people

**Investigative Orientation (Inv)** reflects the individual's approach to learning

**Managing Rejection** is an important attitude which reflects sensitivity to rejection which can become an attitudinal block to success in sales.

**Prospecting Orientation** can contribute to Call Reluctance which stops people from making calls to prospect.

**Commitment to Sales Career** is important because if the candidate does not view sales as a viable career option it will likely show up in his/her work.

## Management Report Interview Questions

The Management Report provides 7 pages of Interview Questions based on the candidates unique personality and how he or she responded to the POP Ver. 7.0 profile items. These questions are designed to help the interviewer identify strengths and growth opportunities .



### INTERVIEW QUESTIONS

---

#### Enterprising Potential (E.P.)

- Tell me about a time where you were required to use your self-management skills in completing a project or working towards meeting an objective.

Answer: \_\_\_\_\_

---

---

- Tell me about a time where you were thrown into a project or situation with very little guidance or direction. What did you do?

Answer: \_\_\_\_\_

---

---

- Tell me about a time when using your own initiative made the difference in achieving needed results. What actions did you take?

Answer: \_\_\_\_\_

---

---

- Tell me about a time where you converted a goal/task/directive into a plan of action. How did you manage your time and focus your effort each day to get the job done?

Answer: \_\_\_\_\_

---

---

**Additional Notes:**

# Management Report

## Responses from Opinions Section

This page provides the hiring managers with the opportunity to explore how the individual may have answered certain questions. This is used to validate the SD, LM, CR, LS and UC scores to make certain that the candidate has not been misinterpreted or has misunderstood something. Use of this page is recommended if the results do not match the interviewer's impression of the candidate or if there is a very high UC score (above 45).

Personal Orientation Profile 7.0		Responses from Opinions Section		
1=Don't Agree At All	2=Agree A Little	3=Somewhat Agree	4=Moderately Agree	5=Definitely Agree
1. Effort gets results (5)				
2. I thrive under pressure (3)				
3. I rarely interrupt others while they are speaking (4)				
4. It is easier to sell to friends than to strangers (1)				
5. I am often influenced by others (2)				
6. I would have difficulty integrating a demanding career into my lifestyle (3)				
7. I have never told lies (2)				
8. Aggressive sales people usually make a good income but have less repeat business (3)				
9. Most mistakes can be avoided (2)				
10. I am comfortable with changes in technology (4)				
11. I like to hear people fully explain their point of view (5)				
12. I avoid actions that might make people dislike me (3)				
13. People's good qualities are seldom recognized (3)				
14. I sometimes lack the energy to perform important tasks (2)				
15. Most conversations take too long (1)				
16. It is important that people approve of me (3)				
17. I am good at most things that I try to do (3)				
18. I stay focused on my priorities (4)				
19. After listening to an interesting anecdote, I like to describe a similar situation involving me (2)				
20. Sales people have a positive public image (3)				
21. Success is mostly luck (1)				
22. I often allow my attitude to affect my performance negatively (1)				
23. All my habits are good and desirable ones (2)				
24. It is very important to push people to buy a product or service after you have established that they need it (4)				
25. People get the respect that they deserve (5)				
26. I generally have a positive attitude towards work (4)				
27. I never envy others their good luck (4)				
28. Sales people make more money than they deserve (1)				
29. It is impossible to change company procedures (2)				
30. I find it difficult to manage my professional demands (1)				
31. I prefer to listen in conversations (3)				
32. I find it easy to make new acquaintances (3)				
33. Hard work brings success (5)				
34. I excel in a dynamic environment (5)				
35. I consciously pause before responding to others (3)				
36. My first sales should be to my family and friends (2)				
37. Plans never work out (1)				
38. I often avoid difficult tasks (1)				
39. I have never been late for work or for an appointment (3)				
40. In a group, I feel uncomfortable if a person does not like me (1)				
41. I create opportunities (5)				
42. I take care of myself with good daily habits (3)				
43. I try to do most of the talking when presenting materials to others (3)				
44. I have been successful in developing a large network of people (3)				
45. Compliments make me uncomfortable (1)				
46. I have difficulty coping with daily job challenges (1)				
47. I have never boasted or bragged (2)				
48. I adapt to what others expect of me (2)				
49. A good plan can avoid mistakes (3)				
50. Stress improves my performance (3)				
51. After listening to someone talk, I repeat the important points back to them to insure my understanding (3)				
52. I often refer people to my family and friends (2)				
53. Hard work does not always get results (1)				
54. To be effective on the job, I need more energy (2)				
55. I make sure others have finished speaking before I respond (4)				
56. Informal social events are a good source of sales contacts (3)				
57. I find it easy to talk about myself (2)				
58. Regular habits are an important part of my success (2)				
59. I have never said anything unkind about anyone else (2)				
60. I have met very few people whom I did not like (3)				
61. I am distracted easily (1)				
62. Professional demands often interfere with my lifestyle (4)				
63. People take too long to get to the point (3)				
64. I get upset when sales people call me at home (2)				
65. I am a confident person (4)				
66. I can concentrate on my work for long periods of time (4)				
67. I will interrupt other people to provide an answer to their question (1)				
68. To be successful at sales, I must change my image (2)				
69. My performance depends on the situation. (1)				
70. To be effective, I need to make several lifestyle changes (2)				
71. No one is ever rude to me (3)				
72. I would rather approach a potential new client by telephone than in person (2)				
73. I am successful in most aspects of my life (3)				
74. Work does not get me down (3)				
75. I enjoy listening to other people (4)				
76. Most people would prefer not to deal with salespeople any more than necessary (3)				
77. I am reluctant to make decisions (4)				
78. Lifestyle demands have interfered with my career success (1)				
79. I always admit my own mistakes (2)				
80. I would not like to be known as a sales person (4)				
81. I take time to reflect on my accomplishments (4)				
82. I enjoy pressure on the job (4)				
83. I give others my undivided attention when they are speaking to me (4)				
84. I have bought a product or service mainly because of the sales person (4)				
85. I let the organization define my training needs (3)				
86. People do not understand the pressures of my job (3)				
87. I prefer to ask very specific questions that require only a 'yes/no' answer (2)				
88. My family and friends are a good source of sales (3)				
89. Effort is entirely my responsibility (3)				
90. I manage stress effectively (3)				
91. I have a tendency to finish other people's sentences (1)				
92. Rejection is the most difficult aspect of sales (4)				
93. Others have interfered with my success (1)				
94. It is difficult to establish job priorities (1)				
95. I am not a good listener (1)				
96. I feel comfortable promoting myself and my company at social gatherings (2)				

## Management Report

### Training & Coaching Suggestions



#### TRAINING & COACHING SUGGESTIONS

##### **Based on the Enterprising Potential (E.P.) Results**

(Coaching Suggestions) Maximize existing strengths through training in basic personal time management and activity planning skills. Develop specific job related task planning and self management skills. Train her in these areas and monitor her planning and her activities until she demonstrates consistency. She can and will work best if you focus on the management of her EFFORT.

##### **Based on the Achievement Potential (A.P.) Results**

(Coaching Suggestions) Since she has the energy and ambition to succeed, she will profit from training in closing techniques so that she may apply that energy and ambition effectively. You will find that she will learn her best techniques for persistence in closing by being trained by someone who has a style of approach which fits well with her own personality.

##### **Based on the Independence Potential (I.P.) Results**

(Coaching Suggestions) She may resent the fact that you feel she must be trained. However, coaching certainly is necessary to ensure that she expends her energies in as productive a fashion as possible. The training should be aimed at getting her into the field as soon as possible.

##### **Based on the People Orientation (P.O.) Results**

(Training Suggestions) She may require help in building her skills in dealing with both clients and associates.

##### **Based on the Investigative Orientation (Inv.) Results**

(Training Suggestions) Don't just assume that if she has the books and materials that she will learn the content. Probably she should be monitored carefully through training to ensure that she does learn the necessary material.

The **Training and Coaching Considerations** page provides insight into the approach to training and coaching that would be most effective for this individual.

**Enterprising Potential (EP)** reflects initiative and natural approach to self managing. Those who are high on this scale will typically want less training and coaching while the opposite will be true for those low on the scale.

**Achievement Potential (AP)** reflects risk taking and sense of urgency which can affect how a manager coaches the person.

**Independence Potential (IP)** reflects approach to external structure and team work. Those who score high, do not like feedback and prefer to work independently while the reverse is generally true for those who score low on the IP scale.

**People Orientation (PO)** reflects the individual's approach to meeting new people

**Investigative Orientation (Inv)** reflects the individual's approach to learning. Those who score high on this scale are very analytical while those who are low tend to learn only what they think they need to know.

## Management Report Retention Prospects



### RETENTION PROSPECTS

#### **Based on the Enterprising Potential (E.P.) Results**

She may balk at working within an overly structured work situation as she needs continuing opportunities to customize the job structure to make it her own. She will likely need little managing in the long run from the standpoint of structuring and organizing the work.

#### **Based on the Achievement Potential (A.P.) Results**

She could become bored with a job that is repetitious even if the outcome of the job is a good income. To stay with you in the long run, she will have to be challenged by both the performance demands of the job and by a requirement to develop new and creative business or personal opportunities for herself.

#### **Based on the Independence Potential (I.P.) Results**

Over the long run, she will almost certainly leave any work situation which is or which becomes too structured or too team oriented. She will insist on the freedom to do things in her own way and at her own pace.

#### **Based on the People Orientation (P.O.) Results**

Probably the social environment of the job will have little or no bearing on whether she is retained over time or lost to you.

#### **Based on the Investigative Orientation (Inv.) Results**

It is likely that she would find it a disincentive having a constant pressure to learn new material and/or new methods.

The **Retention Prospects** page provides insight into the factors in the candidate's profile that could affect his/her retention.

#### **Enterprising Potential (EP)**

reflects initiative and natural approach to self managing. Low EP scores generally indicate poor retention prospects unless the manager is able to spend a lot of time with coaching and joint field work.

#### **Achievement Potential (AP)**

reflects closing style. Low scores on this scale are associated with people who are reluctant to close which causes retention issues.

#### **Independence Potential (IP)**

reflects approach to external structure and team work. High scores on this scale may be too independent for some cultures while low scores can reflect people who need too much structure or need to be part of a team. This scale is very prominent in

**People Orientation (PO)** reflects the individual's approach to meeting new people

#### **Investigative Orientation (Inv)**

reflects the individual's approach to learning. Those who score high on this scale are very analytical while those who are low tend to learn only what they think they need to know.

## Candidate Feedback Report

It is recommended that each candidate who completes the POP be given the candidate feedback portion of the report which comprises the last 3 pages (cover + 2 pages of text).

The candidate feedback provides the individual with useful information on personal strengths and career needs as well as advice on what to seek and avoid in future career paths.

**SELFMANAGEMENT**  
**GROUP**  
SELECT | DEVELOP | RETAIN | TOP PERFORMERS

**CANDIDATE FEEDBACK**  
**An Overview of Your Personal Characteristics & Career Strengths**

<b>CONTENTS</b>	<b>Page</b>
Personal Strengths/Career Needs	1
What to Seek/What to Avoid in Jobs	2

**#ABABABAB for Sample Sample on 2005/02/25**



## Personal Strengths/Career Needs (Pg 2 of Candidate Feedback Report)

The information on this page is provided to help the individual understand his/her personal strengths and how they would apply to different types of roles. This will help the individual gain an understanding of his/her personality in a way that he/she may not have considered and provides a starting point to applying those strengths and building upon them.

Personal Orientation Profile 7.0	Personal Strengths/Career Needs
<b><u>In Terms of Enterprising vs Support Role Possibilities</u></b> You would be described as extremely competitive, enterprising, assertive, aggressive, tough minded, determined and goal oriented. You may display new and creative ways to reach your personal and work objectives and you will be self-evaluative and sometimes critical of your own performance. Given an aim, objective or requirement, you would be able to develop your own plan, manage your time and focus your effort on a daily basis to reach your goals. Being a self-manager should come very naturally to you and these skills should be refined through formal training and/or on-the-job experience.	
<b><u>In Terms of Your Style &amp; Strength of Various Motivations</u></b> People would see you as being an achieving person, one who can be quite hard driving, eager, active and occasionally impatient. Challenge for you can involve doing some things simply because they are demanding, and many things because they have a concrete financial reward, but you will occasionally accept a challenge because it has a 'people-oriented' element to it. Financial rewards are important to you but sometimes you direct your energies towards things which have no payoff for you but which have this 'people-oriented' focus. You evaluate how well you are doing in life and in your career by what you earn, by how you feel about yourself and by the good you have done for others.	
<b><u>In Terms of Your Independence vs Your Need to Be in the 'Team'</u></b> You would be described as quite strong-minded, stubborn, demanding, firm, independent and resolute. You would be innovative in certain circumstances to achieve your objectives and tend to seek some additional responsibilities in your job and personal life. You would accept minimal supervision but it would be difficult for a supervisor to guide or closely supervise you over an extended period of time.	
<b><u>In Terms of Your Orientation Towards the 'People' Side of Business</u></b> You would be described as somewhat sociable, enthusiastic, cheerful, lively and entertaining. While valuing social interactions, you may be somewhat reserved in your initial contacts with new people. The achievement of goals would be through personal relationships developed over a very long period of time.	
<b><u>In Terms of Your Orientation Towards Technical &amp; Practical Concerns</u></b> You would be described as somewhat logical, reflective, analytical, factual and practical. Intellectual challenges, when offered just as challenges without any obvious practical utility, would not appeal to you as strongly as would other kinds of challenge and opportunity. Ideas and concepts which were of solid practical use would be of interest to you.	

## What To Seek/What To Avoid In Jobs (Pg 3 of Candidate Feedback Report)

The first half of this page provides information on the job attributes that the candidate should be seeking based on the character traits measured by the POP™ Version 6.0.

The second half of this page provides information on the job attributes that the candidate should be avoiding based on the character traits measured by the POP™ Version 6.0.

If the candidate is one that is well suited for the sales job for which he/she is being profiled, this can be part of the 'turn-on'. Conversely, poorly suited candidates can be let down easily by walking through the report and pointing out how the sales career would not be a good fit.

Personal Orientation Profile 7.0	What To Seek/What To Avoid In Jobs
<b><u>What Should You Look for In a Job/Career that Matches You Best?</u></b>	
+ Look for opportunities to create your own work structure and to develop your self-management skills by training in time management and activity planning. The opportunity to put solid effort into the job each day is a real plus for you as you know that effort invested consistently will produce the results you seek in both productivity and recognition.	
+ Look for a career path in which there is challenge that you evaluate has importance as a way of earning a good income, as a way of proving yourself and which has some real 'people-oriented' values in it.	
+ Make sure that any new position which requires you to accept close supervision and control initially will have those controls removed when you demonstrate through performance that you no longer need the help.	
+ You should look for employment that calls for an average amount of people contact and a limited number of contacts with new people. However, some of your job satisfaction would be found in the interaction with people at work.	
+ Look for employment that has a limited amount of analytical, technical and discovery learning to it. There are other challenges and rewards in the work environment which are more appealing to you. When you discover these, target them as ideal job requirements/opportunities.	
<b><u>What Should You Avoid in Jobs/Careers that Don't Match You?</u></b>	
- Avoid tightly and rigidly structured work situations. If there is no room to put your personal touch to work in organizing and managing yourself, the job may become too constricting for you. Try to avoid jobs that may limit your self-management skills development which is a very strong need in you for your personal productivity and your sense of satisfaction with any job.	
- Avoid positions which are essentially non-challenging and repetitive or which you evaluate as being without real social merit. Even some apparently strongly challenging kinds of jobs may not satisfy you if they lack real human values in their purpose.	
- Avoid career paths which have vague supervisory requirements or which expect you to accept continuing and close supervision for a prolonged period of time. You would eventually rebel at too much and too close supervision.	
- You should avoid a position where you are expected to perform an exclusively public relations role.	
- Avoid jobs that are particularly detail oriented. Jobs that require you to quickly learn and apply new technologies or vast amounts of new information won't be particularly satisfying.	

# Personal Coaching Guide (Build Success Habits and Build Your Business)

This personal coaching guide is designed to give to the sales person whether he or she is a new hire or a seasoned veteran. The advice in this guide was developed from very experienced sales managers and is customized to the personality profile and attitudes of the sales person.

This report provides the sales person with in depth self knowledge that will help him or her identify strengths and growth opportunities.

## SELFMANAGEMENT GROUP SELECT | DEVELOP | RETAIN | TOP PERFORMERS

### Build Success Habits and Build your Business!

SMG  
#ABABABAB  
2007/01/28  
Sample Person

CONTENTS	Page
Introduction	2
Commitment and Growth	3
Building Success Habits	4
Motivational Profile	5
Independence	6
People Orientation	7
Investigative Orientation	8
Self Confidence	9
Lifestyle Management	10
Dealing with Call Reluctance	11
Listening Style	12

This report is designed to help provide you with self knowledge and insight into your personal strengths. With this knowledge, you will be able to use your strengths as a basis to take control of your own career and build the necessary habits that will become second nature and help you attain success.

Use this report to learn about yourself and how you can benefit from any future training and coaching.

*John C. Marshall, Ph.D.*

## Commitment and Growth

This page of the report gives the sales person feedback on his/her fit to a sales career and what type of sales career. We view sales careers on a continuum from very competitive sales at one end to selling from a service contact on the other. This page shows the individual's best fit to sales career type and some strategies to take advantage of that fit.

### Commitment and Growth

#### Fit to Sales Career

You are very well suited to competitive sales and have the attributes to make you successful in this field.

#### Self Coaching Strategies

- Use this report to identify your strengths and how to use them.
- Make a personal commitment to your sales career in order to take full advantage of your potential.
- Set high standards for yourself in terms of activity and results. You can control the activity and the results will follow if you keep working and improving your skill set.
- Outwork the competition

#### Work Well with your Manager/Mentor

- Meet regularly with Manager/Mentor and use those meetings to learn what you are doing well and how to leverage your strengths

### Competitive Sales

We define competitive sales as sales where all or almost all of the person's income is derived from commissions. In other words, if they do not sell, they do not survive. Some may call them 'hunters' or other similar terms but the competitive sales person is one who must sell to live. Typically, competitive sales people have certain characteristics that make them successful. They would be described most often as self managing; competitive; motivated by money; independent. Many competitive sales roles have short sales cycles.

### Relationship Sales

Relationship sales people can be in the same market place as competitive sales people and be compensated in the same way but most relationship sales roles have a base salary plus a more modest commission structure or a bonus plan. Relationship sales people are usually more suited for working with existing clients and building on longer term relationships. Many relationship sales roles have longer term sales cycles. Relationship sales people tend to be focused on the longer term and may be softer closers. They may be more comfortable with organizational structure and like to make it work to their advantage.

### Service Sales

We define service sales as a type of sales that relies more on selling to an existing client, often from a service call or in a retail environment. People who fit this type of selling best are more comfortable responding to a customer's need and providing the proper product or service. Typically, these sales people are less likely to prospect or be aggressive business developers.

## Building Success Habits

This page is based on the EP score and is devoted to helping the individual take control of his/her sales career by building good habits that become second nature. By developing good habits like those suggested in this personalized self-coaching report, the individual salesperson begins to do the things that are bound to make him or her successful.

This page and each that follow will have some or all of these sub-headings with suggestions customized to the individual:

**Build Good Habits** and do the things that build consistent work ethic. By working hard people will learn how to work smart and once they are doing both, they are very likely to be top performers.

**Product Knowledge/Certification** requires study habits and knowledge upgrades that people need to know to become licensed or to be well informed in the industry.

**Building Your Business** is an extension of good work ethic. By doing the things recommended here, the chances of building a client base and/or book of business are enhanced.

**Working with your Manager/Mentor** will be easier if the sales rep does some or all of the things recommended.

## Other Individual Pages

### Motivational Profile

This page is based on the AP score of the individual. It provides personalized information on how he or she can use personal motivational needs to his/her advantage.

### Independence

This page is based on the IP score of the individual. It provides personalized information on how he or she can take advantage of his/her approach to structure to be more successful.

### People Orientation

This page is based on the PO scale and provides self coaching suggestions based on how the sales person feels about meeting and interacting with new people.

### Investigative Orientation

This page is based on the Inv scale and provides suggestions on how the sales person may take advantage of his/her approach to learning and information gathering.

### Self Confidence

This page helps the sales representative build on strengths to boost and/or maintain personal confidence levels.

### Lifestyle Management

Provides feedback on how the sales person is handling stress and possible ways to manage more effectively.

### Dealing with Call Reluctance

Gives some tips on how the sales person can deal with rejection, commitment and the other issues that can

contribute to Call Reluctance which can be a major attitudinal block to performance.


## **Listening Style**

This page provides feedback on how well the sales representative listens in conversation. This feedback itself can be enough to help people realize that they are not good listeners if that is the case. It also provides some basic suggestions on how to get better if that is an issue.

## Manager's Coaching Guide

This coaching guide is for the manager and is customized for the individual sales person. The coaching advice in this guide was developed from very experienced sales managers and is customized to the personality profile and attitudes of the sales person.

This report is also aligned with the Personal Coaching Report so that strategies in each report will complement each other when dealing with a specific sales representative.

  
SELECT | DEVELOP | RETAIN | TOP PERFORMERS

### A Guide to Helping Sample Person Build Success Habits and Build his Business!

ID#: ABABABAB  
2007/01/28  
SMG

CONTENTS	Page
Introduction	2
Commitment and Growth	3
Building Success Habits	4
Motivational Profile	5
Independence	6
People Orientation	7
Investigative Orientation	8
Self Confidence	9
Lifestyle Management	10
Dealing with Call Reluctance	11
Listening Style	12

This report is designed to help provide you with self knowledge and insight into your personal strengths. With this knowledge, you will be able to use your strengths as a basis to take control of your own career and build the necessary habits that will become second nature and help you attain success.

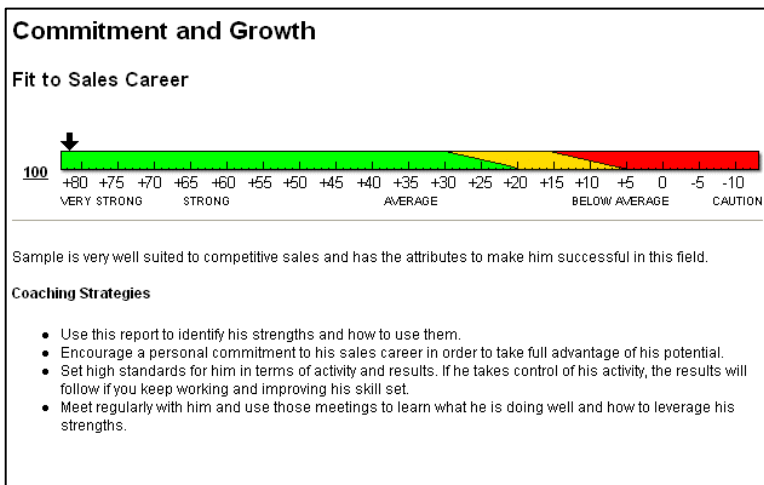
Use this report to learn about yourself and how you can benefit from any future training and coaching.

*John C. Marshall, Ph.D.*

Page 2 of the Manager's Coaching Guide is an introduction to its purpose and use. The remaining pages show how the sales representative scored on the POP and provide what we believe to be suitable approaches to coaching the sales representative based on his/her personal scores.

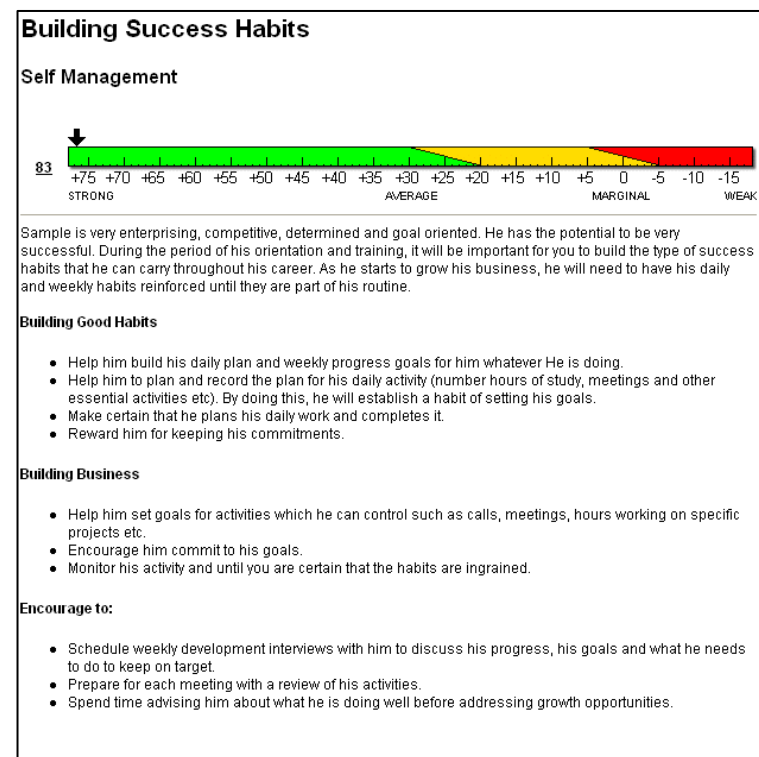
## Commitment and Growth

This page of the report gives manager or coach feedback on the sales rep's best fit to a sales career. We view sales careers on a continuum from very competitive sales at one end to selling from a service contact on the other. This page shows the individual's best fit to sales career type and some strategies on how to coach the rep to take advantage of that fit.



**Commitment and Growth** is based on the Predictor Score (PS). Those in the green area are generally well suited to competitive sales from a personality point of view. Those in the yellow and red areas are more likely to require more time and energy investments by the coach or manager to achieve success.

## Building Success Habits



**Building Success Habits** is based on the Enterprising Potential (EP) score and is devoted to helping the individual take control of his/her sales career by building good habits that become second nature.

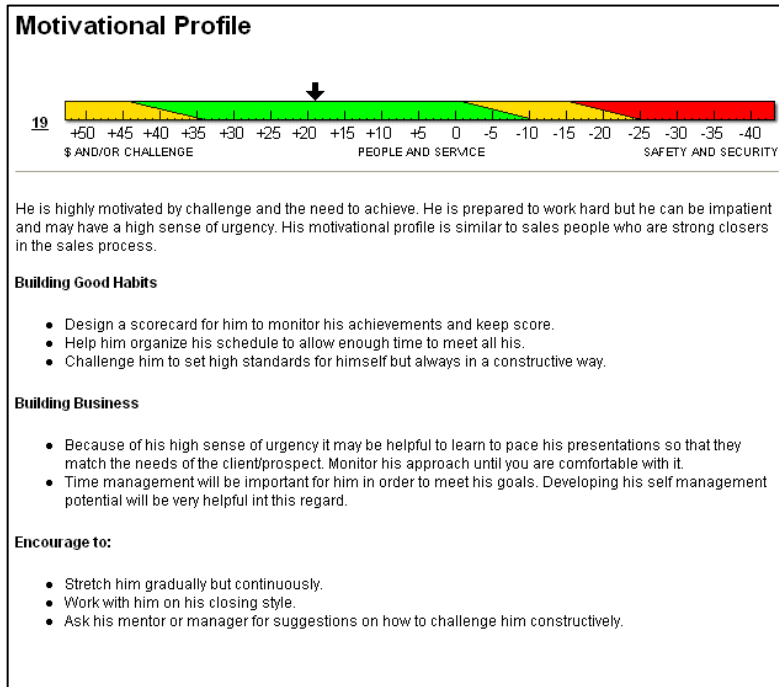
The coach can help the sales representative to develop good habits like those suggested in the personalized self-coaching report by reinforcing effort as well as results.

People on the left side of the scale are more likely to use their own initiative while those to the right are more comfortable responding.

The yellow and red zones are cautions for competitive sales as they are less likely to prospect and will need more coaching.

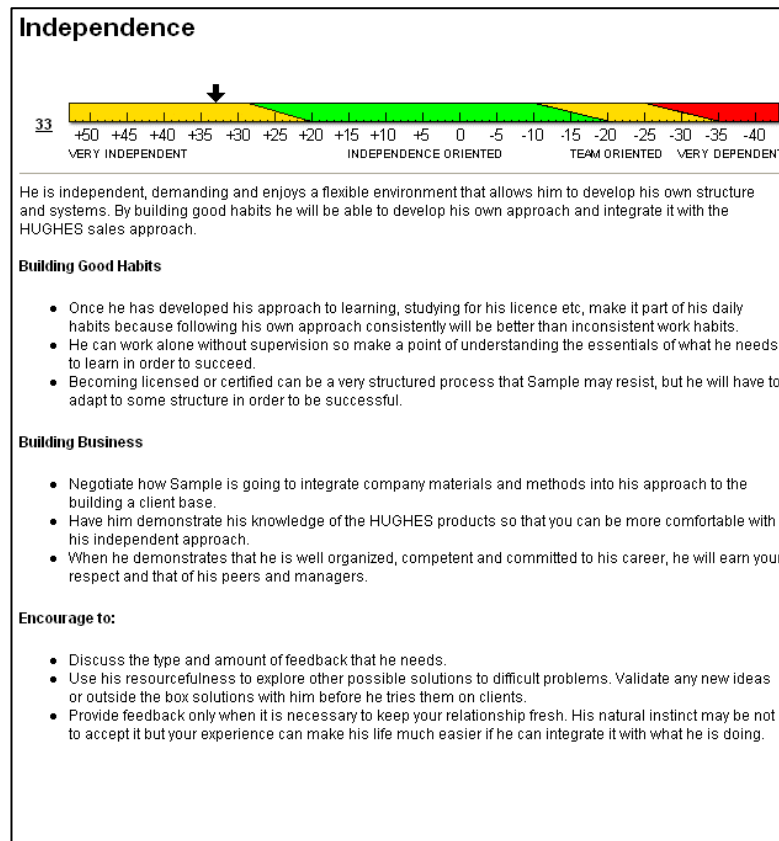


## Motivational Profile



**Motivational Profile** is based on the Achievement Potential (AP) scale. Those in the green area are generally well suited to competitive sales because they would have a natural inclination to close during the sales process. Those in the yellow and areas may be inclined to close too soon (leftmost end of scale) or be reluctant to close (right side of green area). Those scoring in the red area would likely be unsuitable as closers because they are risk avoidant and have little sense of urgency.

## Independence

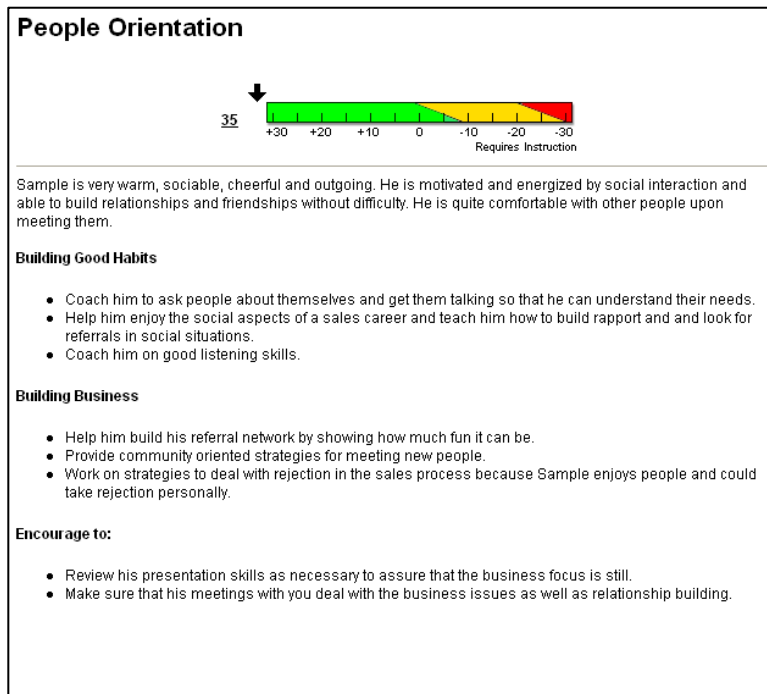


**Independence** is based on the Independence Potential (IP) score. Those in the green area are considered independent enough to function effectively.

The left yellow zone reflects people who may be too independent for most cultures and some managers.

The cautions on the right side of the green zone reflect team orientation and possible dependency which require the manager to provide a lot of external structure and may even require selling as part of a team.

## People Orientation



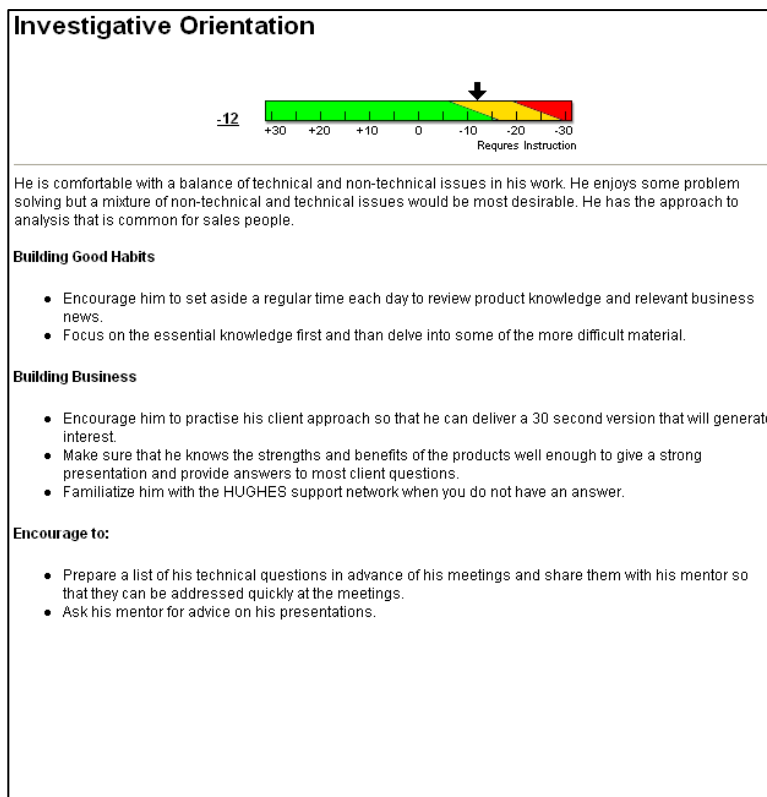
**The People Orientation (PO)** scale provides an insight into how much the sales representative enjoys meeting new people.

Most sales people are in the green area but this factor does not predict success.

Those in the yellow or red zones can be successful if they have good social skills.

Those sales people with low People Orientation often find it less rewarding to meet new people or give presentations so they may need to learn behaviors and make them habits in order to be more comfortable in social situations.

## Investigative Orientation



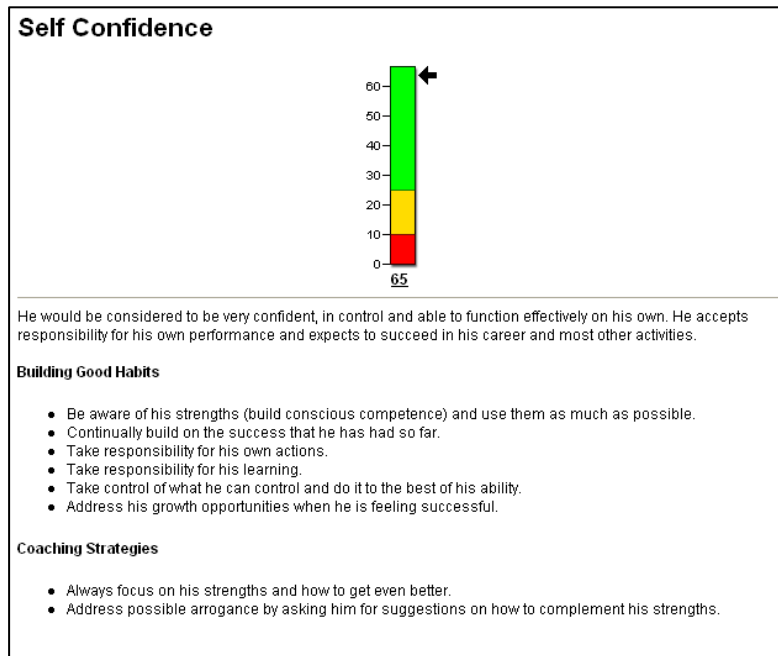
**The Investigative Orientation (Inv)** scale provides an insight into how much the sales representative enjoys learning.

For sales people are in the green area we can assume that they are curious and analytical enough to learn about the products and services that they are selling.

Sales people in the yellow range can be suitable for non-complex or non-technical sales but those in the red range could be problematic if they have to learn new things to be effective.

Our experience shows us that sales people in the green range usually do well in licensing and product knowledge but this scale has little predictive value in sales success.

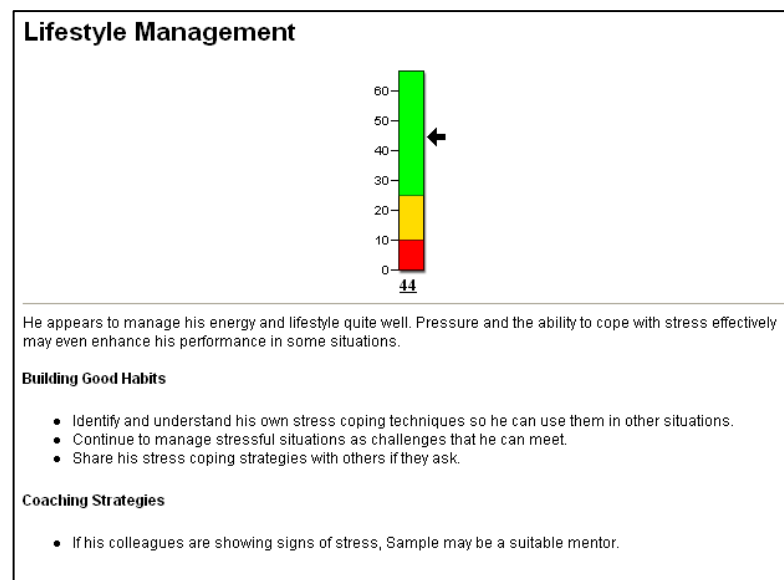
## Self Confidence



**Self Confidence** is based on the Self Directed (SD) scale. Those in the green area are suitable for competitive sales because they are generally confident although scores above 40 are preferable because confidence can be transitory in sales.

When sales reps have low scores, it is important to focus them on the things that they do well so that they can achieve small victories and feelings of conscious competence to get back on track.

## Lifestyle Management



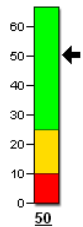
**The Lifestyle Management (LM)** scale provides an insight into how well the sales representative is managing the stresses of his/her lifestyle.

Sales people in the yellow range likely need some help in managing their lifestyle. As a coach, the ideal approach is to try to get them to reduce their work load.

Low scores (red zone) may require intervention from stress counselor or other lifestyle management specialists..

## Dealing with Call Reluctance

### Dealing with Call Reluctance



Sample has the sort of attitude about prospecting, managing rejection and sales as a career that would be considered as suitable in almost any sales career. Generally speaking, he does not take rejection personally and should be very comfortable building his business.

**Building Good Habits**

- Take advantage of his comfort with prospecting and rejection by making a regular habit.
- Commit to a number of contacts or calls that he is going to make each day and start making them. This is a success habit that is hard to beat in sales.
- Focus on the high quality of the products and services that HUGHES provides so that he feels comfortable with the value that he is providing to his prospects and clients.

**Building Business**

- Keep asking for a referral even if you don't expect one.
- Remember that a positive attitude is essential and building a successful market survey will help you prospect when building his business in the future.
- No one likes rejection but he is generally good at accepting it as non-personal. When people won't talk to you or help with his market survey it is more likely that they are worried about how their friends would react than rejecting you. Try to set them at ease by demonstrating his good judgment and tact.

**Encourage to:**

- Praise his strength in this area.
- Encourage him to be a mentor to others if it is appropriate.
- Brainstorm on finding additional strategies on how to prospect and deal with rejection.

**This is** based on the Call Reluctance (CR) scale. Those in the green area are generally suitable for competitive sales because they understand that rejection is not usually personal, they like sales as a career and are not afraid to network in their natural market.

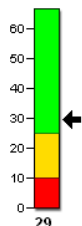
Scores above 40 are preferable because lower scores are more vulnerable.

Scores below 25 indicate a serious attitudinal block to performance.

NB. High CR scores do not predict performance but low CR scores can erode the behaviors that successful sales people need.

## Listening Style

### Listening Style



Sample's responses indicate that his approach to listening is typical of the majority of people. He is likely to listen to others attentively most of the time and may have some development opportunities in his listening style.

**A Guide to Helping**

- Think about his approach to listening and becoming more attentive and effective when gathering information.
- Consider formal training in listening skills, particularly in handling client/client relations.

**Coaching Strategies**

- Provide occasional feedback on his approach to listening.
- Role-play potential interactions that he will encounter with clients, peers or others.

**The Listening Style (LS)** scale provides an insight into how effective the sales representative is as a listener.

This could be a sensitive area that the coach may wish to address carefully.

## APPENDIX

### Guidelines for Exploring a High Uncertainty Coefficient (UC) Score

When economic conditions are poor and there is increasing competition of valued positions, the potential exists for higher UC scores on the POP such that candidates feel the need to present themselves in the best possible light.

This brief outline will highlight the items associated with the UC score, the major reasons for a high UC score and a set of guidelines for exploring the UC score with a specific candidate. It is recommended that if a recruiter or manager has specific questions, they are encouraged to set up a telephone consultation with their Home Office consultant and a POP consultant from the Self Management Group.

#### THE UC ITEMS

- 07. I have never told lies.
- 23. All my habits are good and desirable ones.
- 27. I never envy others their good luck.
- 39. I have never been late for work or for an appointment.
- 47. I have never boasted or bragged.
- 59. I have never said anything unkind about anyone else.
- 71. No one is ever rude to me.
- 79. I always admit my own mistakes.

As evident from the items, they include statements that typically require an absolute or yes/no response. They are very extreme types of questions. For example, "I have never told a lie" can realistically only be answered 1 or 5. Most people mark 1 or 2 for the item.

A high UC score becomes a caution when it is greater than 45. To create a score of 45 or greater, a candidate would have to answer the majority of the items as either 4 or 5. Therefore, it is quite unlikely that a candidate reading the questions and answering them honestly will have a high UC score. However, it can and does happen. The following section outlines the major reasons for a high UC score.

#### MAJOR REASONS FOR A HIGH UC SCORE

**SOCIAL DESIRABILITY:** This is by far the most common reason for a high UC score. The candidate, in an effort to impress the recruiter, attempts to present an inflated positive self-image. As a result, they mark the UC items higher. When exploring a high UC score for this reason, it is important to determine whether or not the candidate inflated just the UC items or all the items. This is usually very easy to determine by asking interview questions to justify the other elements of the POP report. The sample questions in the POP written report are excellent for this purpose.

- 1) **LANGUAGE DIFFICULTIES:** If the candidate is struggling with the language, they do NOT understand the subtleties of the words 'never' or 'always' and as a result trigger the high UC score.
- 2) **RANDOM RESPONDING:** On rare occasions, a candidate will not be reading the questions and will simply respond in a random manner. For example, mark all 5's or alternate between 1 and 5. This type of responding will generally be reflected in the UC score.
- 3) **SPECIFIC RELIGIOUS GROUPS:** This is the least common reason for a high UC score. Our research has found that some very religious groups tend to trigger a high UC score. For example, they are being honest when they circle 5 (definitely agree) on the item "I have never told a lie". Again, this is very easy to determine in a subsequent discussion of the POP report.

## POSSIBLE STEPS FOR EXPLORING A HIGH UC SCORE

To explore the reasons for a high UC score and determine whether or not the POP report is reliable, the following steps are recommended.

**STEP #1:** Investigate the UC items with the candidate. Go to the items on page 3 and ask the candidate to explain their responses to the UC items that they marked 4 or 5. An honest candidate will explain their response quite comfortably. For example, I don't usually tell lies so I marked a 4. A candidate who was distorting or inflating their self image, will become quite defensive or be unable to explain their response. A lack of explanation will also be evident with language difficulties or random responding.

**STEP #2:** Look at the Self Directed (SD) and Call Reluctance (CR) scores. If any of these scores are greater than 60, it indicates that the candidate was also potentially inflating all the scores on page 3.

**STEP #3:** Investigate the power scores (Enterprising, Achievement and Independent) and the neutralizing scores (Acquiescent, Relaxed and Team Oriented) on the POP. If any of the power scores are greater than 140 or neutralizing scores less than 40, they are very unusual scores and indicate that the profile might be inflated.

**STEP #4:** Candidate Feedback. Give the candidate the 2 pages of feedback from the POP report and ask if the pages describe him or her accurately. If the answer is YES, ask for examples from the person's background that would justify the profile. If the answer is NO, ask for examples from the person's background that would justify their challenges to the information.

**STEP #5:** Interviewing Questions. The interview questions included in the POP report are designed to help the recruiter validate the profile from the experiences of the candidate. The POP is assessing potential and the answers to the interview questions should substantiate or challenge the POP predictions.

## SUMMARY

In summary, the most effective strategy for minimizing high UC scores is to be proactive by selecting the appropriate language for each candidate and following the simple administration instructions. This will eliminate all the major reasons for high UC scores.

A high UC score does NOT automatically indicate that the POP results are invalid but rather indicates that a recruiter or manager should be cautious about accepting the results as reliable. Reliability indicates consistency, validity is a measure of the accuracy of the results. Validity requires reliability. Therefore, by following the recommended steps to explore a high UC score, the user will be able to determine whether or not the POP results are reliable and valid.