

# Interactive Insights™

Sales Version

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

**John Doe**

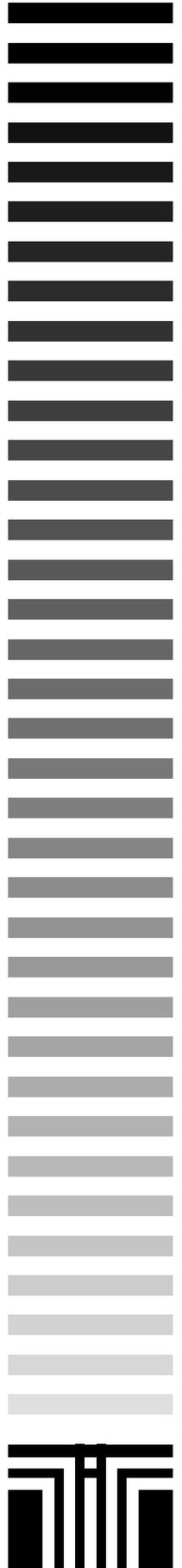
Sales Representative

ABC Company

1-14-2003

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# INTRODUCTION

This Interactive Insights™ Sales Version report is the result of the online assessment you have completed. It contains specific and comprehensive information on your behavioral style. Use this report as a reference point in conjunction with your Blueprint For Success™ that contains your personalized responses to the online self-development questions.

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

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

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

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

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

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

# SALES CHARACTERISTICS

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

John becomes highly excited about selling something that he really likes. He consistently meets the challenge of persuading people to his point of view. Some buyers may desire less talk and more facts. He prefers to sell new, innovative products or services. In fact, he often uses creative ways to sell his products or services. He prefers to sell a new client on himself first rather than his product or service. This reflects his natural approach. When he buys, he also prefers to be sold in this manner. Detail work is not John's forte. He enjoys "people over things" and may procrastinate when faced with time-consuming, detail work. He prefers to be evaluated on his results, not the paper work. He maintains a high trust level; that is, he trusts that people will make good on their promises. Socially and verbally aggressive, he loves to meet strangers and begin conversations. This is a great attribute when new territory is opened, or new accounts are dictated by business conditions.

John welcomes the objections that prospects raise. This provides an opportunity to meet a challenge and share more of his knowledge. He may not answer objections completely. He often treats them lightly and may "tap dance" around the objections or use sales puffery to answer them. He succeeds in projecting self-confidence in his sales presentations. This self-confidence evolves from his belief in himself and his products or services. This may cause him to become frustrated if a prospect attacks either him or his product. He should learn to follow all objections with a question. This will allow him time to prepare his answer and help clarify the prospect's actual objection. John frequently uses emotion and active body language in his sales presentation. With

# SALES CHARACTERISTICS

some buyers this could be detrimental because they may see him as being superficial. He may be rather careless in his sales preparation. He truly believes he can walk and talk his way through any presentation at anytime, anyplace.

John may be positive and direct with his closes. He will be friendly and persistent as he attempts to close the sale. John's listening skills may cause him to miss some closing opportunities. He may be thinking about what he is going to say next and miss the buying signal. Sometimes he tries too hard to accommodate the buyer with service. He will resent his effort if the account doesn't live up to its potential. He may promise more than he can deliver to close a sale. He does intend to deliver what he says, but he has difficulty finding the time to provide what he promises. His optimism makes him believe he can deliver. John can be guilty of overservicing the accounts he feels are personal friends. To him, friendship is important and he may overlook certain requests to maintain the friendship. He would rather make a social visit instead of a service visit. The social visit meets his need to be friendly and outgoing, while the service visit requires special effort if customers don't buy more products or services.

# UNIQUE TALENTS

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

- Negotiates conflicts.
- Bottom line-oriented.
- Self-reliant.
- Can support or oppose strongly.
- Verbalizes his feelings.
- Accomplishes goals through people.
- Team player.
- Creative problem-solving.

## IDEAL ENVIRONMENT

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

- Democratic supervisor with whom he can associate.
- Forum for his ideas to be heard.
- Work with a results-oriented team.
- Freedom from control and detail.
- Assignments with a high degree of people contacts.
- Needs difficult assignments.

# CHECKLIST FOR COMMUNICATING

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

Do:

- Provide ideas for implementing action.
- Provide solutions--not opinions.
- Use the carrot approach when appropriate.
- Define the problem in writing.
- Appeal to how he will benefit or be admired.
- Provide testimonials from people he sees as important.
- Look for his oversights.
- Clarify any parameters in writing.
- Flatter his ego.
- Understand his defiant nature.
- Ask for his opinions/ideas regarding people.
- Read the body language for approval or disapproval.
- Talk about him, his goals and opinions he finds stimulating.

# DON'TS ON COMMUNICATING

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

Don't:

- Kid around too much, or "stick to the agenda" too much.
- Drive on to facts, figures, alternatives or abstractions.
- Leave decisions hanging in the air.
- Talk down to him.
- Let him overpower you with verbiage.
- Give him your opinion unless asked.
- Be paternalistic.
- Be dogmatic.
- Ramble.
- Be curt, cold or tight-lipped.
- Legislate or muffle--don't overcontrol the conversation.
- "Dream" with him or you'll lose time.

# SELLING TIPS

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

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

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

Factors that will create tension:

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

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

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

Factors that will create tension:

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

# SELLING TIPS

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

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

Factors that will create tension:

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

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

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

Factors that will create tension:

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

# PERCEPTIONS

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

"See Yourself As Others See You"

## SELF-PERCEPTION

John usually sees himself as being:

Enthusiastic  
Charming  
Persuasive

Outgoing  
Inspiring  
Optimistic

## OTHERS' PERCEPTION

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

Self-Promoting  
Overly Optimistic

Glib  
Unrealistic

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

Overly Confident  
Poor Listener

Talkative  
Self-Promoter

# TIME WASTERS

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

## 1. INABILITY TO SAY NO.

The inability to say no is when you are unable to or feel powerless to refuse any request.

### POSSIBLE CAUSES:

- Have many interests and want to be involved
- Confuse priorities
- Fail to set priorities
- Do not want to hurt others' feelings
- Do not want to refuse a superior's request
- Do not feel comfortable giving "real" reason and doesn't want to lie

### POSSIBLE SOLUTIONS:

- Realistically evaluate how much time is available
- Understand limitations and what can be done well
- Set daily and long-term priorities
- Learn to say no to those people and tasks that do not support daily and long-term priorities

## 2. DESIRE TO BE INVOLVED WITH TOO MANY PEOPLE

The desire to be involved with too many people is involvement that extends beyond business interactions to the point of interfering with work. Beyond being friendly, it is excessive socializing.

### POSSIBLE CAUSES:

- Have many interests
- Want to be seen as one of the gang
- Need praise and approval from others

### POSSIBLE SOLUTIONS:

- Recognize your time constraints
- Be selective in getting involved in activities
- Monitor energy level
- Keep personal and job related priorities in view

# TIME WASTERS

## 3. POOR FILING SYSTEM

A poor filing system is one that has no predetermined method for subject matter grouping. It is one that you may understand but is not usable by others who may need to retrieve information from your files.

### POSSIBLE CAUSES:

- Have not determined or prioritized subject matter groupings
- Categorize by emotions

### POSSIBLE SOLUTIONS:

- Set up a cataloging system that you AND others can use easily
- Have someone assist you in setting up a system
- Use cross-referencing indexes
- Computerize information

## 4. PROCRASTINATION

Procrastination is the process of delaying action. It is also the inability to begin action.

### POSSIBLE CAUSES:

- Priorities have not been set
- Do not see projects or tasks clearly
- Overwhelmed with commitments
- Hope that time will solve or eliminate the problem
- Fear of failure

### POSSIBLE SOLUTIONS:

- Set goals and establish priorities
- Break large projects into small steps and do one at a time
- Agree to follow established priorities
- Consider consequences if it doesn't get done
- Remind yourself that you will avoid the stress of putting something off until the last minute

# TIME WASTERS

## 5. OPEN DOOR POLICY

An open door policy in this context refers to giving unlimited and unmonitored access to anyone who wishes to see you.

### POSSIBLE CAUSES:

- Want to be seen as supportive and available
- Want the social interaction of people dropping by
- Have a difficult time saying "no"
- Use people interruptions as a way of procrastinating or justifying missed deadlines

### POSSIBLE SOLUTIONS:

- Set aside time to "close your door" and work on projects
- Set aside time to interact with co-workers
- Learn to prioritize activities and say "no" to low priorities
- Place your desk so that it is not always in "view" of those who pass by
- Avoid eye contact with people who walk by your desk or office

## 6. LONG LUNCHES

Long lunches are those that extend beyond the normal time for eating. They could be kept within a specific time frame but are not.

### POSSIBLE CAUSES:

- Get involved in the excitement of conversation and forget about time
- See long lunches as a networking opportunity
- Like doing business in a social, non-threatening environment
- Use long lunches as a way to avoid unpleasant tasks, people or the work environment

### POSSIBLE SOLUTIONS:

- Set a specific time for lunch and **STICK TO IT**
- Have meetings in the office
- Set meetings right after lunch
- Have working lunches

## **ADAPTED STYLE**

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

- Uninhibited in making a creative sales presentation.
- Authority to carry out responsibility.
- Dealing with customers and clients efficiently.
- Independent in approaching customers or clients.
- Anticipating and using creative ways to assist clients in problem solving.
- A resourceful, eager self-starter.
- Unafraid to overstep authority when necessary to make a sale.
- Firm, unbending dedication to completing sales projects.
- Using authority and responsibility for completing the sale.
- Exhibiting confidence in approaching customers.
- Sharing his personal opinion with a client or customer.
- Using a creative approach in selling new and innovative services or products.

# NATURAL AND ADAPTED SELLING STYLE

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

## PROBLEMS - CHALLENGES (Natural)

John tends to attack sales challenges in a demanding, driving and self-willed manner. He is individualistic in his approach and will actively seek to achieve sales goals. He likes authority along with his responsibility and a territory that will constantly challenge him to perform up to his ability.

## PROBLEMS - CHALLENGES (Adapted)

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

## PEOPLE - CONTACTS (Natural)

John's natural style is to use persuasion and emotion to the extreme. He is positive and seeks to win by the virtue of his oral skills. He will try to convince you that what he is saying is not only right, but is exactly what is needed. He displays enthusiasm for almost everything with every prospect.

## PEOPLE - CONTACTS (Adapted)

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

# NATURAL AND ADAPTED SELLING STYLE

## PACE - CONSISTENCY (Natural)

John enjoys a sales environment that needs a consistent approach. He will change approach if the new direction is meaningful and consistent with past experience. He enjoys selling quality products that he feels are reliable and dependable.

## PACE - CONSISTENCY (Adapted)

John sees the need to be involved in as many activities as his schedule will allow. He has a tendency to make everything a number one priority and wishes that everyone had his sense of urgency.

## PROCEDURES - CONSTRAINTS (Natural)

John wants to be seen as his own person who is willing and capable of interpreting the company policies to ensure the best results and allow him creative and innovative methods of selling. He wants to be measured on his sales results, not how he achieved the results.

## PROCEDURES - CONSTRAINTS (Adapted)

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

# KEYS TO MOTIVATING

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

John wants:

- Exposure to those who appreciate his sales results.
- Power and authority to take the risks to achieve sales results.
- Unusual, new or difficult products to sell.
- No close supervision.
- Independence.
- Sales meetings that allow him to ventilate his emotions.
- Opportunity for rapid advancement.
- The chance to have fun (play hard--work hard).
- To be seen as a leader.
- New challenges and problems to solve.
- Prestige, position and titles so he can control the destiny of others.
- Exciting place to work.

# KEYS TO MANAGING

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

John needs:

- To handle routine paperwork only once.
- Documentation of expected sales results.
- Better organization of record keeping.
- A tolerant sales manager.
- Objectivity in managing a sales territory.
- To maintain focus on results and not sacrifice productivity just to make everyone happy.
- Recognition that limits and rules do exist (and why).
- People to work and associate with.
- More control of body language.
- Objectivity when dealing with customers because of his high trust level.
- To focus conversations on work activities--less socializing.
- To be informed of things which affect him.

# STRENGTHS AND WEAKNESSES

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

- **STRENGTH** - Good interpersonal relationship skills. **POTENTIAL WEAKNESS** - May be too lenient and have trouble disciplining.
- **STRENGTH** - Value people over things. **POTENTIAL WEAKNESS** - Have difficulty planning and controlling time if people are involved.
- **STRENGTH** - Problem solver. **POTENTIAL WEAKNESS** - Act impulsively and make decisions based on a surface analysis.
- **STRENGTH** - People-oriented. **POTENTIAL WEAKNESS** - Unrealistic in appraising people--tends to trust people indiscriminately.
- **STRENGTH** - Good communicator and good at meeting new people. **POTENTIAL WEAKNESS** - May oversell himself and turn others off.

Jane Doe



**Blueprint For Success™**  
**Success Version**

**Jane Doe**  
**ABC Company**  
**Accounting Manager**  
**1-14-2003**

**To return to your blueprint for future updates,  
use this response link and password:  
KK5347WK-96VWTK47**



# Blueprint For Success™

## Success Version

### Personal Effectiveness

Your Blueprint For Success™ is a summary document that is designed to be used both personally and professionally in increasing your personal effectiveness. Refer to your Interactive Insights™ Success Version report for full details on your behavioral style.

You selected all the statements below when completing the previous sections. They represent key factors to success. Put this information to work as soon as possible. The key to success is communicating and acting on these valuable insights.

#### Jane's Natural Behavioral Style

- Jane likes to win through persistence. She uses her strong, steady tendencies to accomplish her goals.
- She likes a consistent pace in her life, not too fast and not too slow.
- She requires many good reasons, as well as the benefits involved, before agreeing to making changes.
- She is good at concentrating in order to listen and learn. She is not easily distracted by peripheral activity.
- At times she can be quite skeptical. Others may misinterpret this strength as a negative one, but she is only seeking needed data.

#### Jane's Problem Solving Style

- She may want to think over major decisions before acting. She must be convinced that actions will produce the desired result.
- When faced with a tough decision, she will seek information and analyze it thoroughly.
- Once she has arrived at a decision, she can be tough-minded and unbending. She has made her decision after gathering much data, and she probably won't want to repeat the process.
- She is persistent and persevering in her approach to achieving goals.
- She tries to use balanced judgment. She is the person who brings stability to the entire team.

#### Jane's Communication Style

- Rarely does she display her emotions; that is, she projects a good poker face. Others may get the feeling that she is unfriendly, when in reality she is not.
- She can be outgoing at times. Basically introverted, she will "engage" in social conversation when the occasion warrants.
- She is more motivated by logic than emotion. To her, logic represents tangible research.
- She may guard some information unless she is asked specific questions. She will not willingly share unless she is comfortable with the knowledge she possesses about the topic.
- She tends to be possessive of information; that is, she doesn't voluntarily share information with others outside of her team. This may be a blessing, or a curse, to her superiors.

#### Jane's Unique Talents

- Proficient and skilled in her technical specialty.

- Service-oriented.
- Comprehensive in problem solving.
- Dependable team player.
- Accurate and intuitive.

## Do's and Don'ts for communicating with Jane

When communicating with Jane:

- Support her principles; use a thoughtful approach; build your credibility by listing pros and cons to any suggestion you make.
- Make an organized presentation of your position, if you disagree.
- Patiently draw out personal goals and work with her to help her achieve those goals; listen and be responsive.
- Make an organized contribution to her efforts, present specifics and do what you say you can do.
- Give her time to be thorough, when appropriate.

Don't do this when communicating with Jane:

- Rush the decision-making process.
- Be abrupt and rapid.
- Be domineering or demanding; don't threaten with position power.
- Use gimmicks or clever, quick manipulations.
- Force her to respond quickly to your objectives. Don't say "Here's how I see it."



# Blueprint For Success™

## Success Version

### Self-Development Plan

1. **How your unique talents can maximize your job performance, increase your productivity and contribute to your job satisfaction:**

Leverage my proficiency in accounting skills to bring a high degree of quality to the accounting department's operations. My service orientation and strengths as a team leader will help me increase the department's productivity through effective management of not only my own tasks but my staff's as well. When I do an excellent job it contributes a lot to my own career satisfaction through self pride.

2. **These specific actions are needed for you to take full advantage of your unique talents:**

A. **Do MORE of the following:**

Take every opportunity to enhance my staff management skills through practice and feedback (from my manager and coach).

B. **Do LESS of the following:**

Doing everything myself to be sure it's completed correctly and on time.

C. **BEGIN doing the following consistently:**

Delegating increasingly more of the workload to competent staff members.

D. **Obstacles or barriers that could prevent you from making these changes:**

My staff sometimes does not complete their tasks accurately.

3. **How you can work around or remove these barriers:**

Get to the root of the performance problems and make appropriate decisions.

4. **These are your most important short term PERFORMANCE GOALS (within 2 years) and specific action steps to reach those goals.**

Lower our 60-90 day accounts receivable from an average of \$10k/month to \$1k/month; find a less expensive off-site records storage facility with better retrieval services; lower our company's operating costs from \$300k/month to \$230k/month (or \$840k/year).

5. **These are your most important long-term CAREER GOALS and the action steps or intermediate goals to reach them.**

Widen my business experience every chance I get; earn my MBA in 3 years (part time studies); rise to the position of a CFO before I'm 45; earn over \$120k/year.

6. **One thing that will signify that you have reached a major milestone:**

When I have my MBA.

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**Your Name:**

**Today's Date:**  **Start Date:**  **Review Date:**

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