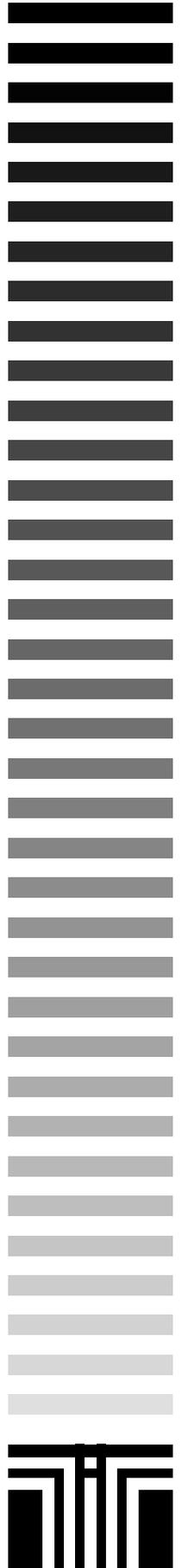


# Interactive Insights™

Success Version

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

**Jane Doe**  
Accounting Manager  
ABC Company  
4-14-2004



# INTRODUCTION

This Interactive Insights™ Success 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*

# GENERAL CHARACTERISTICS

*Based on Jane's responses, the report has selected general statements to provide a broad understanding of her work style. These statements identify the basic natural behavior that she brings to the job. That is, if left on her own, these statements identify HOW SHE WOULD CHOOSE TO DO THE JOB. Use the general characteristics to gain a better understanding of Jane's natural behavior.*

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. Jane has great abilities to concentrate on details. This concentration may be intense. She is usually steady, easygoing and relaxed. At times she can be quite skeptical. Others may misinterpret this strength as a negative one, but she is only seeking needed data. She can be friendly with others in many situations, but primarily with groups of established friends and associates. She is sociable and enjoys the uniqueness of each human being. At times, Jane would like to slow the world down and cut out some of the activities people want her involved in. She is nondemonstrative and wants to be seen as an "anchor of reality" in a "sea of confusion."

Jane may tend to fight for her beliefs or those things she feels passionate about. 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. Jane tends to make decisions based on past experiences. She prefers the "tried and true." She may be reluctant to initiate new approaches to doing things. If she is shown the benefits, she will consider new procedures. She is persistent and persevering in her approach to achieving goals. She

## GENERAL CHARACTERISTICS

tries to use balanced judgment. She is the person who brings stability to the entire team.

Jane usually is considerate, compassionate and accepting of others; however, on some occasions can become stubborn. Stubbornness surfaces when her ideals and beliefs are confronted. 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. Jane remains aloof from active participation in unfamiliar groups. She will talk more, however, in a group of people she trusts and has known for a long time. 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. She is not easily triggered or explosive, but she may conceal some grievances because she doesn't always state her feelings.

## UNIQUE TALENTS

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

- People-oriented.
- Proficient and skilled in her technical specialty.
- Service-oriented.
- Comprehensive in problem solving.
- Dependable team player.
- Good at reconciling factions--is calming and adds stability.
- Accurate and intuitive.

# IDEAL ENVIRONMENT

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

- An environment dictated by logic rather than emotion.
- Familiar work environment with a predictable pattern.
- Prefers technical work, specializing in one area.
- A stable and predictable environment.
- An environment that allows time to change.
- Needs an opportunity to deal with people with whom a long-standing relationship has been established.
- Little conflict between people.
- An environment where she can use her intuitive thinking skills.

# CHECKLIST FOR COMMUNICATING

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

Do:

- Look for hurt feelings or personal reasons if you disagree.
- Draw up a scheduled approach to implementing action with a step-by-step timetable; assure her that there won't be surprises.
- 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.
- Provide personal assurances, clear, specific solutions with maximum guarantees.
- Patiently draw out personal goals and work with her to help her achieve those goals; listen and be responsive.
- Define clearly (preferably in writing) individual contributions.
- Make an organized contribution to her efforts, present specifics and do what you say you can do.
- Show sincere interest in her as a person. Find areas of common involvement and be candid and open.
- Provide solid, tangible, practical evidence.
- Give her time to be thorough, when appropriate.
- Present your case softly, nonthreateningly with a sincere tone of voice.

# **DON'TS ON COMMUNICATING**

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

- Rush the decision-making process.
- Make conflicting statements.
- Threaten, cajole, wheedle, coax or whimper.
- Be abrupt and rapid.
- Offer assurance and guarantees you can't fulfill.
- Be domineering or demanding; don't threaten with position power.
- Use gimmicks or clever, quick manipulations.
- Keep deciding for her, or she'll lose initiative. Don't leave her without backup support.
- Leave things to chance or luck.
- Force her to respond quickly to your objectives. Don't say "Here's how I see it."
- Make statements about the quality of her work unless you can prove it.
- Debate about facts and figures.

# COMMUNICATION TIPS

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

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

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

Factors that will create tension or dissatisfaction:

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

When communicating with a person who is magnetic, enthusiastic, friendly, demonstrative and political:

- Provide a warm and friendly environment.
- Don't deal with a lot of details (put them in writing).
- Ask "feeling" questions to draw their opinions or comments.

Factors that will create tension or dissatisfaction:

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

# COMMUNICATION TIPS

When communicating with a person who is patient, predictable, reliable, steady, relaxed and modest:

- Begin with a personal comment--break the ice.
- Present your case softly, nonthreateningly.
- Ask "how?" questions to draw their opinions.

Factors that will create tension or dissatisfaction:

- Rushing headlong into business.
- Being domineering or demanding.
- Forcing them to respond quickly to your objectives.

When communicating with a person who is dependent, neat, conservative, perfectionist, careful and compliant:

- Prepare your "case" in advance.
- Stick to business.
- Be accurate and realistic.

Factors that will create tension or dissatisfaction:

- Being giddy, casual, informal, loud.
- Pushing too hard or being unrealistic with deadlines.
- Being disorganized or messy.

# PERCEPTIONS

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

## "See Yourself As Others See You"

### SELF-PERCEPTION

Jane usually sees herself as being:

Considerate  
Good-Natured  
Team player

Thoughtful  
Dependable  
Good listener

### OTHERS' PERCEPTION

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

Nondemonstrative  
Unconcerned

Hesitant  
Inflexible

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

Possessive  
Detached

Stubborn  
Insensitive

# TIME WASTERS

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

## 1. POSTPONE THE UNPLEASANT

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

### POSSIBLE CAUSES:

- Like low-conflict environments and relationships
- Want to feel the success of accomplishment so the simple tasks are done first

### POSSIBLE SOLUTIONS:

- Change your routine and, for one week, do the unpleasant tasks first
- See the accomplishment of unpleasant tasks as an equal or even greater achievement of success
- Reward yourself for every unpleasant task that you complete without postponing
- Confront those people who are causing you discomfort and discuss the problems

## 2. RESISTING CHANGE

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

### POSSIBLE CAUSES:

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

### POSSIBLE SOLUTIONS:

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

# TIME WASTERS

## 3. FAILURE TO ANTICIPATE

Failure to anticipate is the lack of focusing on possible outcomes or requirements.

### POSSIBLE CAUSES:

- Expect only the best to happen
- Expect everyone else to do their best
- Trust the system to run well
- Focus on the here and now rather than the future
- Resist change

### POSSIBLE SOLUTIONS:

- Set aside a specific amount of time each day to consider outcome possibilities
- Talk with others who may have prior experience with a specific task or person

## 4. HABITS

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

### POSSIBLE CAUSES:

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

### POSSIBLE SOLUTIONS:

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

## 5. FAILURE TO SHARE INFORMATION

The failure to share information is the inability or unwillingness to discuss with others.

### POSSIBLE CAUSES:

- Don't think others want to know the information
- Unclear of the way the information will be used/received
- Wait until asked before sharing information

# TIME WASTERS

## POSSIBLE SOLUTIONS:

- Let others know that they need to ask for information
- Share with those whose opinions you trust

## 6. FAILURE TO CLARIFY PRECISE RESPONSIBILITIES WITH MANAGER

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

## POSSIBLE CAUSES:

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

## POSSIBLE SOLUTIONS:

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

## **ADAPTED STYLE**

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

- Projecting a limited display of emotion.
- Sensitivity to existing rules and regulations.
- Being precise in the collection of data.
- Limited contact with people.
- Traditional, quality-oriented work model to follow.
- Disciplined, meticulous attention to order.
- Maintaining a clean and organized work station.
- Accomplishing tasks without many people contacts.
- Critical appraisal of data.
- Precise, analytical approach to work tasks.
- Calculation of risks before taking action.
- Careful, thoughtful approach to decision making.

# NATURAL AND ADAPTED STYLE

*Jane's natural style of dealing with problems, people, pace of events and procedures may not always fit what the environment needs. This section will provide valuable information related to stress and the pressure to adapt to the environment.*

## PROBLEMS - CHALLENGES (Natural)

Jane is cautious in her approach to problem solving and does not attempt to demand that her view, or opinion, be accepted at face value. Jane likes to solve problems within the framework of a team environment. She will look for a compromise as opposed to a win-lose situation.

## PROBLEMS - CHALLENGES (Adapted)

Jane sees the need to be competitive, results-oriented and a little innovative in her approach to problem solving. She has a tendency to evaluate the risk before rushing into solving a problem.

## PEOPLE - CONTACTS (Natural)

Jane feels that the convincing of people can only be done within the framework of logical facts presented by totally objective people or machines. She rarely displays emotion when attempting to influence others.

## PEOPLE - CONTACTS (Adapted)

Jane will use an undemonstrative approach to influencing others. She prefers to let the facts and figures stand for themselves. Rarely will she embellish the facts. Her trust level is calculated on each interaction.

# NATURAL AND ADAPTED STYLE

## PACE - CONSISTENCY (Natural)

Jane is comfortable in an environment in which there are few projects going on concurrently. She is appreciative of the team concept and feels quite secure in an environment where the need to move from one activity to another quite quickly is held to a minimum.

## PACE - CONSISTENCY (Adapted)

Jane wants an environment that is variety-oriented. She feels a great sense of urgency to get things completed quickly. She is eager to accept change and work on many activities.

## PROCEDURES - CONSTRAINTS (Natural)

Jane is concerned with doing things right. She can be quite worrisome and possibly fearful that mistakes will crop into the procedure. She will follow rules and procedures to the letter and feels comfortable in a situation in which exact standards and written procedures are the rule of the day.

## PROCEDURES - CONSTRAINTS (Adapted)

Jane shows little discomfort when comparing her basic (natural) style to her response to the environment (adapted) style. The difference is not significant and Jane sees little or no need to change her response to the environment.

# KEYS TO MOTIVATING

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

Jane wants:

- Logical arguments.
- Straight talk supported with facts.
- Time away from people--to be alone.
- Objectivity.
- Limited exposure to new procedures.
- Limited socializing.
- To be recognized for her continuance of quality work.
- To be part of a quality-oriented work group.
- Time to perform up to her high standards.
- Information in logical order.
- Instructions so she can do the job right the first time.
- An environment where she can ask specific questions--not just "beat around the bush."

# KEYS TO MANAGING

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

Jane needs:

- Conditioning prior to change.
- Capable associates with which to work.
- Support when under pressure to perform many activities quickly.
- To be encouraged to be more independent.
- Reassurances that she is doing the job right.
- Rewards in terms of tangible things, not just flattery and praise.
- A manager who delegates in detail.
- A warm and friendly work environment.
- An exact job description and expectations in writing.
- The facts in a logical sequence.
- Tangible work.
- Complete instructions on her assignments.
- A work environment without much conflict.

# STRENGTHS AND WEAKNESSES

*Jane'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 her 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 - Will work for a cause and a leader. POTENTIAL WEAKNESS - May procrastinate on decisions when in the leadership role.
- STRENGTH - Loyal and patient. POTENTIAL WEAKNESS - May not project a sense of urgency.
- STRENGTH - Task-oriented. POTENTIAL WEAKNESS - May bury herself in the task and fail to deal with people problems in a timely fashion.
- STRENGTH - Good listener. POTENTIAL WEAKNESS - May be possessive of information.
- STRENGTH - Stable and persistent. POTENTIAL WEAKNESS - Be relaxed and contented with things the way they are.
- STRENGTH - Predictable and reliable. POTENTIAL WEAKNESS - May be inflexible and resist change.
- STRENGTH - Remains calm during conflict--a team player. POTENTIAL WEAKNESS - May give others a false sense of compliance because she fights passively.

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.

---

**Your Name:**

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

---

