



SUCCESS FACTOR ANALYSIS

Candidate: Rodney Sample
Company: Sample Company, Inc.
Job: Sales Representative
Date: June 16, 2016

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Part 1: Executive Summary

Analyst Link Job Suitability Analysis

SFA Employee/Manager Format Distributed by:

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UNDERSTANDING THE SFA

PAGE 3: The Success Factor Analysis

Shows the SFA rating and ranking of the examinee compared to successful people in the same type of job numerically and graphically.

PAGE 4: Manager's Report

Shows behavioral and motivational strength and includes analyst comments along with Natural and Adapted work-style profile.

PAGE 5: Detailed Development Guide

This page shows comparison of candidate traits to the standard and indicates areas in need of improvement ranging from minor issues to those requiring professional assistance.

PAGE 6: Natural/Adapted Behavioral Focus

This page indicates any stress issues and shows the examinee's current focus.

Reducing Turnover: On-boarding and Orientation for the new hire

A new hire generally makes a career decision within the first week of employment. The answer to the question "Is this a good career move" and the key to reducing turnover lies in how the new hire and their manager bond during the first week of employment. Establishing strong communication with their manager is the key to developing a positive attitude about the job and the company.

SUCCESS FACTOR ANALYSIS

Rank as: Sales Representative

Company: Sample Company, Inc.

Examinee: **Rodney Sample**

Overall Job Suitability: 72% Above Average

Selling Skill Rating: 74.00% Merged Into Total

	Rodney Sample	Ranking	Pre Hire Standard
Achievement Factors	7.78	Above Average	7.68
Task Orientation Factors	5.50	Marginal	5.60
Merged Selling Factors	6.96	Good	6.76
Reliability Factors	4.10	Below Average	4.83
Compensating Factors	6.08	Good	6.04

Turnover Propensity: Possible Risk

Work on Commission: Good



MANAGERS REPORT

Regarding: **Rodney Sample**
As: **Sales Executive**

Sample Company, Inc.

Level of Supervision

Overall Suitability

Work Experience

Job History

Pre Hire Sales Representative

Almost None

72%

10 years

3 jobs in the last 10 years

Behavior		Score	Ranking	Pre Hire Standard		
Merged Sales Traits		6.96	Good	6.76		
Achievement Trait:		7.78	Above Average	7.68		
Task Orientation:		5.50	Marginal	5.60		
Consistency/Reliability:		4.10	Below Average	4.83		
Compensating Factors:		6.08	Good	6.04		
Behavioral Inventory*		6.70	Good			
3.00	4.00	5.00	6.00	7.00	8.00	9.00
Poor	Below Average	Marginal	Good	Above Average	Excellent	Superior

Overall Stress Factors

No Significant Stress

Advancement Potential

Not Significant

Natural Work Style

Persuading Promoter

Adapted Work Style

Promoting Persuader

ANALYST COMMENTS

- * An integrated score based on personality, job experience and education.
- Blue highlighting indicates most important job trait as selected by the test administrator.
- A grade equal to the standard is recommended for "key" items.
- Current sales orientation matches those who are focusing on client relations and servicing.
- Achievement traits are in decline. Probe Cause.
- Provide training as recommended on the detailed development guide.
- All ratings based on a scale of 1 to 10. 5.00 is a passing albeit marginal grade.

DETAILED DEVELOPMENT GUIDE

Regarding: **Rodney Sample**
As: **Sales Executive**

INSTRUCTIONS:

Carefully review the training and development recommendations listed on this page. Discuss them with your Sales Manager or Facilitator. Keep in mind they refer to "Behavioral and Motivational" traits, not skills.

Yellow highlighting indicates traits considered important for this position.

Blue highlights the most crucial characteristic that predicts success in this position.

Traits & Propensities	CURRENT FOCUS		TRAINING RECOMMENDATIONS	Stress
Sample Company, Inc.	Examinee	Standard		
SELLING PROPENSITY				
Closing	9.40	9.03		-
Handling Objections	8.70	8.38		-
Empathy/Listening Skills	4.70	5.00	Minor review helpful.	-
Preparation/Thoroughness	4.25	5.00	Some training recommended.	-
Presentations/Communication	8.55	8.48		-
Prospecting/Rejection	8.05	8.08		-
Follow-up/Thoroughness	4.70	5.30	Some training recommended.	-
Servicing after the sale	4.95	5.15	Minor review helpful.	-
Merged Sales Average	6.66	6.80		
ACHIEVEMENT PROPENSITY				
Challenge/Competitiveness	7.60	7.43		-
Persuasiveness	8.45	8.45		-
Results/Goal Orientation	7.05	7.05		-
Self Confidence	7.45	7.43		-
Motivation/Self Directed	8.35	8.03		-
Achievement Trait Average	7.78	7.68		
TASK ORIENTATION PROPENSITY				
Client Relations/Sociable	7.05	6.63		-
Information/Fact Gathering	4.85	5.70	Some training recommended.	-
Paperwork/Reports	4.60	4.48		-
Task Orientation Average	5.50	5.60		
Consistency/Reliability				
	4.10	4.83	Overall training recommended.	

Natural/Adapted Behavioral Focus

Prepared For: **Rodney Sample**
As: **Sales Representative**

Understanding Change:

All employees constantly adapt their behavior to the needs in their work environment. The ratings listed here compare the "Natural" traits you bring to the job against the "Adapted" traits upon which you are focusing in response to the perceived requirements of the job. These are considered to be transitional scores that are based on your current focus. The interpreted scores may be found within the "Development Guide." They are adjusted to allow for your current focus depending on whether this report is for Pre-Hire, Current Job Suitability, or Job development.

If the difference between Natural and Adapted behavior is greater than 1.50, it indicates a change in focus that is outside your normal range and may, even if the focus is positive, cause stress. The greater the difference the more intense the stress may become. Minor differences (1.00 or less) are often normal adaptations to your concept of the needs of the job. Major differences, (more than 2.00) indicate job mismatch and are the primary causes of stress and job dissatisfaction.

Review this page with your manager or facilitator to determine if your current focus should be redirected.

	Natural	Adapted	Trait Intensity	Stress
Closing	9.50	9.25	Declining	-
Handling Objections	9.00	8.25	Declining	-
Empathy/Listening Skills	4.50	5.00	Increased Focus	-
Preparation/Thoroughness	4.25	4.25	Static	-
Presentations/Communication	8.75	8.25	Declining	-
Prospecting/Rejection	8.25	7.75	Declining	-
Follow-up/Thoroughness	4.50	5.00	Increased Focus	-
Servicing after the sale	4.75	5.25	Increased Focus	-
Sales Average	6.69	6.62	Declining Sales Focus	
Challenge/Competitiveness	8.00	7.00	Declining	-
Persuasiveness	8.75	8.00	Declining	-
Results/Goal Orientation	7.25	6.75	Declining	-
Self Confidence	7.75	7.00	Declining	-
Motivation/Self Directed	8.75	7.75	Declining	-
Achievement Trait Average	8.10	7.30	Declining Achievement Focus	
Client Relations/Sociable	7.25	6.75	Declining	-
Information/Fact Gathering	4.75	5.00	Increased Focus	-
Paperwork/Reports	4.50	4.75	Increased Focus	-
Task Orientation Average	5.50	5.50	Static Overall Task Focus	
Consistency/Reliability	4.00	4.25	Increased Reliability Focus	



SUCCESS FACTOR ANALYSIS

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Part 2: Behavioral and Motivational Analysis

New Hire Development Guide

UNDERSTANDING THE SFA

Behavioral Hierarchy

An analysis of the examinee's strengths and weaknesses

Information:

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.

Rankings

The examinee's key traits are shown on the following pages, starting with their greatest strengths and ending with traits that may require additional development.

- Ratings of 9.0 to 10 indicate superior levels of competency
- Ratings of 7.0 to 8.5 are above average
- Ratings of 6.0 to 6.5 are average
- Ratings of 5.5 to 5.75 are marginal/trainable
- Ratings of 4.0 to 4.75 are considered below average
- Ratings of 3.0 to 3.75 are poor
- Ratings of less than 3.0 are areas of concern

Value to the Organization

This section of the report identifies the specific talents and behavior Rodney 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.

- Few dull moments.
- Ability to handle many activities and customers at one time.
- Verbalizes his feelings.
- Optimistic and enthusiastic.
- Accomplishes goals through people.
- People-oriented.
- Creative problem-solving.

Ideal Environment

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

- Democratic supervisor with whom he can associate.
- Freedom of movement.
- Activities, and more activities.
- Assignments with a high degree of people contacts.
- Freedom from long, detailed reports.
- Support team with sense of urgency.
- New products and new ideas to sell.
- Work tasks that change from time to time.

Sales Characteristics

Based on Rodney'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.

Rodney maintains a high trust level; that is, he trusts that people will make good on their promises. He may be seen as somewhat impulsive. He likes new products and often is the first in his neighborhood to buy the latest things. He prefers to sell new, innovative products or services. In fact, he often uses creative ways to sell his products or services. Being optimistic and enthusiastic, he is good at generating enthusiasm in others. Sometimes his enthusiasm is what sells his products or services, but sometimes other buyers may be offended. 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. He likes cold calls because they present a challenge. He feels his verbal skills will help him win. Every cold call provides an opportunity to win friends and influence people. Inclined to talk smoothly, readily and at length, he loves the opportunity to verbalize. Sales presents an opportunity for him to use this great attribute.

Rodney frequently uses emotion and active body language in his sales presentation. With some buyers this could be detrimental because they may see him as being superficial. His presentation may not be logical enough for some buyers. He has good intentions, but may become excited and jump around in the presentation. This may cause buyers to ask questions or raise objections to support the need for a logical presentation. He has probably been known to answer objections even if he has never heard the objection before. He will rely on his quick thinking and verbal skills to meet the challenge. He may promise how his product will solve the prospect's problems. Sometimes he becomes overly optimistic about the actual results his products will deliver. He doesn't necessarily do this intentionally, but reflects his optimistic view of the product. Rodney experiences difficulty in telling a prospect that he doesn't have the answer to the prospect's objections. His natural sales style attempts to answer the objections even if he lacks the proper data to do so. He would rather take the risk than admit failure. Some see him as a natural born salesperson but what they really see is his ability to talk smoothly and readily on most subjects. He quickly shares his opinion on most topics.

Rodney Sample

Sales Characteristics Continued

Rodney 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. Rodney'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. He may be positive and direct with his closes. He will be friendly and persistent as he attempts to close the sale. He 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. Rodney probably has several favorite closes. He needs to evaluate the way he is using them and if they are appropriate to the sales situation. He can be seen as a good closer. However, he may postpone the close until giving the complete sales pitch. Observers have actually seen him sell the product and then buy it back. He should guard against excessive talking and close at the appropriate time.

Rodney Sample

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 Rodney. 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 Rodney most frequently.

Ways to Communicate:

- Expect acceptance without a lot of questions.
- Not deal with details, put them in writing, pin him to modes of action.
- Give strokes for his involvement.
- Put projects in writing with deadlines.
- Be specific and leave nothing to chance.
- Be open, honest and informal.
- Use his jargon.
- Offer special, immediate and extra incentives for his willingness to take risks.
- Verify that the message was heard.
- Provide testimonials from people he sees as important.
- Provide ideas for implementing action.
- Ask for his opinions/ideas regarding people.
- Use enough time to be stimulating, fun-loving, fast-moving.

Checklist for Communicating Continued

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

Ways NOT to Communicate:

Take credit for his ideas.

Forget to follow-up.

Dictate to him.

Kid around too much, or "stick to the agenda" too much.

Be dogmatic.

Waste time trying to be impersonal, judgmental, or too task-oriented.

Drive on to facts, figures, alternatives or abstractions.

Legislate or muffle--don't overcontrol the conversation.

Be put off by his "cockiness."

Be curt, cold or tight-lipped.

"Dream" with him or you'll lose time.

Perceptions

See Yourself as Others See You

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

Self-Perception

Rodney usually sees himself as being:

- Enthusiastic
- Charming
- Persuasive
- Outgoing
- Inspiring
- Optimistic

Others' Perception - Moderate

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

- Self-Promoting
- Overly Optimistic
- Glib
- Unrealistic

Others' Perception - Extreme

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

- Overly Confident
- Poor Listener
- Talkative
- Self-Promoter

Keys to Motivating

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

Rodney wants:

- A friendly work environment.
- Freedom to talk and participate in sales meetings.
- To be seen as a leader.
- New challenges and problems to solve.
- Power and authority to take the risks to achieve sales results.
- Working conditions with freedom to move and to talk to people.
- A manager who practices participative management.
- Opportunity for rapid advancement.
- Work assignments that provide opportunity for recognition.
- To be trusted.
- Prestige, position and titles so he can control the destiny of others.

Keys to Managing

In this section are some needs which must be met in order for Rodney 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 Rodney and identify 3 or 4 statements that are most important to him. This allows Rodney to participate in forming his own personal management plan.

Rodney needs:

- Budgets to help prioritize his expenses.
- People to work and associate with.
- More control of body language.
- Consistency.
- To handle routine paperwork only once.
- To mask emotions when appropriate.
- Better organization of record keeping.
- More logical presentations--less emotional.
- Participatory management.
- Deadlines for completion of work.
- Objectivity in managing a sales territory.
- To pace himself and set priorities.
- Appreciation of slower-moving people and customers.

Natural and Adapted Selling Style

Rodney'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

Rodney is quite inquisitive and wants to be seen as an outwardly competitive person. He is results-oriented and likes to be innovative in his sales approach. He is not necessarily confrontational by nature, but will not turn down the opportunity for confrontation if the opportunity exists.

Adapted

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

PEOPLE - CONTACTS

Natural

Rodney is enthusiastic about his ability to influence others. He prefers an environment in which he has the opportunity to deal with different types of individuals. He is trusting and also wants to be trusted.

Adapted

Rodney feels the environment calls for him to be sociable and optimistic. He will trust others and wants a positive environment in which to sell.

Rodney Sample

Natural and Adapted Selling Style Continued

PACE - CONSISTENCY

Natural

Rodney wants a sales environment that is intense and demanding. He feels a great sense of urgency to close his prospects quickly. He feels comfortable selling new products that meet his prospect's needs.

Adapted

Rodney feels to be successful in his present sales environment he must see many prospects/customers. He feels mobility is one of his strengths. He can go in many different directions with ease and control.

PROCEDURES - CONSTRAINTS

Natural

Rodney is striving to be independent and self-directed. He is most comfortable in a sales environment where rules and procedures can be interpreted to meet the needs of his customer in certain situations.

Adapted

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

Rodney Sample

Adapted Style

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

- Adaptable in meeting the needs of clients or customers.
- Verbally stressing the benefits of his product or service.
- Generating enthusiasm in others.
- Anticipating and using creative ways to assist clients in problem solving.
- Challenging the status-quo.
- Skillfully using humor to persuade his clients or customers.
- Dealing with customers and clients efficiently.
- Excited about available new products or services.
- Ability to handle many new products or services.
- Meeting customers either formally or informally.
- Speaking smoothly and emotionally with his customers or clients.
- Telling clients or customers about the "big picture."
- Positive response to a client's objections.

Areas for Improvement

In this area is a listing of possible limitations without regard to a specific job. Review with Rodney and cross out those limitations that do not apply. Highlight 1 to 3 limitations that are hindering his performance and develop an action plan to eliminate or reduce this hindrance.

Rodney has a tendency to:

- Have difficulty planning and controlling time.
- Give away products or services to make client happy.
- Not have all the necessary brochures and sales aids.
- Be careless and ramble in the sales presentation.
- Make promises he can't keep.
- Be more concerned with popularity than tangible results, if popularity is rewarded.
- Sell new accounts rather than service present ones.
- "Oversell" or talk his way out of a sale by focusing on irrelevant things.