



Sales Manager's Coaching Report

For Jane Doe

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Sales Manager's Coaching Report

For: Jane Doe

This Sales Manager's Coaching Report should not be used as a selection tool to reject candidates. This unique report has been designed to help you more effectively coach or supervise your sales person to higher levels of productivity based upon his or her unique personality.

The following "Basic Eight" personality traits are each independent factors that have resulted from your candidate's responses to the Craft Personality Questionnaire's statements. Extensive research over the past 20 years has found that these eight factors can be combined in different ways to predict dozens of different personality traits found in other questionnaires. Though these Combination Traits (see this page) are generally less predictive than the "Basic Eight" traits due to weighting and averaging, they can still be quite valuable when coaching or supervising your employees. The pages that contain Coaching Recommendations are based upon the more predictable "Basic Eight" primary traits. Expect minor contradictions between the secondary traits and these Coaching Recommendations.

Basic Eight Traits	VERY LOW	LOW	MOD LOW	MOD HIGH	HIGH	VERY HIGH
Goal-orientation (Go)						100
Need for Control (Nc)					78	
Social Confidence (Sc)					74	
Social Drive (Sd)					61	
Detail-orientation (Do)	8					
Good Impression (Gi)			46			
Need to Nurture (Nn)	3					
Skepticism (Sk)						89

Combination Traits

0 20 40 60 80 100

Ego Drive to Achieve Immediate Results

Empathy to Understand/Relate to Others

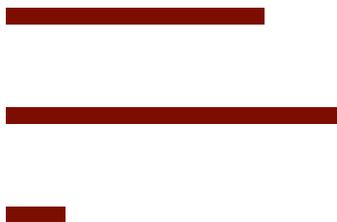
Ability to Cope with Stress/Change

Objectivity to Make Impartial Decisions

Self-reliance to Act Independently

Patience/Tolerance in Relationships

Efficiency to Manage Time/Resources





Sales Manager's Coaching Report

For: Jane Doe

For each of the following job duties, your salesperson receives a single percentile score that describes his or her compatibility, based upon this Personality & Motivation dimension of success. High and Very High scores indicate a compatibility with that job duty while Low and Very Low scores indicate a lack of compatibility that requires compensation.

It is important to note that these Sales Performance Trait scores only relate to your salesperson's personality and motivation, not intelligence, sales skills or self-discipline. If they receive a Low or Very Low score on any Sales Performance Trait listed below, compensation in the form of additional sales training or accountability systems may still be required.

Sales Performance Traits

Sense of Urgency to get a Quick-start

Creativity/Insight to Sell Intangible Services

Confidence/Courage to Close the Sale

Drive/Motivation to Prospect for New Leads

Sensitivity to Tactfully Answer Objections

Patience to Tolerate Boring Sales Processes

Capacity to Work Alone Without Affiliation

Resilience and Objectivity to Handle Rejection

Receptivity to Coaching/Supervision

Charisma to Influence/Motivate Others to Buy

Job Loyalty to Stay with a Single Employer

Optimistic Attitude to Handle Ups and Downs

Desire to Achieve Results as Part of a Team

Desire to Patiently Serve Customer's Needs

Patience to Accurately Analyze Data

Capacity to Listen and Determine Needs

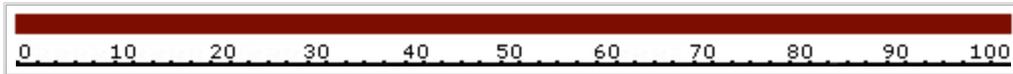
Ability to Handle Interruptions



Sales Manager's Coaching Report

For: Jane Doe

Goal-orientation (Go)



Goal-orientation Score: 100%

Recommended Coaching Hours: 0

Summary Statement - - Ms. Doe is so results-oriented that she is impatient and restless when it comes to pursuing goals. Her "Go" score can be both a blessing and a problem. On one hand, she has the dynamic drive and creativity to achieve short-term goals while on the other hand, she can become restless and easily bored if she is obstructed or delayed by repetitive or nonessential job duties. Sales personnel with this "Racehorse" temperament can be highly successful if they also have the persistence and self-discipline to "stay on the track" and keep from being distracted. In addition, they have very little tolerance for failure. If Ms. Doe lacks the sales experience or training to achieve early results or lacks the role models to emulate, she will quickly become discouraged and seek employment elsewhere. The comments associated with this high (61%-100%) "Go" score become much more obvious as her "Go" score approaches 100% and much less obvious as the score approaches 61%.

Coaching Recommendations - - Ms. Doe does not need to be motivated in the traditional way since she is highly driven to reach short-term goals. As long as the goal is desirable, well defined, and attainable, she will devote significant time and energy to attaining it. First, discover what it is that most motivates her. Racehorses are typically motivated to be financially well off and to be in control/independent (See "Nc" Score). Some are highly motivated by group recognition (See "Sd" Score). Whatever the goal or need, relate its attainment back to high levels of initial opener activity. Define initial openers as "face-to-face meetings that uncover basic needs." Make sure she "buys into" a weekly commitment that is realistic and attainable. Beware of her inconsistency. Racehorses are so goal-oriented that they will shift to fact-finders and closing interviews and ignore the less exciting job duties such as prospecting and openers. Therefore, the pipeline can quickly run dry, and she will have high productivity one month and low productivity the next. To reduce turnover, it is imperative to keep their pipeline consistently full of initial opening activity. Racehorses will only quit when they have closed most of their open cases and have little pending business. If you help them keep their pipeline full, they will be too busy to think about other options. As long as Ms. Doe has face-to-face openers with enough prospects, her goal-oriented drive will naturally result in a high number of closing interviews and sales. It is the sales manager's responsibility to show that there is definitely a relationship between Ms. Doe's

intense work effort and the desired results. If she is unable to achieve early success, she will become easily frustrated and de-motivated. Causes of early frustration could include a lack of basic prospecting or closing skills (or available training), licensing delays, excessive paperwork or government compliance requirements, or an authoritative manager who does not respect her need for autonomy and creativity.

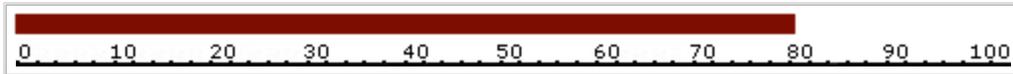
Important Note: It is important to note that Racehorses are restless and thrive on variety and change. Approximately every two years, she will get bored with the status quo and attempt to change something significant to help her avoid burnout. It is up to the manager to understand this periodic need and take the initiative before she decides to find another career opportunity or employer. Since it is inevitable that this Racehorse will seek greener pastures, the manager needs to change Ms. Doe's job description/goals, market niche, office space, compensation, or responsibilities (a supervisory/management position) every two years to satisfy her need for change.



Sales Manager's Coaching Report

For: Jane Doe

Need for Control (Nc)



Need for Control Score: 78%

Recommended Coaching Hours: 0

Summary Statement - - At times, Ms. Doe's desire for harmonious relationships with co-workers and managers is in conflict with her need for control and independence. If she is forced to work with other salespeople on major accounts, she is more likely to maintain control than defer to others. In selling situations, she often appears overly concerned with "being in charge" of a given situation. While she may appear aggressive at times, Ms. Doe simply seeks to have control over the outcome of her work. She feels most at ease when in control of her schedule and in situations where she is not forced to follow rigid guidelines in making sales. She will prefer working in situations that minimize daily control, such as working in a smaller office with minimal supervision. When this high Need for Control/Independence is coupled with a high Goal Orientation and a low Social Drive, (see Go and Sd scales of this report to see if this statement applies) it compounds her desire to work independently of supervision and accountability. These statements become more obvious as the "Nc" score approaches 100% (see graph above) and much less obvious as the "Nc" score approaches 60%.

Coaching Recommendations - - Even prior to being hired, potential conflicts between Ms. Doe's need for control and the job requirements should be discussed. For example, if weekly activity reports are required, this fact should be emphasized and agreed upon in advance as well as other requirements such as training, joint field work, supervisory meetings, etc. Remember that Ms. Doe's need for control and independence is a primary motivator that can be rewarded as an incentive to maintain satisfactory and consistent sales success. For example, let her know that she no longer has to attend sales training meetings if she meets your sales requirements over a specific period of time. While this Need for Control can be a definite asset when working alone, it can produce problems when she must give up control to maintain harmony. In situations that require shared sales commissions or shared responsibilities, for example, Ms. Doe's need for control can negatively impact relationships in the office, especially when her Need to Nurture score is low (See Nn score of this report to see if this statement applies). If such conflicts need to be resolved, feel free to meet with her and share this report page as a means of stimulating discussion. It is important to note that a need for control and independence can cause involuntary turnover if the culture of the organization is too autocratic and inflexible. Management should always be aware of Ms. Doe's

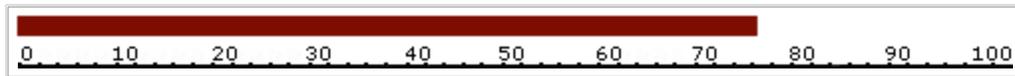
level of frustration with rules and requirements and be sensitive to her needs.



Sales Manager's Coaching Report

For: Jane Doe

Social Confidence (Sc)



Social Confidence Score: 74%

Recommended Coaching Hours: 0

Summary Statement - - Ms. Doe has the social self-confidence and assertiveness to make the presentation, answer the objections and closeout the sale. From the initial interview to the implied consent close, she has quite effective eye contact, poise, and emotional control. It is important to note that this scale does not measure aggressiveness or dominance. An individual may be quite assertive but do it in a sensitive and caring way. Another page in this report, the Need to Nurture ("Nn") page, tells you if her social confidence might be too authoritative and lack sensitivity, tact and diplomacy. Managers report that sales personnel with "Sc" scores above 80% have no problems making the sales presentation and closing the sale while Rep's who have lower scores appear somewhat less confident when it comes to asserting themselves. This is important to note since the sale of certain products/services require an exceptionally high level of self-confidence such as those that are "needed" much more than it may be wanted (insurance products, for example). Within this range of high "Sc" scores, these comments appear less obvious in the moderate ranges and much more obvious as Ms. Doe's "Sc" score approaches 100%.

Coaching Recommendations - - Because Ms. Doe's high Social Confidence ("Sc") score reflects high assertiveness which is an asset in nearly all sales positions, coaching recommendations are not necessary for this scale, by itself. Problems arise, however, when this high Social Confidence is combined with other personality traits described in this report. For example, if this "Sc" score is coupled with a low Need to Nurture (See Nn scale in this report), then intervention may be necessary to increase her sales effectiveness. In this case, she may be so matter-of-fact and "on task" that they fail to provide the interpersonal warmth necessary to bond with the buyer. She may not prioritize the customer service job duties that require nurturing. This problem will be compounded significantly if her Goal Orientation score is high (See "Go" score on previous page). Not only will she occasionally lack the sensitivity required to provide customer service, but her goal-orientation will produce impatience and intolerance for anyone who keeps her from reaching his goals. To minimize any of the negative affects of these interactions, train Ms. Doe to eliminate objections before they arise to avoid direct confrontation. With the No Money objection, she should always get a solid money commitment before proceeding to the closing interview. No Need is handled in an effective fact-finder,

which uncovers the primary "hot button." No Trust is addressed in the rapport building introduction when Ms. Doe's professionalism and the quality of the company and its products are emphasized.

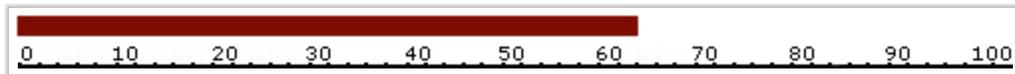
Join Ms. Doe on numerous presentations and customer service calls. Afterwards, begin and end the critique with positive reinforcement. Point out examples of poor customer service or lost sales that result from her matter-of-fact approach. In addition, sales training courses provided by local universities or consultants can provide helpful recommendations and group participation to overcome ineffective behaviors in this area.



Sales Manager's Coaching Report

For: Jane Doe

Social Drive (Sd)



Social Drive Score: 61%

Recommended Coaching Hours: 0

Summary Statement - - Status, prestige, and other forms of public recognition motivate Ms. Doe. Her need for feedback produces a motivation to collect casual relationships. As a result, she is a natural prospector who can "make a market" where none exists. Whether it's a brief encounter on an elevator or a Chamber of Commerce After Hours function, she thrives on the opportunity to make new friends. Her need for public recognition, however, can be a negative if she is required to work in a detached office or at home where such recognition and feedback are not readily available. The Rep with this high "Sd" score thrives best in large offices where contests, production boards, and newsletters can feed her need to be noticed and recognized. When it comes to the sales presentation, Ms. Doe may have a tendency to spend too much time talking and too little time assessing the specific "hot button" or need that will motivate the prospect to buy. On the other hand, the social drive associated with this high score gives her the "gift to gab" and the versatility to adapt to any social situation, two necessary traits for sales personnel. These comments become less obvious as her "Sd" score approaches 61% (see above) and much more obvious as the "Sd" score approaches 100%.

Coaching Recommendations - - Since she is naturally outgoing, it is important that the manager encourage Ms. Doe to join organizations that complement a specific market, such as business professionals or retirees. The manager should help her learn the difference between qualified and unqualified prospects, since it is her natural tendency to make friends without discerning their potential for purchasing her products/services. Without proper supervision in this area, she can be inefficient and ineffective. Any form of public recognition, especially the recognition that comes from competing against other Reps, both locally and nationally, easily motivates Ms. Doe. The sales manager should use periodic contests and award banquets to stimulate higher productivity. If she is in a small office, a detached office, or operating out of her home, it is important for the manager to bring her into a network of other reps through the use of either newsletters or electronic messaging. In larger offices, the manager may have to monitor the time Ms. Doe spends socializing with the other employees during work hours. This is especially true if this high social drive is coupled with a low sense of urgency as reflected by a low "Go" score (See previous pages to see if this last

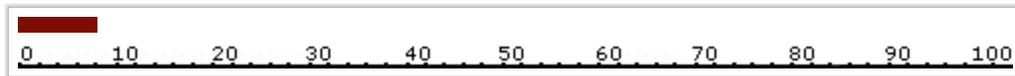
statement applies). The sales manager or supervisor should join her on at least 1-2 sales interviews per week to assess her effectiveness in the sales presentation. Watch for the telltale signs of an extended warm-up period where she spends too much time talking and not enough time listening. Is she trying too hard to be "liked" without establishing a professional presence in the interview? Is she spending so much time building rapport that little time is left to conduct a formal fact-finder? How effective is she when it comes to discovering the prospect's true buying motives? Does she occasionally bypass a closing opportunity because she is too busy making friends with the prospective buyer? It is important that the manager sits back and allows Ms. Doe an opportunity to learn from her mistakes and recognize how this high need for recognition can impede her productivity.



Sales Manager's Coaching Report

For: Jane Doe

Detail-orientation (Do)



Detail-orientation Score: 8%

Recommended Coaching Hours: 0.5

Summary Statement - - Though Ms. Doe may have the intelligence to handle facts, figures, and detailed analysis, she does not enjoy spending much time or energy in this area. Instead of spending time in the proposal, planning, and education/technical training process, she will choose to spend more time in the actual selling process, relying upon her intuitive insight, feelings and experiences to make the sale. She will avoid spending time on the product's features, and focus instead on the prospect's needs and benefits to determine the prospect's buying signals and hot buttons. It should be noted that this low "Do" score is an asset when it is combined with high intelligence. However, these low "Do" scores can cause problems with individuals who have lower intelligence who tend to avoid detailed analysis, because they are incapable of handling complex processes. The comments associated with Ms. Doe's low "Do" score become more obvious as her score approaches 0% and less obvious as the score approaches 40%.

Coaching Recommendations - - From the earliest stages of Ms. Doe's career, inform her of this tendency to avoid detailed analysis and its potential impact upon her productivity. If she lacks the intelligence or the analytical skills to perform the necessary job duties in the first place, this low "Do" score will compound the problem. Managers should watch for the telltale signs of sloppy record-keeping, poor time management, and delays in learning advanced concepts that require technical expertise. Look for an inability to properly prioritize the sales preparation, planning, and fact-finding processes. When the initial signs appear, quickly reinforce an accountability process, which helps to minimize the problem. For example, if she is not properly completing the application form, return the application immediately to her with a personal note. If she is not completing her activity reports, tie their completion to the training allowance (if possible) and delay the paycheck until the paperwork is properly completed. If necessary, meet with her on a regular basis to review the activity reports until their completion becomes a regular habit. Ms. Doe can be motivated to handle the details by rewarding her with freedom from direct supervision if the work is done properly. In addition, the possibility of receiving special secretarial assistance (funds or personnel) based upon productivity requirements can be a major source of sales motivation to her with her low "Do" score. It is important to participate in at least one or two joint interviews every week during the first month and one or two joint presentations per

month during Ms. Doe's first year. During this joint fieldwork, look for inadequate fact-finding efforts, inaccurate calculations, proposals that lack necessary details or compliance information, and "yellow-tablet" sales presentations that lack professionalism.

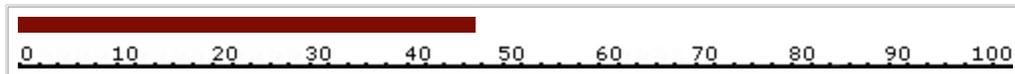
Important Note: When this tendency to avoid analysis is joined by a high (60%-100%) score on Goal Orientation (See "Go" score on previous page to see if this statement applies.) and/or low aptitude or intelligence, Ms. Doe can show signs of poor concentration. This problem may require managers to spend additional coaching time helping her attend to the job duties that require intense concentration and attention to detail (compliance, activity reports, call ratios, etc.).



Sales Manager's Coaching Report

For: Jane Doe

Good Impression (Gi)



Good Impression Score: 46%

Recommended Coaching Hours: 0

Summary Statement - - When individuals score in this moderate range on any personality scale, they are described by both sets of descriptions (see left and right sides of the above graph/table), but without the extremes. At times Ms. Doe will have a moderate need to leave a good impression and maintain exaggerated ego defenses while at other times she will appear more self-critical and vulnerable. When ego defenses are employed, she may deny problems until it is too late to correct them. When ego defenses are not being employed, she can be vulnerable to rejection and criticism. Because this individual will display behaviors characteristic of both high and low scores on this scale, it is often difficult to consistently predict their behavior. As a result, interaction affects from other scales take on added importance and are referenced. For example, if Ms. Doe has a low Need to Nurture ("Nn") score and a high Social Confidence("Sc") score (see previous pages), her moderately strong ego-defenses can still provide protection from rejection. When rejected or criticized by a prospect, her defenses are usually strong enough to realize that the buyer is criticizing the products/services she is selling, not her personally. Most of the time, criticism will "roll off her back." These reinforced ego defenses that result from this interaction will provide moderate resiliency against criticism, especially when she must make cold calls that have a low percentage of success. On the other hand, when the Need to Nurture is high and the Social Confidence is low, the moderate ego defenses associated with this "Gi" score can occasionally produce a vulnerability to rejection and criticism.

Coaching Recommendations - - This moderate "Gi" score is generally more of a strength than a weakness unless it is negatively impacted by other personality traits (see above). When moderate "Gi" is combined with higher assertiveness and lower sensitivity, it can result in exaggerations and reinforced ego defenses that require more accountability. Look for telltale signs of defensiveness, such as making excuses or blaming others, and beware of exaggerations. Pay close attention to existing processes that crosscheck Ms. Doe's data. Regularly analyze ratios between openers, fact-finders, closes, and sales. Train her to accurately complete activity reports and constantly remind her of their importance. Meet each week to review every new opened case and follow-up in subsequent meetings to see what happened with specific prospects. Join her on numerous sales calls to make sure that she is in total compliance with company requirements. When this

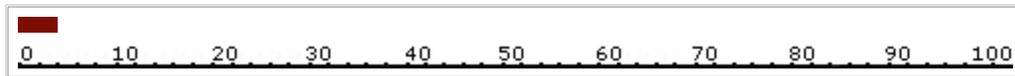
moderate "Gi" is combined with the opposite interactions (higher sensitivity and lower assertiveness) closely monitor Ms. Doe 's attitude, especially when making calls. When rejection or criticism eventually takes its toll, 1) reinforce her belief in your products/services, 2) reinforce confidence by making sure she has extensive product knowledge and sales training, and 3) remind her that selling is a "numbers game" and that a "no" is one rejection closer to a sale.



Sales Manager's Coaching Report

For: Jane Doe

Need to Nurture (Nn)



Need to Nurture Score: 3%

Recommended Coaching Hours: 2

Summary Statement - - Ms. Doe has a low sensitivity to the needs of others and an inability to express warm and loving emotions. She will initially find it difficult to assess the personal feelings, emotions, and needs of prospective buyers. She will typically gravitate over time to working daytime markets selling products to businesses and professionals who do not require an intimate, nurturing relationship. In the sales presentation, the rapport building part of the interview may be briefed as she moves directly to the formal fact-finder and close. If she is working with professionals where rapport building is not as important, it should not pose a problem. However, during her early months in the business when everyone's a prospect, it could jeopardize a sale. As a result of this low "Nn" score, there will be times when she misses sales opportunities in the personal and family markets and sales opportunities that result from personal referrals. Since Ms. Doe does not naturally spend a lot of time solving the personal problems of others, she has more time to dedicate to a more efficient, task-oriented sales effort. Time management is typically easier for sales personnel with low "Nn" scores because they prefer to spend their time with predictable tasks as opposed to unpredictable relationships. Quite often this low "Nn" score produces a high degree of self-discipline which can be seen in her habits, hobbies, and interests. On the other hand, this low score can contribute to low insight into the buyer's needs and low prioritization of the customer service job duties. While sales personnel with high "Nn" scores enjoy sending out Thank-You cards, writing personal notes, and sending gifts to prospects and clients, Ms. Doe would rather delegate these job duties to someone else, if possible. If she works in a smaller office or a detached office that does not provide the luxury of staff support personnel, her customer service activities may be ignored. These comments become less obvious as her "Nn" score approaches 40% and much more obvious as the score approaches 0%.

Coaching Recommendations - - Managers report that sales personnel with low "Nn" scores avoid sharing their emotions and feelings and, as a result, the manager seldom knows what she is thinking or feeling. When Ms. Doe has a personal problem, the manager finds out about it too late to do anything about it. The manager should schedule occasional meetings outside of the office (for lunch or coffee) which are designed to tap into her feelings and frustrations and offer assistance if it is needed. Early in her career, consider directing her to work in more

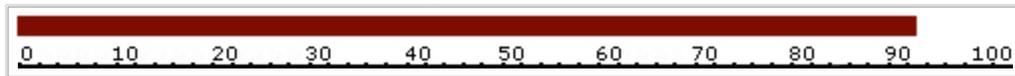
personal or family markets. The new salesperson can gravitate too early into the business and professional markets that require the sale of big-ticket items before there is enough knowledge and experience to make these sophisticated sales. The only exceptions to this rule are if she 1) has a significant existing professional/business market, 2) already has knowledge and experience of the market and its products, and 3) the manager is willing to do a lot of initial joint field work with her (or pair her with a senior salesperson). Ms. Doe should be trained thoroughly in the rapport-building process and taught how to work personal referrals. The manager should join her on 3-4 sales openers, fact-finders, and closes to make sure she is empathizing with the prospect and properly assessing the prospect's needs and concerns. The manager should also monitor her customer service and follow-through processes. If problems in this area affect productivity, consider CraftSystems' *Working Together* or *Professional Selling Workshops* (800-228-5866), training programs at your local university business departments, or industry mentors (see industry news journals).



Sales Manager's Coaching Report

For: Jane Doe

Skepticism (Sk)



Skepticism Score: 89%

Recommended Coaching Hours: 1.5

Summary Statement - - Ms. Doe either 1) lives in a larger, high crime city; 2) has been taken advantage of by others; and/or 3) has been raised to distrust other people in general until they earn her trust over time. Though there are times when this low trust can be an asset, such as with fiduciary responsibilities, low trust can negatively impact her attitude and cause communication problems with prospective buyers, fellow employees and management. When it comes to prospecting, she can be too selective in qualifying who she will call upon and too formal in the methods used, often preferring "cold" rather than "warm" lead generation systems. In addition, asking for referrals can become more of an unnatural act or discipline for a salesperson with low trust, since she can consider the referral process as an invasion of the prospect's or client's privacy. When it comes to relationships with other employees, she can have difficulty splitting or sharing sales. One slight impropriety by a fellow employee will be judged as a total lack of integrity with very little chance of redemption. Ms. Doe can occasionally see things as "black and white" and find it difficult to see the "grays" or mitigating circumstances. As a result, slight problems in communication can grow to adversely affect relationships. When working with the manager, Ms. Doe may have the same problem. Rather than giving the manager the "benefit of the doubt" when the manager makes a mistake, Ms. Doe could pre-judge the manager as not being worthy of her trust. As a result, the manager may feel threatened and begin to close down communication, reinforcing her distrust and jeopardizing the long-term relationship. These comments become less obvious as Skepticism ("Sk") score approaches 61% (see above) and much more obvious as the score approaches 100%.

Coaching Recommendations - - The manager should encourage Ms. Doe to be more versatile when it comes to prospecting for new leads, especially as it relates to "warm" lead generation, such as referrals and centers of influence. From the job-sampling phase of the selection and employment process, it is important to encourage the most efficient prospecting methods. Help her to find a target market in which she can feel comfortable, and then directly supervise the referral generation process by holding her accountable for a consistent prospecting effort. Make sure she is accurately assessing the quality of her prospective buyers and not ignoring markets that she has pre-judged as having low potential. To open the communication process and prevent Ms. Doe's low trust from adversely affecting

relationships, encourage her to discuss areas of dissatisfaction and frustration and act upon each area immediately, reporting back to her as soon as possible. Any agreements involving money or incentives should be spelled out in writing to avoid misunderstandings. Immediately resolve problems between her and her fellow employees by meeting with all parties and addressing each issue in terms of "communication problems." Avoid the temptation to allow these problems to "work themselves out."